

Using Psychological Assessments in Enterprise Education

Jeff Hayes

Cookie-cutter, one-size-fits-all learning has been on the way out for years, as trainers and chief learning officers have recognized the importance of fitting the curriculum and the approach to the individual. Learning needs assessment has become a standard practice, enabling the trainer—or learner—to identify skills and knowledge gaps and to select the specific content needed to fill those gaps.

At the same time there is growing recognition that determining the best learning style can make learning more effective. The problem facing the CLO is that while learning tailored to the individual learner's style, as well as gaps in skills and knowledge, may be more effective, it is likely to be more expensive as well.

How, then, can the CLO ensure that the extra expense is worthwhile? One highly efficient method is the use of psychological assessments that go well beyond the traditional learning needs assessment or gap analysis described above. These high-quality, validated tools assess, among other things:

- Personality type
- Career preference
- Interpersonal style
- Teamwork style
- Leadership style

What these assessments have in common is that they give the trainer, the manager and the learner important insights into the learner's nature. The best-known and most widely used assessment is the Myers-Briggs Type Indicator instrument, one of several that focus on personality type and have a broad range of practical applications. Others are specifically designed to identify a single attribute, such as team style. Still others, with important legal constraints on usage, are designed to assist in employee selection and hiring.

The trainer or manager can use assessment insights to design the most efficient and effective training program for individual employees. Even more important, those employees can then understand their own nature, why a particular training program has been selected for them and how and why they can expect to benefit.

Assessments are often used by managers and the HR department for purposes that include, but go well beyond, training. However, there are many cases where the extra cost can be justified by learning benefits alone. Here are a few examples:

- For a new team or an existing team that could work better, an assessment that identifies teamwork styles can be a great icebreaker for a training exercise.
- For refresher training for managers, self-assessment coupled with 360-degree feedback can ensure a quick start and a proper focus.
- For new leaders, an assessment of both preferences and leadership styles can identify what training is most needed and how it can best be delivered.
- For employee retention, assessments can identify skill gaps, satisfaction gaps, preferences and barriers, all of which can be important in designing a plan for

learning, advancement and recognition.

High-quality assessments take from 10 to 30 minutes to complete online or on paper. Some must be administered and interpreted by qualified professionals, while others can be used by any trainer or by the learners themselves. Books and guides related to the more popular assessments, including many low-priced, off-the-shelf training programs that build on actual assessment results, are available.

To illustrate how assessments can add value that far exceeds their cost and how they can be smoothly integrated into learning, this article focuses on retention. In retention, the financial stake is clear and significant.

Psychological Diversity and Retention

Say “diversity,” and most people think of a mix of races, national origins and genders. But there’s another important form of diversity that managers often overlook, even though it has an impact on the way any organization functions at every level: psychological diversity.

Years of research have shown that groups of employees, no matter what their gender or where they are from, see and interact with the world in very particular and different ways. According to author Allen L. Hammer, Ph.D., “Different employees are motivated by different tasks, prefer different organizational cultures, espouse different values and respond to different kinds of rewards and incentives.”

Understanding how other people see the world, how they prefer to work and the best ways for them to learn has profound consequences. These personality styles influence how teams function and the manner in which managers and their direct reports interact. Better understanding of the effects of different personality styles can be the first step toward improved retention.

Consider the following: Many organizations have moved to online learning without regard for the differing learning styles of individuals. Not everyone is well suited to this approach to learning. Many introverted people love to be on the computer—even in their leisure time. In contrast, extroverted people prefer to be in a group and need to interact with others verbally in order to learn. Online training is often not an optimal method for these people.

As shown in this example, the same experience can energize or frustrate different people depending on their personal styles and preferences. These differences present a challenge to companies because they are often less well known than those based on race, national origin or gender.

When an organization finds ways to help managers and employees more clearly understand the basis of their own behavior, as well as the behavior of others, the outcome will be a firm foundation for better manager-employee interaction. The result? Better functioning teams, more focused learning opportunities and ultimately, higher rates of retention.

What Motivates Employees

When the U.S. economy begins to percolate again, many companies are going to

get a rude awakening. The voluntary turnover rate, hovering for the past few years at a low 10 percent to 12 percent, will spike to the rate we last saw in the go-go late '90s. According to a recent study by Sibson Consulting, employees will begin to leave at rates as high as 16 percent to 17 percent.

Why will this happen? Not primarily because of money. Corporate leaders often make the mistake of assuming that money is the primary motivator. Sibson's survey shows something quite different.

"The employee's relationship with supervisors and the supervisors' competence are the two most important drivers of turnover," said Sibson Senior VP Peter LeBlanc. "Three-quarters of people in our study said that their supervisor's people skills were either very important or extremely important to their decision to remain."

Hammer said that misunderstanding the primary concerns of employees represents one of the biggest errors that companies make. "They assume that what everybody wants is what the decision-makers want," he said. "That's often not the case. The big salary increase that motivates one executive is not going to work with another executive for whom family matters are more important. That person might want time off to spend with the family or the ability to leave in the afternoon to attend a soccer game and then come back later in the evening."

Nancy Ahlrichs, author of "Competing for Talent: Key Recruitment and Retention Strategies for Becoming an Employer of Choice," indicates that employees want care and concern. "That is a phrase that covers everything from 'Does my manager know me and care about me as a person?' to 'Do my manager and my company care about my career?'"

Then the question becomes, how do managers discover the kind of people their direct reports actually are and then make appropriate personnel decisions—such as placement, incentives and training—based on that information.

Assessments in Executive Coaching

For rank-and-file employees, it is vital that their managers understand them, but for senior executives it may be just as important that they understand themselves. For them, assessments of styles and interests can be just as valuable as assessments of personality. Carol Kallendorf, Ph.D., selects from a menu of high-quality psychological assessments to support individual and group coaching of hundreds of leaders—individually and in groups.

In one case, Kallendorf's firm, The Delta Associates of Austin, Texas, was brought in to help a call center's management team work more effectively. She used multiple assessments to probe for problems and identify opportunities for improvement among the 13 managers.

Low resilience scores on the CPI 260 assessment for four of the managers indicated that their physical and emotional energies were close to depletion and their burnout rates were high, providing the insight necessary for Kallendorf to identify stress issues for each individual. The four managers were immensely relieved to have the nature of their stress explained and discussed. The senior manager, whose Myers-

Briggs personality type indicated that she was unlikely to be aware of her subordinates' concerns, was completely surprised by the findings and eager to help.

Kallendorf prescribed specific training exercises to address the management team's needs. Some jobs were restructured to fit individual managers better. In the high-turnover call-center business, retention is up significantly at the management level and among the customer-service specialists they manage. With a dramatic track record of improving retention and employee satisfaction, the senior manager has cemented her stature within the organization.

Kallendorf almost always begins a team engagement with assessments. She uses five or six regularly and others as needed. And she almost always ends with training. "I have selected or developed training programs for hundreds of clients," she said. "It is the assessments and the group discussions triggered by the assessments that enable me to prescribe just the right programs for each specific case."

Development and Type Relevance

Not only can understanding psychological type improve relationships between managers and their direct reports, but it also offers opportunities to structure appropriate and effective development activities. These can take the form of orientation for new employees, ongoing training and even career development.

Allen Hammer, in "Type and Retention: Retaining Talent, Leveraging Type," asks three questions: "Are development efforts appropriate for the types of people in the organization, do certain types receive more attention to their development than others, and do those responsible for development have an understanding of type development?" When an organization administers and explains a personality assessment and provides a forum for discussion, the answers become clear. Hammer reports that many people have an "aha" experience when they see the results of their assessment.

"You can see it when somebody takes an assessment and reads their type," he said. "A light bulb comes on, and they finally see what's been going on for so many years. It might be why they're dissatisfied with their job, with a spouse or with their fundamental situation in life. They realize they've been working against the grain all the time and haven't been really rewarding themselves for their own natural strengths and preferences."

For example, when it comes to training, different types of people may react differently to the types of orientation programs that a company offers. Hammer points out in his publication that Myers-Briggs Intuitive types may prefer one that provides new employees with an overview of the organization so they can see how their particular job fits into the big picture. On the other hand, Sensing types might want to learn the concrete realities that will assist them in being more productive and efficient on the job right away.

Type becomes even more relevant when considering the newer methods of training delivery. It's possible to discover, by administering an assessment, which people will do better on their own taking a self-paced course and which will learn a great deal more in the traditional classroom environment.

“There was a big push a few years ago to have everything online and automate all training,” Hammer said. “I think what happened was after a few years of that, they found out that that was not the best way to go. People are now learning that blended training is better, using some online and some face-to-face. Both sets of people in this instance have some of what they need, but then they have the other things, which could help them stretch and learn in different ways too.”

Companies Can't Afford to Lose Knowledge Workers

It is inevitable that, once the economy recovers and begins to add jobs, all companies will lose some workers through voluntary turnover. Too much pressure has built up in what has been a very stagnant economy for the past few years.

Those losses will be most critical in knowledge-based organizations. When companies lose employees they've already educated and trained, it represents a major drain on resources. Getting new workers up to speed costs time and money that organizations in highly competitive markets can't afford to spend.

However, managers can minimize these losses by establishing the kinds of relationships with their direct reports that are based on a clear understanding of their specific needs. Using a good psychological assessment begins the process of achieving that level of knowledge and understanding. When both managers and employees clearly understand their own styles, they can begin to interact with others more effectively. It's only then that companies can establish the kind of work environment—one that recognizes diverse goals, expectations, styles and strengths—that people seek.

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