Selecting the Right Assessment for your Client: Ten Criteria to Consider

By Kathy Barham, President, Lead With Purpose

As a consultant, my clients sometimes ask me to help them identify or create curriculum to support their leadership development and team effectiveness training. These are high-stakes engagements because the client is preparing to invest substantial resources to address a specific challenge or to groom their next generation of leaders. Almost always, an assessment is a foundational element of the program, so choosing the right measurement tool can be the lynchpin of success for the entire program.

Fortunately, I'm able to draw from my experience going through a rigorous assessment selection process as a former corporate L&D executive. I know how challenging it is to do the hard work of evaluating assessments and other tools and models to ensure a program really addresses the needs of the people and results in a positive, sustainable change. So as you evaluate the many fine assessments on the market, take advantage of what my colleagues and I learned as we worked through a thorough selection process.

My previous role was working for a large pharmaceutical company and we were struggling through some difficult transitions. After several years of success with our products and with developing a fantastic culture that attracted and retained great people, we began to lose our close-knit, entrepreneurial feel. A new president had arrived with a more numbers-focused approach than his predecessor, and within a few years many of our best leaders began to leave for other opportunities.

In one 18-month stretch, we lost 40 of our 150 front-line sales managers. Each of those managers led a team of around 10 sales representatives, and many of them were leaving as well. Clearly, something had to change. We were losing really good people, and the high turnover was impacting the bottom line results of the business.

We knew that to do a better job retaining our best people, we needed to invest in those people. Another change at the top brought another president who recognized this as well, so a team of top-notch leaders were brought together to guide the leadership development function and I was honored to be on that team. We were given ample resources, full management support, and a clear mandate to create a career-long, needs-based leadership curriculum from the ground up. It was one of those once-in-a-career opportunities for a learning leader.

Investing in Self-Awareness

As we went about establishing the basis for our leadership development curriculum, we all agreed that we needed to invest in self-awareness. That meant we needed some basic tools—an high-quality 360-tool and an effective self-assessment tool—as well as some basic models around things like leadership, communication, coaching, and selling. Some of our needs were general, while others were specific to our organization.

When it came to self-awareness, the organization already used several fine tools—most notably, Myers-Briggs, DiSC, and Insights—and a colleague who was leading the initiative with me had experienced the SDI during a graduate-level course. So we decided we would experience them all and decide if we should use one or multiple tools as we created our program. Then we built a matrix with ten major criteria to evaluate the tools. These ten criteria still can provide anyone with the filter they need to determine which assessment is best for their client.

Here's what we reviewed:

1. The cost
2. The scalability
3. The delivery formats of the tool
4. The ease of using the tool (for participants and trainers)
5. The genesis of/science behind the tool
6. What the tool measured (motivational values, preferences, personality, etc.)
7. The context of the tool (situational or whole-life)
8. The "recallability" (how memorable the models and the results were)
9. The applicability (how well it fit the needs of our people)
10. The experience/enjoyment (was it entertaining, engaging, and fun)

For some criteria, like the cost or the genesis/science categories, we could simply plug in a number or facts about the assessment tool. For others, like experience/enjoyment, we used a numeric scale to rate it.

We then held pilot workshops led by each of the four companies that sold the assessments we were considering. The companies provided one of their top facilitators and were aware that the workshops were for the purpose of evaluating their assessment tool.

The participants—regional managers, district managers and other leaders—provided feedback that we used for our rankings. Some of the leaders participated in only one workshop, but some were in more than one and provided valuable comparison feedback. Using the internal customers we were charged to develop in the pilots also let them know we valued their opinions, which helped us gain their support as we moved forward.

Picking a Tool

When we finished our pilot workshops and evaluated all we learned, we found that SDI (Strength Deployment Inventory) made the most sense for most of the leadership training we were creating. For starters, it was reasonably priced and allowed the ability to certify internal trainers which we knew would allow for a controlled rollout throughout the entire organization.

But cost alone wasn't enough to swing our decision toward SDI. After all, it makes no sense to save money and spread something throughout an organization if it isn't effective. That would be like saving a lot of money on a fleet of delivery trucks that won't go more than 10 mph. We had to balance cost with quality. In fact, we gladly would have paid more to ensure we were using the right tool. When it came to the issues that addressed quality, however, SDI also stood above its competition.

The color-based system used to describe the basic model and the use of familiar terms like People, Performance, and Process all made SDI simple, intuitive and memorable for the participants, which is critical for personalizing the learning and for spreading it throughout an organization with a common language. This gave it a huge advantage over Myers-Briggs, for instance, which was widely used in the organization but not widely remembered. SDI's terms were descriptive but non-judgmental, so people remembered them, agreed with them, weren't offended by them, and embraced them.

The assessment was easy to administer when we did our evaluation, and it's only gotten better Today's SDI takes advantage of all the latest technologies to provide things like personalized reports, easy-to-use online assessments, group data with well-designed charts, and, if needed, paper-based versions. It's also available in 26 languages, so it's even scalable across global organizations.

From a workshop standpoint, it was (and still is) the most collaboratively interactive. The design and logistics of the workshop allowed for self-discovery. It also created an opportunity to lift our heads up and look at each other and come to understand each other better. And it was more light-hearted. There was an opportunity to laugh at ourselves and laugh with each other. It's a positive environment.

All of those factors made SDI a great choice, but there were two other critical areas where it won out, and these are the ones I end up talking about the most when I tell friends and clients about SDI. One, it focuses on motives not behaviors and, two, it addresses conflict in a seamless fashion.

Investing in Self-Awareness

It's becoming generally acknowledged throughout the corporate world that you can't lead people the way they did in the Industrial Age. You can't say, "This is what you need to do; go do it." People need relationships. The millennial generation in particular doesn't live to work, they work to live. So we need to connect with them in a different way, a way that creates value. And it's impossible to create value if we don't know what it is that they value. We have to know why they do what they do.

SDI provides this because it's based on Relationship Awareness Theory that drills beyond behaviors and gets to the motives that drive behaviors.

When we gain a better understanding of ourselves, we can lift our heads and gain a better understanding of other people. Rather than sitting in a space of judgement, we can sit in a space of understanding. We can become more curious and figure out how we can leverage our differences rather than being frustrated by them.

When we did our evaluation, we found that all of the assessments provided some valuable insights into how people behave. That's still the case as I evaluate tools today. But SDI went the deepest into the areas that mattered most when it came to helping our leaders understand themselves and their relationships with others so that they could do their jobs more successfully.

As I mentioned earlier, our challenge with Myers-Briggs was that nobody could ever remember what they were. But if they could remember what they were, they still lacked an intuitive understanding of the why behind the what. In other words, if I'm charged with influencing and developing an individual who is an introvert, that's really helpful for me to know. If we're at an all-day meeting, I know that person might not want to go to a group dinner. He may want to go for a run and dinner in his room instead. So there's value in knowing that. But ultimately, we connect with people at a deep level of value.

In SDI workshops, it was easy for us to see the discussions switching from what you do to why you do it. When that happens, you have a greater opportunity to influence someone.

When you're speaking to someone's values, when you're using words that are at the core of what drives why they do what they do, they're much more likely to be responsive. If your job is to influence and coach people, you have to open those doors to their values rather than just behaviors. You can miss the mark if you're just looking at behaviors, because behaviors can be deceiving. We can all observe behaviors. And we can all make some assumptions about what's important to someone based on their behaviors. But the fact is, we can be totally wrong.

Behavior alone is only one piece of the information. If you're being charged with really influencing and helping people grow and develop, you have to know what their values are.

We designed our leadership program primarily for people who were in sales. I could work with ten reps in a day, and the behaviors I would see would be very similar. They were selling to the same types of customers and it was the same product and the product had a finite number of features and benefits. So the behaviors of all of our reps was very similar. What we really needed to was to open a window to a deeper part of who they were, to appeal to their why and be able to influence them from that space. It was really clear when we looked at the different tools that SDI provided that.

Conquering Conflict

When we created our matrix, we didn't include anything about conflict, but it ended up being a key factor in our decision to use the SDI. It arose from the criteria we had on applicability, because that measure looked hard at the relevance of the tool to the needs of our people. As it turned out, our people needed help dealing with conflict.

Our leaders were tasked with managing, leading, developing and coaching sales people. From experience, we knew that conflict often arose based off of people's differences. On top of that, we were in a really dynamic industry where the landscape was shifting on a regular basis. Managed care was coming on the scene, so the rules were changing for how we did business--and there

were no experts. We were all learning on the fly and conflict was unavoidable. In fact, every time we surveyed our internal leaders and asked them to identify the things they needed from training, conflict management always showed up in the top three.

SDI puts conflict in the context of values which is a much more useful perspective than treating it as an isolated and occasional event. You can look at why you do what you do and what's important to you, and then you start to understand that conflict inevitably happens because people are motivated by different values. Not better or worse values, just different values.

Emotions run high with escalating conflict--and that creates unique challenges when it comes to accurately assessing situations and the needs of the people involved. It's challenging because we tell ourselves a story and we assume that story is true. Other people, of course, can see the story differently. You may come at something in a very different way than I do, but that doesn't make it wrong and it doesn't mean you're disrespecting my way. So understanding my motives and your motives in conflict helps me become more curious around your path.

With SDI, people develop an increasing awareness around what they do in conflict, how they can recognize the things that cause conflict for them and how they can effectively manage conflict.

Human instinct leads most of us to avoid conflict. It's uncomfortable, and we aren't sure how to step into the conflict effectively. The value of SDI is to understand that conflict happens and that how we experience it is predictably sequential. We can notice early on when it's happening, we can realize we have differences even in conflict, and we can understand how those differences can escalate the conflict. It's a more natural rhythm to realize that conflict isn't a separate event that happens; it happens as a part of who we are on a daily basis just because we're different.

What I've found especially the last two or three years is that as an independent leadership consultant - my client base is really interested in the conflict piece of SDI. That's because technology and access to information have made the speed of doing business today so much faster. People are asked to do more in a shorter time with less information and often with fewer people. That causes conflict for a variety of reasons.

The reason my clients love working with SDI is that SDI calls it out for what it is. SDI makes conflict real. As consultants, we can say, "It happens every day, so let's think about it." Then we can provide some perspective around what causes conflict, not just the fact that we're in conflict. If we have no perspective for understanding what it is about a particular event that caused conflict for us, then we just know we're ticked off. So we just react. And how we react and how anyone reacts in conflict is not all that skillful.

On the other hand, if we understand what can trigger conflict, we have some context that allows us to respond intelligently. In workshops, I often create a common scenario that has the potential to trigger conflict for the people in the room, but for different reasons. We then explore just how different both the reasons and immediate responses can be. This creates the foundation for some fascinating discussions that quickly and easily transition to real-world issues that impact the team's performance.

Improving Results

The leadership training program my colleagues and I created for the company we worked for at the time remains one of the most successful and fulfilling projects of my career. And when the company re-organized and re-formed, we went through a very similar process again, arrived at the same conclusions, and created a program that spread throughout the entire organization. SDI again was a significant tool in all our training, even though other legacy tools already were in use.

To be clear, those other assessment tools can have their place. If managers called and said they wanted to do a workshop with their team, we would start by asking about their desired outcomes and objectives. If it was for self-awareness and the ability to understand each other and work better together as a team, we would go with SDI. And 90 percent of the time, that was what front-line leaders really wanted. If they had some other objective, we might go with a different assessment. Regardless, we were making a highly informed decision based on our research of the tools and the results they could achieve. We were confident because we had been intentional and comprehensive in our approach to choosing the right tools.

Most organizations, of course, don't do what we did. Most companies say, "We've always used this other tool. We don't want to confuse people."

When you actually look closely at the tools on the market, you realize an organization can exist using multiple tools; they just have to use them for the right reasons and in the right times and right places. But if you're choosing only one, you really have to pick the deepest one. You have to go as deep as you can to the core of who the person is below the surface.

As I continue to work with organizations across the country, I routinely reflect on the criteria we established for our leadership curriculum to ensure I'm using the right tools at the right time to deliver the right results for my clients. SDI is constantly improving with new research and new technologies. And it remains a cost-effective solution that's easy to deploy and has all the formats and language versions I ever need. But what really separates it from the competition for me is that it provides the most accurate, memorable, and actionable insights into the motivations that drive behaviors. And this is what clients truly need when they want to change behaviors and improve their results in every aspect of their business.

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About the Author

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