



Leveraging the Science of Assessments: The Final Competitive Talent Advantage?

The need for scientific metrics in executive search and leadership consulting

*By Sherrie Barch, President, MPI
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The use of assessments brings a slice of science into the art of executive search, but it is not an end unto itself.

The purpose of the assessment is to provide insight into an individual's behaviors and leadership styles to better understand the way in which they interact with others. This helps to build upon their strengths and to assure alignment with organizational culture. But it is never used independently as a decision tool.

Nonetheless, assessments can bring a definite competitive advantage. The expectation that a candidate or new executive will both fit the organization and thrive requires as much rigor as we can possibly muster, both quantitatively and qualitatively.

What does an assessment reveal? It shows the candidates as

they really are. It can show their core wiring, their core drivers, any behaviors that would limit their effectiveness or leadership, and any other situational qualities that could inhibit their success.

As a supplement to the other evaluation processes that a firm has in place, personality assessments can be quite valuable. In addition to references and a direct interview, the judicious use of these highly reliable, highly validated assessments increases the recruiter's chances of success and the implications of an apt placement.

Recruiting, by its very nature, can be a very subjective endeavor. Interviewers can bond with a candidate for many reasons. Personalities can mesh as common traits and interests surface. It is not a stretch to say that the candidate often owns the interview process.

The ability of a person to be an effective interviewee or turn the tables and conduct a very effective interview has a significant impact on his or her ability to be hired – which can be separate from the candidate’s actual qualifications. Therefore, the predictability around and the utility of assessments affect that variable. It helps to once again level the playing field.

Consultants are interested in helping people adjust their behavior and modify their approach to help them and their companies succeed.

Yet it’s not merely the candidates who need to be assessed. The individual will be joining a leadership team with a fully formed culture and the hierarchies and nuances of the other personalities with whom the new executive will be interacting. Those individuals need to be assessed too.

If assessments are used with the hiring organization, it ensures that one can predict and calculate the

effectiveness of this new relationship or alignment.

Do clients embrace this? Not always. There can be some initial resistance as to why this is important, but the way in which the rest of the leadership team is wired and motivated, and how they communicate and engage, is just as important to ensure the success of our candidate as simply assessing the candidate alone. Business success is a team sport, and one needs to know how the pieces fit together.

In our firm, assessments are utilized for five purposes during the executive search process:

- *Help in guiding additional conversations and interviews with the search team. Assessments provide a window into areas in which recruiters continue to probe and validate.*
 - *Informing content around which references are conducted.*
- *When the hiring manager also completes the assessment (which is a best practice), a compatibility perspective is gained which will be investigated more fully.*
- *Guiding additional conversations with the candidate as the process moves toward an offer. An assessment provides insight into motivations that can be used for negotiation purposes.*

- *Establishing opportunities for on-going coaching and support once the candidate is hired.*

The Team Approach

What about assessments in consulting engagements, especially around executive team performance and executive development?

For executive development, our firm uses the assessments with an expectation that the findings will be leveraged to ensure that this person is effectively developed, has awareness of his or her blind spots or deficiencies, and has clarity around the strengths he or she must maintain and developmental areas to shore up.

A significant part of the assessment and development process is actually the feedback experience when the firm reviews the results of the testing with the executive. A critical predictor of an executive’s success is the extent to which he or she is receptive to owning the feedback. The assessor is looking to determine how open and responsive this individual is to the feedback. One can also get a better sense of those traits through personal interviews, exercises and simulations.

Secondly, how much self-awareness do the executives have? Are they cognizant of their own strengths and areas where improvement is needed? Can they modify or adjust their behavior or

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approach based on the feedback they've received?

The best leaders are continually embracing the opportunity to expand their leadership potential and capacity, adjust their style and approach based on the environment, and utilize ongoing feedback to support the direction they need to go in terms of their development.

Where the Rubber Meets the Road

So how does this work in practical terms? Here is an example. Through executive search, a new CEO was recruited to a health insurer company, and our firm also worked with him on a detailed plan to set him on the path to success in his new role. It went far beyond onboarding, establishing expectations, goals and boundaries for his relationship with his board of directors. The work was successful, and he asked to continue the assessment with his leadership team to work on executive team performance.

Two different assessments were used. One was employed to measure personal style, leadership behavior, motivators, and behaviors that could hamper leadership development. The other assessment measured decision-making, judgment and cognitive reasoning.

Next, debriefing sessions were held with each team member about their results, and work began

with them on a leadership development plan.

The executives were then presented a synthesis of the results of how they functioned and blended together, followed by an off-site workshop. That session included the creation of a plan for the how the group had decided it would function going forward, as well as small-group exercises and one-on-one role-playing that attempted to bring awareness to a number of areas, including:

- *How do people experience you as an individual?*
- *How do you react to stress?*
- *How does this team create a safe environment to have candid conversations?*
- *How does this team give and receive feedback?*

A Nuanced Approach

One must understand that this is not a makeover of someone's leadership style. These are nuanced self-adjustments that allow any leader's true strengths to come out of hiding, while eliminating behaviors that sabotage his or her growth.

What our firm tells executive leaders is simple but powerful: Consultants are not in the business of changing a person's wiring. Consultants are interested in helping people adjust their behavior and modify their approach to help them and their companies succeed.

It can be something as simple as leaders recognizing that, when they are in front of a team of their direct reports, they need to learn to adjust what they're saying or sharing – lest they send their team off in a different direction, without clarity or definition. That's not changing the leader's wiring.

One insurance executive—let's call her Brenda—routinely used a whiteboard with her team to talk about her ideas to sell more insurance. To her, it was akin to a brainstorming session. To her staff, it was marching orders that must be immediately followed down to the last detail.

Brenda had to make an adjustment. What she learned to do was to very carefully and articulately convey on the front end that, for the next two hours, she was simply sharing ideas. No direction would be changed; no decisions would be made. She was not modifying the playbook or changing course mid-stream.

When done carefully and correctly, assessments allow for far more accuracy both in recruiting and executive development, enhancing a company's talent and ability to maximize its success. **MPI**

Subtle Changes Still Speak Volumes

Sometimes, high-powered physicians can be strikingly unaware of the influence they wield, for better or worse. One such doctor (we'll call him Stan) worked in a hospital as an attending physician – an even more powerful designation – who had a tendency to emotionally injure those below him on the totem pole with dismissive comments or by simply ignoring them. He was not one to apologize – ever.

Stan worked in an academic medical center, where young medical students who are training to become physicians frequently accompany the attending physicians on rounds. After our firm had worked with him for a while, Stan was out leading rounds with medical

students in the intensive care unit. At one point, a young female medical student was sharing the results of her examination of one patient just outside the patient's door while Stan and 10 other medical professionals stood around in a semi-circle.

She had gotten three or four sentences into her comments when Stan interrupted her – to apologize for his own behavior. He had been reading an email on his cellphone—rude behavior—and didn't like its contents. He made a face. This distracted and interrupted the medical student's train of thought.

He said he was sorry for not paying attention and making a face, and assured her it had nothing to do with her evaluation of the case, which was perfectly fine. In the hierarchy-rich world of medicine, this was a powerful leadership step forward for Stan, and a powerful lesson on leadership to the team gathered there. **MPI**

FAQs

The Use of Assessments: Digging into the Details

By Bob Clarke, Chief Executive Officer, MPI

Do all executive search firms use assessment the same way? Are there best practices in their use?

The use of assessments within the framework of executive search has traditionally been sporadic at best. There is a very recent trend, however, to include some level of assessment within the framework of an executive search firm but not necessarily as a part of the search process itself. It is a rapidly growing trend to offer some level of assessment services in addition to traditional search as firms seek to increase their service offerings.

Assessments provide general insight into behaviors that need to be validated and confirmed through personal interaction. Some are more robust and informative than others, of course and depending on the information one wishes to gather one assessment will be more appropriate than another. When used in a more holistic fashion as part of a larger process, they are quite valuable. In general, however, assessments cannot speak to technical or experiential expertise. Information from the assessment must be used in combination with interviews and other vetting processes to ensure that an individual is viewed from all of the important perspectives.

Do all search clients expect to use assessments?

While it isn't necessarily an expectation of all clients, they all appreciate any data which ensures a better evaluation process. It is not uncommon for a client to have their own process for assessments either internally or through a third party. This, however, is often met with disastrous results. The search firm feels that they are being challenged and the third party consultant is totally unaware of the process that resulted in the final candidates being presented for assessment. Rarely are the goals and values aligned nor is the recruitment, interviewing and selection process understood. It is better by far to have all of these pieces aligned and done in a transparent manner.

What can assessments tell you – and what CAN'T they tell you?

Norm-referenced assessments like cognitive ability tests, personality measures, and situational judgment questionnaires, can help talent advisors and hiring leaders make more informed, data-driven decisions. Specifically, they help determine whether a candidate “can do” and “will do” well in a given role. Valid assessments that

measure knowledge, skills, abilities, and other characteristics (KSAOs), or those factors that determine whether a person is *able* to perform the necessary duties, as well as motivational factors that predict whether a person will be *motivated* to perform, allow one to make reasonable judgments about a candidate's likelihood of success.

Assessments that are not scientifically shown to be reliable and valid may not reveal anything of value about a candidate's likelihood of success in a role. A test must be “psychometrically sound,” or performance on the measure must be linked to job-relevant knowledge, skills, abilities, or other related characteristics (KSAOs); otherwise, the assessment is unlikely to be helpful in predicting how well an individual will perform on the job.

Also, if the assessments do not measure KSAOs that are directly linked to one's ability to perform, the testing is unlikely to add value. Lastly, if someone who is not trained to interpret a test does so, the data could be misunderstood or used in an inappropriate manner. This is why our firm makes extensive use of organizational and industrial psychologists, highly skilled and trained experts in the field of measuring performance and behavior.

A critical predictor of an executive’s success is the extent to which he or she is receptive to owning the feedback.

If you have done assessments, how important is the personal interview?

A structured interview with a standard protocol used across all candidates is extremely valuable. Frankly, it is ill-advised to use an assessment without exposure to a candidate through a personal interview.

In an executive search situation, how do assessments help you determine the candidate who is the best “fit” for the position?

First, an assessor must understand what is required of the role; that is, what knowledge, skills, abilities, and other characteristics (KSAOs) must an individual possess to be successful in a given position. Once the job is analyzed

and the KSAOs are understood, valid and reliable measures of those competencies are selected. A candidate’s performance on the competency-based assessments allows the recruiter to determine if the candidate is a good “fit” for a position.

How do assessments work in a team situation like executive team performance?

Valid, reliable assessments can be used to measure individual- and group-level capability and motivation as well as the subsequent performance of a team. At the individual level, assessments help to identify each team member’s propensity to operate effectively in a group dynamic. At the team level, assessments provide insight into the likelihood

that members of a team will come together in a cohesive manner to deliver a successful work output.

Different factors can influence an individual’s ability to perform effectively in a team (e.g., sociability, interpersonal sensitivity, openness to new ideas, etc.). For instance, assessments that can deliver insight into one’s ability to communicate effectively, motivate others to contribute, follow through on commitments, and inspire others to perform might be criteria for success as a team member: all of these factors are linked to overall team effectiveness.

About MPI

Management Partners Inc. (MPI) is a company dedicated to providing leadership solutions to its clients –in a variety of industries through the assessment, recruitment and development of talent. It accomplishes these aims through its two brands: Furst Group (retained healthcare executive search) and NuBrick Partners (leadership consulting, executive development and executive team performance).

Assessment is an Asset to Succession Planning

The CEO of a multinational insurance company told his board he was planning to retire. Although he was not the founder, he had built the company into the powerhouse it had become.

An organization that has been led effectively by the same person for many years has some challenges if the company is going to continue to grow once he or she moves on. So much of the organization's history is wrapped up in a single person, so that exit must be handled with care.

Our firm worked with the chief human resources officer to help the company navigate the succession planning process, including the assessment and selection of a new CEO. The methods included lead-

ership and 360-degree assessments and day-in-the-life simulations. Since the leading prospects were internal candidates, this was essential to the process.

The focus was to attempt to remove as much bias as possible in the decision-making process, which was difficult since the internal candidates' reputations and leadership brands were well known. The findings of the assessments were leveraged to determine how the candidates might lead the organization, who they

might become, and how they might behave in the CEO role.

All leaders are human, and assessments aren't meant to decide a definitive "yes" or "no" on a candidate. A key component of the work was to counsel the chief human resources officer and the board on whether weaknesses could be shored up and behaviors could be altered to add strength to each individual.

The woman who ultimately was chosen for the role was announced as the successor and, after the announcement, served one year as president of the company before ascending to the CEO position. **MPI**



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