

opp

unlocking potential

# psychometrics in business



A manager's  
guide to  
making  
better  
people  
decisions

June 2009

# Foreword

by Robert McHenry

As a psychologist it always surprises me that the idea of 'psychometrics' conjures, for some people, feelings of scepticism, suspicion and sometimes, downright fear. Most first impressions are wrong and I firmly believe that it's much more frightening to have people form an opinion about you based on their own personal prejudices. By contrast, psychometric tests yield objective data and that's why I find resistance to them difficult to understand.

I have also been surprised throughout my career by the lack of rigour applied to most decisions about people in the workplace. Each hiring decision can be costed at tens of thousands of pounds; the decision to spend this amount on any other purchase is usually scrutinised much more carefully than recruitment decisions, even at a junior level. So why not obtain the results of psychometric tests when so small an amount of money and time can procure 'due diligence'? According to the results of a study by OPP, 71% of all line managers would change the people decisions they've made if given a second chance, and yet nearly one in four (39%) line managers said they still rely on gut instinct as one of the most important factors when making any decisions about their people.

These observations reflect the underlying rationale for our writing this report. When we decided to collaborate with the Institute of Chartered Accountants (ICAEW) on its development, our aim was to demystify a field which we not only believe offers both tremendous ROI for managers, but also sits well with finance people who demand metrics, quantified results and evidence-based decision making. The economic cost of bad people decisions is well documented. Putting the wrong people in the wrong jobs has a direct impact on productivity and efficiency, and the cost of reversing the decision is often considerable. Using psychometrics in your selection, development and promotion decisions helps avoid such mistakes.

We hope that in providing this report to our customers in HR, L&D and resourcing, we are supporting them in coaching their stakeholders – and, eventually, all managers – about how to achieve better outcomes, more consistently in the choices they make about people. We aim to demonstrate that management habits need to, and can, change; it's easy to obtain robust and objective information to inform these choices. Considering proven, prior experience, data from psychometric testing and colleague feedback together creates a much more robust basis on which to make what are, effectively, high-stakes investment decisions. It's the only way businesses can manage risk when it comes to their people in the way that every CEO should demand, and every HR professional should celebrate.

**Robert McHenry**

Chairman and CEO, OPP Ltd.

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# What is personality – and why does it matter?

*The two big questions for businesses looking to make better decisions about their people are – how far can you measure personality, and how could this kind of insight help you manage your company's resources better?*

The word 'personality' derives from the Latin 'persona'. It originally described a mask used by an actor to portray a role and, in time, came to mean the character being portrayed, rather than the mask itself. This shift in meaning embodies the mixed opinions within the psychology community around how far, exactly, you can pin down an individual's 'personality', and how much significance you can attribute to it.

Its utility for business people, though, is substantial and immediate. The more we know about someone, the better we can predict how they will behave and perform at work, the better we can address strengths and weaknesses, and, critically, the better we can manage our risk in hiring or promoting them.

It constantly amazes us as a business psychology firm that so many managers remain willing to make decisions about people based on so little objective data and so few details. In making purchases of £20,000 managers will typically seek multiple suppliers and perform due diligence on them. They will look for quantitative information and subject even personal recommendations to some scrutiny.

Yet, when it comes to filling an entry level role at about the same annual cost, many managers make hiring decisions after less than two hours with an individual, based on whether they like them. Small wonder, then, that in most businesses right now, 5%-10% of the workforce presents intractable

performance management issues that consume the costly time of managers and HR resources – and another 20% chronically disappoint with sub-average performance that quietly erodes profitability.

Gaining an insight into someone's personality typically takes time, but there is a human equivalent of due diligence which can provide reliable shortcuts. Personality measurement – or 'psychometrics' – is an essential element of the process, along with other methods of data capture such as behavioural interviewing (more on this later).

Before we look at psychometrics specifically, we will consider more broadly the different lenses on personality, and how these relate to its measurement for practical purposes.

Psychologists over the past 80 years have developed models to describe personality in more formal and precise ways, and different schools of thought have arrived at different variants. Thousands of research studies have been conducted, most with great rigour and precision. Largely because of this, and due to the sheer complexity of the subject, each model contributes something to the general understanding of personality.

Most psychological definitions of personality make use of one or more of the following ideas:

- a role (as an actor plays it);
- a permanent entity at the heart of our experiences – the 'self';
- a preference for behaving in certain ways;
- an adaptation to the environment; and
- a probability that someone will act in certain ways.

# What is personality – and why does it matter?

Modern, explicit theories and models of personality take one of four approaches:

- trait;
- behaviourist;
- psychoanalytic (or psychodynamic); and
- humanist.

## Trait

This approach is used by most personality questionnaires, including the 'Sixteen Personality Factor' (16PF®) questionnaire instrument developed by Dr Raymond Cattell. It assumes that:

- there are more or less stable, long-lasting and consistent features that underlie our behaviour;
- the same set of traits can be applied to most people;
- people vary along trait lines; some will be more or less warm, anxious or dominant than others; and
- these traits can be measured on a scale and the 'scores' then used to describe and compare personalities.

It is important not to ignore temporary, situational factors (for example, a person may be anxious at a given moment for a particular reason, although generally calm), as we know that measures of emotional stability, tension, apprehension and vigilance are more likely than others to be influenced by our temporary state. Still, the major business benefit of this approach is that it allows you to predict a person's behaviour across a range of situations, and enables measurement of and comparisons between people across a range of criteria one might use for job selection or professional development.

## Behaviourist

The behaviourist approach suggests that people develop habits based on what is rewarded; in other words, a 'stimulus' gives rise to a 'response'. The influential American psychologist B F Skinner was its main proponent. When something is reinforced repeatedly, it becomes part of the individual's behavioural repertoire. The business benefit of this approach is that it can be applied to coaching on an individual level and, of course, in a very general way to reward management on an organisational scale. It is the rationale behind incentives, and underpins values programmes which celebrate desired behaviours and outcomes. It is, however, difficult to use as a means of evaluating personality, since it effectively denies the existence of a 'self'.

## Psychoanalytic

The psychoanalytic approach suggests that much of what we are and what drives us lies in the unconscious mind. Sigmund Freud is its best known theorist. It sees the 'id' (our drives and instincts), the 'ego' (the conscious mind and our 'reality principle') and the 'superego' (our conscience) as being in constant interaction with one another and with external reality. This model tends to inform more clinical and counselling applications than business psychology, although it is used in some types of coaching. However, in building on Freud's work, Carl Jung has been very influential in how personality is measured, eventually articulating some of the themes (such as 'introversion' and 'extraversion') which underlie the Myers-Briggs Type Indicator® (MBTI®) – the most widely used personality instrument in the world. The business benefit comes from managers' applying some of the insights around individual differences to their staff and teams.

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at work

## Humanist

This approach suggests that it is centrally important to see how people view themselves, and defines personality as an individual's way of organising their behaviour in order to achieve consistency with the self – an accomplishment known as 'self-actualisation'. Carl Rogers was a leading advocate, along with Abraham Maslow, whose later theories on motivation ('The hierarchy of needs') are oft-quoted. This model can be very helpful in a development context, and it makes an important contribution in business to how managers understand and act upon the needs of their staff to maintain their engagement.

One aspect on which many researchers agree is that there seem to be five broad factors underlying

## What is personality – and why does it matter?

the scales of most trait systems, This has become known as the five factor model of personality, or 'The big five'. For example, the 16 personality scales of the 16PF can be reduced by the statistical process known as 'factor analysis' into just five scales:

- **neuroticism** – a predisposition to experience negative effects such as anger and depression and other manifestations of emotional instability;
- **extroversion** – the tendency to be outgoing and show sociability, activity and dominance;
- **openness** – the need for variety, as well as imaginativeness and aesthetic sensitivity;
- **agreeableness** – sympathy, trust, cooperation and altruism; and
- **conscientiousness** – organisation, persistence, scrupulousness and need for achievement.

Many practitioners in business psychology believe that whilst these are useful organising principles, especially for giving feedback, the model is too broad-brush to provide a basis for accurate, predictive decision making. Most tools used in organisational settings break these down into sub-scales, factors or facets, so that the different elements of which they comprise can be more closely evaluated.

It is important at this stage to address the concept of 'ability', 'aptitude', 'reasoning' or, as it is sometimes referred to, 'intelligence', as a key component of personality. Indeed, Dr Raymond Cattell believed it to be a very strongly presenting and influential element of personality, which is why

the greatest benefit of helping business people understand personality is that what they can recognise and measure, they can manage

he included a brief measure of it in the 16PF. Most psychological theory and, indeed, empirical evidence, suggests that this has a significant influence on how personality comes across, or 'behavioural style'.

For example, if a person has a very dominant personality and high mental ability, they are likely to be both keen to assert their views and influence others, and able to weigh and argue a persuasive case. If, instead, a person is dominant but has low intellectual aptitude, they are likely to want to lead and impose their strong opinions, but struggle to articulate a rationale and find challenge difficult to handle constructively.

There are varying definitions of exactly what constitutes 'intelligence' but for business purposes, it is helpful to think of it as an ability to learn quickly, to process complex and abstract problems, and a mental agility that enables someone to readily switch between diverse and challenging issues, at pace. Unsurprisingly, many studies have shown it to be a major determinant of performance, but it should never be the key criterion for selection or promotion decisions. You might view it as providing the 'raw horsepower' of a mighty engine, but not the handling, comfort and styling which are also essential in a luxury car.

Most leadership gurus agree that 'emotional' or 'social' intelligence are as, or more, important when it comes to sustainable leadership success, and in inspiring and mobilising others. Companies which employ many smart people often struggle with the dilemma of how to get clever people to accept the importance of interpersonal sensitivity and skills, not to mention acquire this expertise. From a measurement perspective, experts also agree that combining aptitude and personality assessment enables us to predict performance at work with a high degree of accuracy.

People sometimes ask us if you can measure integrity. Integrity testing is quite common in the US, where applicants for a range of jobs will be tested. Areas such as 'lack of work ethic', 'safety behaviours' and 'lack of anger control' may be considered in these questionnaires. Retailers, in particular, want to look at reliability and rule conscientiousness. Arguably, leaders in areas such as financial services should be evaluated for a tendency toward 'expediency' – something the 16PF reveals – that indicates whether they are likely to do what ever they deem necessary in certain situations, rather than work within agreed frameworks and protocols.

## What is personality – and why does it matter?

In what is known as 'protective services' in the US (jobs in which people carry guns), where the risks of getting the wrong person can be high, by and large employers want to know about any abnormal psychological tendencies. Sometimes a person's inclination to take risks will also be evaluated. One of the most-used questionnaires within the police force and in prison officer selection (offered by Hilson Research) simply asks candidates about a range of past behaviours – such as habitual drinking and minor criminal offences – and outcomes – such as car accidents and relationship issues – which correlate with instability and so represent an employment risk. Perhaps surprisingly, people tend to answer these truthfully. The use of integrity tests has not yet taken off in the UK. Due to the subtlety of interpretation needed – and the sensitivity for the candidate – they should only be used by highly trained professionals, typically with a background in clinical psychology.

### Nature vs nurture

Finally, we come to the 'nature versus nurture' debate on which both psychologists and lay people have always had differing and strong views. This amounts to: 'Is our personality more influenced by our environment and how we are raised, or by genetics and what we inherit from our parents?' Many research studies have been carried out with identical twins. Those separated at birth and brought up apart are, later in life, similar in some personality characteristics, such as extraversion (how outgoing we are) and neuroticism (how predisposed we are to stress and anxiety), suggesting that these attributes are very much a product of nature. Other studies have looked at non-identical twins, adopted children and siblings, and have found that these typically 'inherited' personality attributes are a lot less similar within the groups. However, the fact that values, motivations and attitudes within these groups are often similar tells us that some of 'who we are' is a result of environmental factors'.

So, although genetics has an influence over personality it is not the whole story. Clearly, some forces within the family make us different from other members – for example, sons and daughters, or eldest and youngest are treated differently in myriad ways. Then there are the contextual factors of how and where we are raised, such as social class, economic conditions and shared culture or values. Most experts agree that nature and nurture combine to shape personality, and that we are a complex product of a collection of influences which can be hard to trace and separate.

From a business psychology perspective, however, these causes matter less than outcomes. The greatest benefit of helping business people understand personality is that what they can recognise and measure, they can manage. As with finance, if you can classify seemingly diverse variables and you understand the effects of certain actions upon each of them, you optimise your ability to achieve the best results. So it is with people. If you know what drives them, what they need from you, how they differ from others and what their assets and liabilities are – you can ensure they perform higher, stay longer and yield more. And you will almost certainly enjoy your work more, too.



# How to measure personality – and why bother?

*The more you know about human variables, the easier it will be to predict and manage risk, and optimise talent. But what is the best way to measure personality?*

When you measure personality, you can predict how people are likely to perform at work and in teams, and where they will need most management support. You can gauge career 'headroom' and potential for growth, as well as prevent rising stars from 'de-railing'. At a senior level, you can coach executives to high performance and build resilience. It boils down to this: if you know more about human variables, you can manage risk and optimise talent.

Recent surveys show that economic pressures, experienced both at work and at home, cause increased stress levels at work. Anxiety is a powerful catalyst in changing the way people behave in sometimes unexpected and highly individual ways. Good data on personality enables you to understand how people apparently transform under pressure, and you can adapt your management style and support accordingly. Crisis situations of all kinds can be turned around more quickly when you can address your teams psychological needs, rather than trying to manage through with logic and data as your only weapons.

So, how best to do it? Just as with defining personality, when it comes to measurement, differences of opinion exist, although they are subtler. Trait psychologists believe that personality shows consistency across situations. But we must take into account state, or the frame of mind of an individual based on recent experiences or immediate situation. In practice, our behaviour in any given

situation is likely to relate both to our typical personality (stable traits) and how we feel at that moment (temporary state). So, you may be a relaxed person, but unusually anxious at the moment because you are about to give an important presentation.

Some psychologists believe that the influence of personality versus context on our behaviour varies between what they call 'strong' and 'weak' situations. Strong situations are more likely to be construed in the same way by everybody; they induce more uniform expectations about what behaviour is expected, even to the point of having associated rewards and incentives. Weak situations, by contrast, are more ambiguous and exert fewer pressures for conformity – they are less well regulated by social norms and rules. The stronger your sense of 'who you are', the more individual behaviour shines forth, even in strong situations.

Some studies have shown that in weaker situations – for example, 'goldfish bowl' reality TV shows – personality shows a stronger relationship to behaviour. In other words, where there is room for discretion in your choice of actions, personality will be a determining factor in those choices.

This certainly fits with many people's experience of how leaders, especially, behave in the workplace. When employees become more senior and face situations where clear guidelines and templates do not exist and contradictory and ambiguous data abounds, previously unnoticed elements of their personality can surface and boost or de-rail their performance. This means that, if we are to manage the risk associated with making decisions about people, it is essential to measure those elements of personality which research shows tend to remain stable.

## How to measure personality – and why bother?

Many different techniques have been used to measure personality; naturally enough, our approach is influenced by the theory or model of personality we adopt. Some are objective, some more subjective and some just plain strange. We will consider a few of the common approaches in business psychology before looking at psychometric tests in more detail, specifically:

- self-report;
- report by others;
- group or individual situational assessments;
- behavioural observations; and
- task performance measures.

### Self-report

This is the most common method, with the interview being almost universally used at some point in the selection process. Interviews which focus on eliciting specific examples of the types of behaviour required for success in a role can be very effective, but too often they are unstructured and subjective – and so, do not yield much meaningful data. Application forms and CVs are also forms of self-report, and many organisations, particularly those with automated recruitment processes, use structured templates for these as a means of gathering behavioural evidence to 'sift' candidates before the interview stage.

Questionnaires are another option, and are arguably one of the best ways to assess personality for several reasons. Chief of these is that the best of them are well supported by research and are proven to measure what they purport to measure (that is, are 'valid'), consistently over time (that is, they are 'reliable'). More on this, later.

While self-report is straightforward and convenient for the person completing it and for the organisation, it does assume a degree of self-knowledge and honesty on the part of the individual. Reputable questionnaires include techniques to detect distortion, or when a person is 'faking it' – either consciously or otherwise – and incorporate scales which measure 'impression management'. The 16PF includes three different scales to detect 'faking', including one that looks at an individual's tendency to simply agree with statements. If scores on these scales are elevated the interviewer can explore underlying reasons in discussion with the individual.

### Report by others

This has become increasingly common in the context of development. In '360-degree feedback' peers, superiors and subordinates all answer questions about an individual's workplace behaviours, and the subject also rates themselves against the same questions. This effectively provides personality trait information; in fact, some personality questionnaires can be adapted for use in this way. The outcome is a report which tells the individual how others see them against performance factors identified as important in their role, and allows them to explore any discrepancies in perceptions, particularly their own blind spots.

There are a number of obvious drawbacks with this method of assessment (it is obviously not suitable in selection situations), but you manage most of these by good communications around its implementation. It is essential that respondents know that the data will be used constructively and confidentially, and not to 'determine performance or as the basis for de-selection decisions'.

Of course, it will leave gaps, since some aspects of personality may not be obvious to others but are still critically important in certain situations, and this is why '360' is so often used in tandem with psychometric questionnaires (see *Case study 1, page 10*).

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### Group or individual situational assessments

These are used in 'assessment centres', both for selection and developmental needs identification. The start point is determining what skills or 'competencies' are needed for success in a role.

Then, exercises, activities and role plays that simulate the demands of the role can be designed to give an individual the opportunity to demonstrate the required behaviours.

Observers need to be carefully trained so that they know exactly what to look for and how to score it. Such assessments are generally more valid when conducted one-to-one, rather than in groups, as people's behaviour naturally varies depending on with whom they are interacting. It is also difficult to assess whether behaviour seen in this context really generalises to other situations.

While this approach is useful for evaluating what an individual is capable of, it does not explore who they are or why they behave as they do; the underlying motives, attitudes and values which drive performance at work day-to-day can only be the subject of speculation. So, using psychometric data along with the outcomes of these assessments provides a more reliable basis for prediction.

### Case study 1 360-degree feedback

A financial services company wanted to communicate the leadership capabilities required by the organisation to their high-potential employees. Their goals were to provide better clarity around promotion criteria, and a framework for development activity to accelerate the readiness of the high potentials to step into more senior roles.

OPP developed a description of the skills, attributes and experiences needed for leadership success in the company, basing it on the business strategy and future likely demands of leadership roles, rather than on the profile of successful past leaders.

Each high potential employee completed 360 multi-rater feedback and the 16PF questionnaire. Peers, subordinates and managers also completed 360 evaluations on each member of this group. On the basis of analysing gaps between the results from these and the leadership model, development planning discussions took place.

The company used peer-coaching to develop high potentials' coaching skills at the same time as addressing their development challenges. As a result, high-potential leaders enhanced their self-awareness and their understanding of their impact on others, and committed to development plans for the future.

## Behavioural observations

These can be a powerful means of evaluating performance but this is not to be confused with determining personality. It is very difficult to sift and weigh examples over time sufficiently consistently, against really stable criteria, without either stereotyping or being influenced by preconceptions, in order to arrive at firm conclusions about someone's inner workings and motivations.

As fellow humans, we are influenced unconsciously by the 'halo or horns effect' – in other words, selectively attending only to all the good or all the bad things about a person – and by what we infer as we judge each situation we observe. We might, for example, assume that someone who is sensitive to others, has a good sense of humour and is outgoing and likeable is also intelligent - even when they are not. In a work setting, managers need to be skilled observers to help them decide how to get the best from their people and when they need support of different kinds, but should not confuse this with personality assessment.

## Task performance measures

These are a technique more often used in clinical than occupational psychology, although variants of this sometimes feature in assessment centres, particularly group exercises. An individual is asked to perform a task and the way they do it is used to infer something about their personality. Even assuming that there is only ever one optimal way to accomplish a task, behaviour in such an exercise is likely to be strongly situation-dependent and sifting the truly predictive data on 'core' personality is very difficult.

So, most methods of measuring personality have their strengths and limitations in a business context, which is why assessment events – or 'centres' – which involve a variety of techniques yield the most precise and predictive information. In deciding how to approach human due diligence, companies need to consider the balance between cost and risk. The more senior or business-critical the role, the greater the organisational risk at stake, requiring a more robust data gathering process. Curiously, many organisations adopt the opposite approach and hire senior people on the strength of the word of a head-hunter, while putting their front line or entry level staff through multiple interviews, simulations and tests. Executive failure is the well documented – and costly – consequence.

# How to choose the right psychometric test

*When it comes to personality testing, you want to ensure your results are fair and accurate. For this, a good psychometric instrument must meet certain criteria.*

Returning to personality questionnaires, we will take a more in-depth look at the different types, how they are developed and what the pros and cons are of each in a business application. First, though, we will look at the key criteria any good psychometric instrument must meet, since any internet search will reveal a tempting list of thousands of apparently viable options at low cost and requiring no formal training or qualification.

There are three essential criteria:

- reliability;
- validity; and
- sensitivity.

## Reliability

This reflects whether the test is accurate, precise, and free from error. It indicates whether scores are consistent each time you take the test. For example, does your score for 'extraversion' change depending on what mood you are in or where you are when you take the test? (It should not). Research shows that personality actually changes very little over time, so it is essential that a test reflects this.

Reliability is measured through correlation studies which compare two or more sets of scores on the same questionnaire for the same group of people. It is expressed as a 'reliability coefficient' or 'alpha score' where '1' is perfect but in practice anything upwards of .6 is acceptable, and .7 is optimal.

(Beware higher: the concept being measured is likely to be more narrow than is useful and the questionnaire will be very repetitive).

## Validity

This tells you whether the test is proven, through research, to measure what it sets out to measure. In short, does the test 'do what it says on the tin'? For example, is there a strong match between how outgoing and sociable people are described by those who know them, and the score the person gets on the test for the personality factor 'extraversion'?

A test can be reliable – that is, deliver consistent results – but not valid – that is, inaccurate as a metric. If a questionnaire is unreliable, it cannot be valid because if it does not measure consistently, scores on the questionnaire cannot be expected to link with any external performance measures. So you might say that reliability is getting the questionnaire scale right; validity is getting the right questionnaire scale. Validity is expressed as a coefficient where .35 is reasonable and .45 and above are good.

HR practitioners may refer to 'face validity' in personality assessment and it is worth explaining the relevance of this. It is the extent to which an assessment appears or looks as if it measures what it claims to measure. Some extreme examples are the CPI, which contains questions that may seem obscure or strange, and the Occupational Personality Questionnaire (OPQ), in which the questions are clearly work-relevant. Yet, while the CPI is very difficult to fake and those who use it say that it gets to core personality in a way that no others do, the OPQ is very transparent and is criticised as being easier to manipulate. The 16PF questionnaire arguably takes a middle course.

### Sensitivity

This indicates whether a psychometric tool measures the important differences which have practical value in distinguishing between people. For example, does 'extraversion' tell us something useful about how an individual will behave in any situation, and consequently in what circumstances they will flourish or flounder? (Indeed it does). The two previous criteria reflect this to some extent, but it is also a matter of the research pedigree of the instrument and its established use in various contexts.

For example, the Myers Briggs Type Indicator has been used in development, coaching and counselling since its creation some 40 years ago and thousands of research studies have been produced to verify the outcomes. It is completed by some 3.5 million people each year, and numerous journals, papers and user groups attest to its practical value in helping people understand themselves and one another in a resonant and lasting way (*See Case study 3, page 15*).

These criteria satisfied, how to choose an instrument from a shortlist of options? As with any set of tools, it is 'horses for courses'. Practitioners will select an instrument based on the application and need in hand, their preference for the particular model underpinning it and their experience of results in the field. Most will use several. Some large organisations take policy decisions to embed an instrument in their selection processes and technology for consistency, and do not subsequently fine tune their approach for each situation.

Most personality questionnaires, such as the 16PF and CPI instruments, use a trait approach. The respondent is measured on a number of personality scales, or traits, and scores from 'low' to 'high' on each of them. So, on the Warmth scale of the 16PF, for example, someone might prefer a great deal of emotional detachment from people and score at the low end, or have a high level of interest in and attentiveness to others, scoring high.

By contrast, other questionnaires such as the MBTI and the Belbin self-perception inventory take a type approach which seeks to categorise each individual. In the MBTI, for example, a person has preferences either for sensing or intuition – one or the other, rather than sitting at a point along a continuum. So, their having a preference for sensing does not mean that they have scored low on intuition; the scales are simply different.

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Many practitioners use both sorts of instrument in different situations, and often, use the two together. This combined approach can give subtly different perspectives on a person – invaluable, particularly, in coaching situations. But there are some key distinctions between them which simplify the choice.

### Type or trait

Type questionnaires are typically unsuitable for recruitment and selection (the authors of the MBTI expressly forbade this, in fact) but extremely powerful for development. The main reason for this is that trait scores indicate the amount of the trait possessed by a person, and type scores, rather, how clearly they fit within one type rather than another. So, when you know that a certain trait is likely to lead to success in a role, you want more of it – and a trait-based questionnaire will give you this predictive measure of how frequently you are likely to see certain behaviour. You can also compare and contrast candidates based on this metric.

Further, trait causes behaviour, whereas type is more a reflection of a behaviour choice, and a person can, at least theoretically, choose to use an opposite preference in a given situation. This is why type is so valuable in a development context; it is implicit in the model that people can learn to adapt and flex their style – and so broaden their behavioural repertoire.

You may be thinking by now that this is a complex and scientific field in which a little knowledge is a dangerous and potentially damaging thing – and you would be right. That is why all reputable test providers take a very clear stance on the qualifications and training required to administer such instruments, and make strong recommendations about what constitutes ethical use. In some countries, the relevant psychologists' governing bodies insist that psychometric tests are only sold

## How to choose the right psychometric test

to and used by qualified psychologists. This tends to allow inferior and imitative instruments to spawn which unscrupulous providers sell to all comers.

are, the better the outcomes for individuals and the companies who employ them.

### Qualification training

In the UK, however, the British Psychological Society (BPS) stipulates that to purchase and use ability tests you must be 'Level A qualified', and, further, 'Level B qualified' to use and purchase personality instruments. This is open to anyone – at OPP, we see many non-HR people complete the training. You can visit the BPS website at [www.bps.org.uk](http://www.bps.org.uk) for more information.

All reputable providers also offer qualification training dedicated to one or more of their instruments, and insist on a conversion course (albeit a shorter programme) if you are Level B qualified with other instruments. To buy any of these tests you have to show proof of qualification. A few notable exceptions include the Thomas-Kilmann Conflict Mode Instrument (TKI) and Innovation Potential Indicator (IPI) instruments.

In this way, the BPS and good suppliers work together to try to control the quality of tests in the market. It is less easy to control the quality of the user experience, however. Training should equip practitioners with more than just technical knowledge; its needs to cover the practical and ethical application of the instruments. For example, giving participants the opportunity to practice giving feedback with 'guinea pigs', ensuring that they do 'fieldwork' (the equivalent to wearing L plates for their first few 'live' feedbacks) and checking that they have really grasped the meaning of all the specialised terms is essential. This is why 'short' is not always 'sweet' when it comes to psychometrics qualification. Training from companies like OPP includes these elements, along with observer feedback and a post-workshop helpline to ensure that quality is maintained.

Good suppliers also promote clear ethical guidelines about how to use their tools. For example, results are confidential to the individual completing the test, unless they agree upfront that these will be shared – say, with their manager, coach or HR person. We would caution against taking selection decisions (either 'in' or 'out' of an employment pool) without other supporting data. No one should ever be told that their personality is 'wrong' or 'bad' and others, 'right' or 'good'. There are many tiny nuances in preparing and feeding back to an individual which practitioners should observe for optimal results. In summary, the more sensitively deployed these tools

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# Applying psychometrics in business and finance

*We are not always as good judges of character as we may think. In this section we look at how applying psychometrics can prevent us making poor choices in business.*

## Selection for recruitment and promotion

It is a rare manager who has never regretted a hiring decision. Unfortunately, selection mistakes do not end with a moment's regret; they devour management time, HR resources and the good will of the team, and they usually mean that the job for which the person was hired does not get done well, if at all. Cost estimates from various sources for selection errors range from one to three times a person's salary, depending on the level and role in question.

Worse, we have all seen promising individuals' performance slip as they are promoted beyond their ability, into the wrong job or before they are ready. The cost in such cases is arguably higher since these employees were probably above average performers in their previous role. Performance problems not only tax the skills of most finance managers but also steal their focus from time-sensitive work, which impacts the business. So, how to avoid such expensive and distracting mistakes?

The key facts to remember about making selection decisions are these: first, we are not as good judges of character as we think we are, and, second, if we are not absolutely clear what we are looking for, we might settle for the wrong person. Starting with this premise, it is easy to see that one should build in to the process multiple perspectives, evidence of past

behaviour and objective personality data, all of which are founded on a clear statement of the skills, experience and attributes needed for success in the role (see *Case study 2, below*). So where to start?

### Case study 2 Recruitment

An international financial services organisation needed to ensure it was hiring the cream of the graduate crop that could be developed for future leadership roles as well as fulfil entry level roles effectively in the short term.

OPP designed assessment centres, which used a variety of custom-designed simulation exercises, set within the context of the business. These included role plays in which participants were asked to conduct a coaching assignment, presentations based on analysing a business scenario, and the production of a written report. These behavioural assessments were designed to give participants the opportunity to demonstrate skills needed several years into the business, as well as in the entry level role.

To supplement this, the company wanted objective data on mental ability. They chose the ABLE Series, a set of aptitude assessments that reveal not only current ability, but also ability to learn. This is a way of uncovering raw reasoning ability, rather than learned skills around numeracy or literacy. ABLE describes a scenario and asks the participant to make recommendations and inferences based on certain pieces of information – a kind of written simulation exercise.

OPP trained the in-house assessors – the firm's own HR team and managers – and led and managed the centres to deliver a solution that built its employer brand as a graduate recruiter and supported more robust hiring decisions.

### 1. Defining what is needed

Looking at people who excel in their roles is a good starting point in building your requirements. What, exactly, do they do so well? How do they spend most of their time? What personality characteristics do they possess? What have they done before that has equipped them to succeed? This information will help you create a job profile, which differs from a job description in that it specifies not just what needs doing, but also what is required to do it well. It is tempting to restrict this activity to technical skills in some finance roles, but this misses the point about why people fail. The absence of technical competence in an individual is rarely the cause; it is more often how they do the job and who they are than a shortfall in what they know.

If it is a new role, ensure that all stakeholders are involved in specifying against the above list, including, for example, next-in-line managers and internal customers. Their views invariably focus the mind on soft skills rather than technical ability, which they usually take for granted.

#### Case study 3 Myers Briggs

Following a company restructure, a global professional services firm wanted to help leaders motivate and empower employees. While they possessed considerable technical ability and were very bright, many managers lacked the ability to motivate, inspire and coach their people. As the organisation was going through a period of change, managers needed to win the hearts, as well as the minds, of their teams.

The MBTI was used to underpin a series of development seminars aimed at helping leaders manage and implement change. This meant every participant completing the inventory, receiving feedback on their 'best fit type' and then sharing these new insights between members of the group. As they learned more about the ways in which they were all different, managers began to recognise that a 'one size fits all' approach to leadership was not going to help them re-energize staff, and began to learn to adapt their approach to different people and situations.

Since the introduction of MBTI seminars, survey results from June 2004 have shown quarter on quarter improvements in performance, particularly in the key areas of leadership and desire to remain with the firm. The improvements have been such that this division is top of all the national business units in its people performance.

### 2. Screening and sifting

As to the selection process, there are several points at which psychometric data is particularly valuable. First, in large scale recruitment, it can be used to screen candidates out. Some companies use ability tests in this way. If personality instruments are used here, there needs to be a valid mapping between what the test measures and the competencies required for the role, typically done by the psychometrics provider.

More often, psychometrics are used to support the interview stage of the process. They help you identify 'true positives' (those who perform well in the recruitment process and continue to perform well in the job), avoid 'false positives', (those who seem ideal for the role but whose performance in the job falls below expectations) and spot and save 'false negatives' (those who perform poorly in the recruitment process, but if they were selected, would perform well in the job).

There will always be some false positives and false negatives, but using psychometrics reduces the number of candidates who fall into these categories. Proven to be an accurate predictor of job performance, they increase the proportion of 'true' fits, a critical determinant of the cost effectiveness of the selection process. In fact, research has shown that comprehensive assessment, including both personality questionnaires and ability tests, has a predictive validity over four times higher than an unstructured interview.\*

### 3. Analysing the questionnaire results

When a candidate completes a psychometric instrument such as the 16PF, the recruiting manager will be given a report describing the individual, and a list of questions which help him or her 'get underneath the skin' of interview responses. Typically, the actual scores will be used by the trained HR practitioner or professional recruiter and he or she might suggest question areas to add to these. So, during the interview, where the candidate gives examples of what they did in certain situations, the interviewer can probe and explore the motivations underlying these actions.

### 4. Interviewing

A good interview is neither a friendly chat nor a grilling. Its single purpose is to elicit examples of

\* Source: M Smith, 'Selection: Where are the best prophets?' *Personnel Management*, 63, December 1986.

the skills you are looking for in the past behaviour of the candidate, because as every credit manager knows, past behaviour is a good predictor of future behaviour. Questions like: 'Tell me about a time when you [relevant verb] ...' are invaluable.

### 5. Integrating all the data for decision making

Once all the data is gathered from several, different interviews and from the psychometric assessment, the manager(s) and HR professionals can share their evidence and build up a complete picture of each candidate. They should not be afraid to challenge one another and cross-reference against the psychometric outputs to check areas of uncertainty. Better to check the 16PF data to determine, for example, whether an apparently reserved candidate is actually uninterested in, and prefers to keep their distance from, others and, so, is not the right person to head up credit control, or whether in fact they warm to others on further acquaintance and will show just the right balance when talking firmly to customers and encouraging their team.

### Leadership development, managing and motivating people

It is a cliché that people who work in finance departments are more task-focused than people-focused, but an interest in and aptitude for objective analysis, attention to detail and independent working certainly help. Research on MBTI types in different functions shows that in finance, sensing types – those who prefer to make decisions based on data, who trust their experience and who prefer the concrete – outnumber intuitive types – those who see connections between apparently unrelated ideas, and who are more future-focused and abstract in their thinking. But finance people need a repertoire of 'soft skills' to succeed, particularly as leaders, in modern organisations of all sizes (see *Case study 4, right*).

It is a giant step for many smart people to fully realise that different models of the world – different interpersonal needs and drivers – underlie colleagues' reactions, and that understanding and adapting to these can lead to radically better interpersonal relationships. This starts with the questions: 'Who am I?' and 'How am I different from others?' By providing a framework for exploring these, and so, the basis for developing your leadership style, psychometrics like the FIRO-B, MBTI and 16PF instruments are particularly powerful.

### Case study 4 The leadership journey

A global market leader in semiconductors uses the MBTI Step II to help those with high leadership potential to deepen their self-insight as a basis for personal development, and to help them manage change and work effectively in teams.

Each individual completes a Step II assessment and is fed back the results by a trained MBTI practitioner. This helps them understand how particular aspects of their behaviour may seem unpredictable and unexpected to others because they are 'out of type'. It also enables them to explore their own type preference at a deeper level, increasing their insight into their own natural strengths and areas requiring further development and rounding as a leader.

An additional 450 senior managers complete a programme called 'The Leadership Journey', which incorporates the MBTI. This uses self-awareness as the basis for developing an 'authentic' leadership style which is both sustainable for the leader, and credible for those being led. Authentic leadership is important for this organisation because as a global business it encourages people to lead in a style that is natural for them, rather than exclusively with reference to a globally uniform template.

When learning outcomes are evaluated through externally run surveys, the MBTI consistently emerges as one of the most powerful elements of the programme. Even at this senior level the MBTI makes leaders much more aware of how their own preferences dictate behaviour, its impact on others and how they can change this. Leaders report that it stays with them throughout their careers, giving them lasting insights they can keep working on, and the MBTI Step II enables them to take this to a new level.

For those in leadership roles in finance, psychometric assessment provides essential insight into how you can get the best out of those in your team. If, for example, you know that a colleague is prone to missing deadlines and this is a constant source of frustration to your punctual nature, the MBTI instrument can reveal whether this is as a result of his or her failure to listen properly to your requests, or, rather, an in-built preference for remaining open to new ideas and input till (or even, slightly beyond) the very last minute.

Conversely, when you call meetings without notice and expect your team to be ready to share their views, the MBTI or FIRO-B instruments can explain why certain members sit glowering at you and contribute almost nothing to the discussion till several days later. It is almost as important for high performance to understand what you do that demotivates others as it is to be aware of how you can engage and energise them.

Another benefit of self-awareness is that you can develop a leadership style which is 'authentic'. (Rob Goffey is one of the thought leaders in this well-researched field). It is easier to sustain a way of being which is based on who you really are – and also, a lot less stressful – rather than a prescribed model of behaviour. As there are a number of ways to accomplish the goals of a manager or leader, addressing these goals by leveraging your strengths (and through some understanding of your weaknesses) will help you be more confident and consistent. This, in turn, leads to your earning the trust and support of those around you. At the heart of this is self-knowledge – exactly what a sophisticated, trait-based psychometric assessment such as 16PF or the CPI delivers.

Personality is also a factor in executive de-railment. Generally defined as 'strengths over-used', derailers are characteristics which undermine performance when individuals are over-stretched – either through career or job transition, intense pressure, or when handling change. You might recognise the brilliant project manager who has become the micro-managing control freak in a senior leadership role; or the 'entrepreneurial' sales star promoted to leading the team, who becomes a risk-taking maverick. Personality tools like the 16PF can help reveal these hidden tendencies before they blight careers – and team performance – so that they can be managed.

Tools like these also offer a selection of outputs, including a range of expert reports which speak specifically to different situations. For example, reports generated from the 16PF questionnaire include those on topics ranging from potential for a management role, to career planning and development, to those for in-depth coaching and leadership development applications (see *Case study 5, right*).

It's worth a word at this point on the value of understanding people better in order to recognise and manage their performance under stress. When people are in the grip of the 'fight or flee' physiological reaction, the level of cognitive and, thus, behavioural

distortion can be vast. The tenets of the MBTI maintain that people become almost the opposite of their normal selves (interestingly, a state referred to by practitioners as being 'In the grip') which can be bewildering, and then, frustrating, for managers.

If you know someone's type preference, not only can you spot stress behaviour quickly, you can also provide the person with the right kind of resources and support they need to combat the causes. Better yet, armed with a good understanding of the types in your team, you can try to behave as a manager in ways that prevent their becoming stressed in the first place.

### Case study 5 Leadership development

This organisation faced two main challenges: having to compete commercially, and maintain its position as one of the greatest research institutions in the world. Due to external pressures, these challenges had intensified over recent few years and it had become clear that the skills and attributes which worked in the past may not be enough to enable it to realise these goals.

A new senior management development activity was designed to align the top team's skills with the strategic requirements and goals of the organisation, and to help them drive essential change. This approach was intended to start from generating self-awareness and motivation to change, as well as to yield objective data.

A development simulation based on a fictional, newly privatised organisation seeking commercial independence was used to enable trained assessors to observe participants' approach to leadership challenges. Following the simulation, participants received peer feedback on their leadership style and its impact on others. One-to-one coaching sessions were held with each manager, drawing on observations from the business simulation, the 16PF personality questionnaire and a 360 degree feedback instrument. These sessions kick-started the development plans of each participant as they set about 'closing the gap' between the skills needed to realise strategy and current capabilities.

The organisation has seen major changes in the behaviours and effectiveness of its leaders. The data has also provided the top team and HR with a comprehensive audit of its leadership talent, and where gaps need filling.

### Case study 6 Working partnerships

To meet its business goal of becoming the 'ultimate logistics partner', this company wanted all its managers to be able to build more equal relationships with demanding and assertive customers, leading to stronger, more durable client partnerships.

The MBTI was at the heart of a two-day workshop for a group of managers including members of the sales, finance and support teams. Few were used to relating the importance of 'soft skills' to their effectiveness at work, being more geared to focusing on functional and commercial competence.

Having identified their MBTI type, participants were paired with individuals with different type preferences and asked to communicate certain information. They then practiced adapting their style according to that of their role-play partner and began to see significantly improved results in terms of levels of mutual understanding, speed of agreement and quality of both relationships and outcomes.

As a result of this training, managers also recognised the potential for this learning to benefit them on a personal level in their relationships outside work; they saw that communication that takes type preferences into account can greatly enhance the quality of all kinds of interactions.

Tools like the 16PF empower you in similar ways by giving you an understanding of what factors in your leadership style and organisational environment are likely to create pressure for individuals. In short, the better you know your people, the more you can ensure that pressure acts to enhance performance rather than building to excess, where it can damage not only short-term performance but, also, the individual themselves longer term.

### Managing conflict and negotiating

The tough discussions within the organisation often fall to finance people, both internally – with managers and budget holders – and externally – with suppliers and customers. But this does not mean that you have to 'act tough'. There is a common misconception that warmth and competence are mutually exclusive, but in fact people prefer to assist those they see as warm and tend to block those they see as cold. (See the work

of Amy J Cuddy, Susan Fiske and Peter Glick). Those in finance, as elsewhere, need to develop and use social skills that compliment their expertise as highly competent technicians to get consistently good results from situations where they are required to influence others.

Again, understanding your natural influencing style is extremely helpful to developing alternative approaches. The MBTI, FIRO-B or 16PF will all reveal features of personality which are likely to bear on this, such as how dominant, rule-conscious, socially bold, tense or resistant of control you are. If you are conscious that an underlying characteristic keeps sabotaging important negotiations, you can be on your guard against it and develop a different strategy. The TKI is specifically designed for this, and looks at people's preferences in relation to how far they tend to compete and/or collaborate. It helps them identify situations in which various permutations of the two are likely to work best so that they can cultivate and choose the most 'high-yield' behaviour.

Where a work situation has deteriorated into conflict, the FIRO-B is particularly effective. It examines the personal needs that people have from their interactions, and the discrepancy between what they want from others, and what they outwardly express in their behaviours towards others. Sometimes we are not even aware of these being at odds in ourselves, so this self-insight alone can create a 'light-bulb moment'. But understanding that the combative streak you see as apparently ingrained in someone is actually a surface veneer for their real needs to be included and accepted can be a true revelation – and lead to dramatically improved working relationships (See *Case study 8, page 27*).

### Teams

It is relatively easy to build good teams within departments, but increasingly companies need multi-functional or project teams to drive organisational initiatives and this creates new challenges. Teams of similar people tend to get on well at first, and they will agree with one another easily, but over time, their decision-making can become flawed: what psychologists refer to as 'group think'. So, more diverse teams are needed, with the additional benefit that participants bring different functional knowledge. Though more effort is required to get the team working effectively, this will pay dividends eventually in more effective decisions (See *table, page 19, for the pros and cons of using psychometric tests for people decisions*).

The pros and cons of using psychometric tests for people decisions

Purpose/context	Pro	Con
Sift in/select out	Cost-effective, more accurate than most methods, and fast; ability tests are face valid for candidate.	You may miss some 'false negatives' (see page 15).
Selecting	Objective, accurate and predictive.	Not to be used in isolation.
Understanding how best to motivate individuals	Offers deep insight into others' preferences and needs, as well as what will de-motivate them.	Requires some understanding of own style and preferences; care needed not to adopt 'formulaic approach'.
Development	Provides self-awareness and understanding of impact on others as platform for change.	Does not guarantee that individual will want to develop. Quality of feedback is critically important, along with support to achieve change.
On-boarding	Helps hiring manager get to know individual and set him/her up for success.	May invite preconceptions about individual in unskilled hands.
Stress management	Helps understand stressors and how best to manage them for each individual.	Misinterpretation is a potential risk in untrained hands.
Organisational change/development/redesign	Helps fit right people in right roles with appropriate performance expectations.	Not to be used in isolation.
Career counselling and outplacement	Provides robust, face valid platform for thinking about satisfying career paths and new options.	Not ethical to use psychometrics alone to support redundancy decisions.
Building and maintaining diversity	Helps ensure different strengths and styles are acknowledged and appreciated.	Should not be used to 'label' people.
International/multinational selection/assessment/development	International norms help ensure that like is being compared with like.	Ensure that those completing assessments do so in their own language. Can be difficult to balance need for local operation's cultural fit with whole organisation's global requirements 'template'.
Teams	Helps accelerate mutual understanding and collaborative use of everyone's strengths.	Revealing differences is just the starting point; finding ways of working and identifying common goals are key.
Conflict resolution/mediation	Helps build trust and openness about needs and styles; exposes parties to alternative approaches vs situation.	Will to resolve and work on finding common ground still needed.
Survivor syndrome	Catalyses discussion about needs and emotions underlying resistance to change and impeding ability to move on.	No substitute for management communication around vision, purpose and goals in times of change.
Performance problems/remedial coaching	Helps unlock personal barriers or resistance to change, and target development areas very specifically. Can identify the underlying causes of performance problems.	Should be supported by other diagnostics such as 360-degree feedback to help individual see impact of behaviour and generate buy-in.

How teams form is a well documented process and developing teams will go through a series of stages: forming, storming, norming and, ultimately, performing, at which point the team has a shared vision, is able to work towards achieving its goals, and also to attend to relationship, style and process issues along the way (see [www.www.businessballs.com/tuckmanformingstormingnormingperforming.htm](http://www.www.businessballs.com/tuckmanformingstormingnormingperforming.htm) for more). Psychometrics such as the MBTI, FIRO-B or 16PF allow you to look at the personality differences within a team at any point in this process. Differences in our personality affect what information we trust, how we communicate, how we make decisions, deal with change and even what we are likely to want from a team itself. Knowing these things helps each member better 'manage' and support the others.

Most work teams function adequately: they meet the organisation's requirements and do what they are supposed to. However, some teams manage to reach a differentially higher level of performance. It is important to accept that investment is required to move from an average to a high-performing team. This process is rarely easy, even with support, and can involve facing uncomfortable truths, and changing how team members view themselves, one another and the team. Becoming a high performing team means changing behaviour – never a completely comfortable experience.

OPP research has highlighted the following eight characteristics of high performing teams:

- **trust** – team members understand and trust one another;
- **diversity** – team members recognise and work with differences in culture, gender, ethnicity;
- **challenge** – the team deals effectively with disagreement and is able to harness different ideas;
- **cohesion** – team members provide one another with the support they require;
- **learning** – a great team is one that constantly looks to develop and improve;
- **decision making** – the team has appropriate methods to make decisions and to commit to the outcomes;
- **accountability** – the management of performance and commitment becomes the role of the whole team; and
- **results** – they are focused on their joint goals and seek to improve performance.

Psychometrics like the MBTI can help a team explore and develop in these areas by providing a deeper level of understanding of the strengths that each individual brings to the team. The FIRO-B can be particularly useful in providing information on what team members need from one another. Teams can then measure and track their performance against these criteria (see *Case study 7, below*).

### Case study 7 Developing teams

A leading banking and financial services organisation has been working with the MBTI for over 10 years, and a number of its learning and development professionals are qualified through OPP to use the tool.

This means that they can design workshops specifically to address the immediate challenges the business is facing, mindful of organisational context, vocabulary and any current issues. The MBTI is used to get teams to work together more effectively - whether newly-formed or established groups that are facing some sort of challenge - and for one-to-one coaching.

In the workshops, individuals complete the assessment, receive their own feedback and then share their 'Type' profile with others. Differences and their implications are discussed. For coaching purposes, individuals receive more in-depth one-to-one feedback and explore the implications of their type for their leadership style, relationships and career development.

The organisation uses the 'common language' the tool provides to discuss differences and preferences in a constructive and mutually accepting way. The organisation chose it because it enables them to build on peoples' strengths and preferences, rather than measure or judge skills or ability, ensuring a positive learning experience.

Over the next three pages we have presented a table showing the best instrument to use when addressing different business issues, and the resulting benefits. The table is split into two parts: 'Selection' and 'Development'. Selection deals with the various instruments available when deciding on how to fill specific roles within a business. Development presents the appropriate instruments for developing characteristics within teams or individuals, according to the needs of the business.

**Finding the right tool – Selection**

Application	Business issue/need	Business benefit	Instruments
General selection	Sifting out the wheat (those who really bring the right skills and attributes to the job AND the organisation, long term) from the chaff (those with great CVs and good interview skills).	Recruit the right person to the right job. Avoid costly financial implications of bad hire. Bridging transition between selection and bringing candidate into the organisation with a good understanding of their motivational and development needs.	16PF Competency or Practitioner Report, ABLE (see footnote on page 20), CPI, FIRO-B, OPQ, Wave, role plays/presentations or full assessment centres if resources permit.
Graduate selection	Variable quality of applicants and potentially unmanageable volumes. Investment in graduate training/development means you need to hire for retention and long term 'fit'. Need to assess potential for more senior roles after first position.	Select for organisational fit. Select for leadership potential vs current job alone. Keep cost of selection process as low as possible. Ensure that only the best take managers' interviewing time as part of selection process.	16PF Competency Report, ABLE, FIRO-B, OPQ, Wave, assessment centres.
Managerial/professional selection	Difference in performance between average performer and high quality applicants; personality becomes more important in complex/senior roles. Need to check 'suitability' (will do job) versus eligibility (can do job).	Recruiting the wrong person at senior level can impact strategy execution, culture and senior team performance. The right person can adapt to be operational more quickly. Understanding the 'team matrix' (ie how personalities fit together and complement one another) in executive team is key.	16PF Practitioner Report, ABLE, CPI, FIRO-B, business simulations, assessment centres featuring business simulations.
Customer support/call centre selection	Turnover/retention. Customer focused staff hard to identify. Search for integrity. Check for motivation for role.	Improved customer service levels and more opportunities to cross-and up-sell due to longevity/deeper product knowledge in the team. Less management time consumed in hiring.	All personality tools except type measures such as MBTI. ABLE (Helpline and Vetting Applications exercise), role plays.
Manufacturing selection	Conscientiousness/integrity/reliability.	Minimise HR costs of operation.	ABLE (Fault Identification exercise).
Administration and clerical selection	Need to check for conscientiousness/reliability. Need to investigate planning and organising skills.	Increased productivity and low 'cost of management'. Efficiency in the team and ensures that the right work is done at the right level.	General ability tests, 16PF Interpretive Report, ABLE.
Selecting for resilience (coping with stress)	Organisation under pressure or in state of flux; people leaving, difficult and busy jobs.	Those who can manage pressure well have a contagious effect on those around them (and vice versa).	16PF Practitioner Report, business simulations, CPI.
Readiness for promotion to management role/leadership transitions	Is your greatest sales person or most talented analyst the best person to lead the team? Do they have the right motivation? Are they ready for a bigger role?	Increase the individual's selfawareness. Secure individual's buy-in to development plan and goals. Helps the organisation manage the risk of transition (when many people fail without support).	16PF Practitioner or Management Potential Report, assessment/development centres.

### Finding the right tool – Development 1

Application	Business issue/need	Business benefit	Instruments
Team building (general)	Dysfunctional teams; conflict between and within teams; turf wars and silo mentality.	Improved engagement. Increased productivity. Improved retention and loyalty.	Belbin, FIRO-B, MBTI, MBTI Team Report, 360-degree feedback tool such as SKILLSCOPE. TKI.
Team building (senior teams)	Dysfunctional teams; conflict between and within teams at a higher level.	Identify organisational focus and align senior team around it so that they speak with 'one voice'. Ensure better quality, faster decisionmaking. Ensure mutual support with constructive challenge which makes for good governance.	16PF, 360-degree feedback tool such as Benchmarks. FIRO-B, MBTI, MBTI Team Report, 'strategic alignment' using MBTI at organisational level. MBTI Step II to build better relationships. TKI.
Managing conflict	Reduced performance due to disagreements which disrupt the flow of work within and between teams. Individual upset and stress.	Increased productivity. Increased discretionary effort from employees. Improved management skill in identifying sources and triggers of conflict and intervening early.	FIRO-B, MBTI, TKI.
Managing stress	Individual performance issues or sickness absence. Need to build organisational resilience. Need to offer counselling around outcomes of chronic stress.	Increased productivity and organisational focus. Improved individual performance. Reduced sickness absence. Ethical response/adherence to legal obligations supporting individuals through stress.	16PF Practitioner Report, MBTI Step I and Step II, State-Trait Anxiety Inventory (STAI/STAIC). Use Maslach Burnout Inventory (MBI) after stress.
Leadership	Patchy leadership skills and inconsistent understanding of expected behaviours. Ineffective nurturing and development of leadership talent resulting in talent poaching. Underperforming leadership teams. Leadership failing to adapt to the environment.	Knowing their own strengths and weaknesses enables leaders to develop an authentic leadership style, leading to less stress and better talent retention. Targeting investment at individual development needs gives better ROI on training spend. Improved employer brand (being known as a company that develops its leaders) helps attract good talent.	16PF Leadership Report, 16PF Practitioner Report, Benchmarks 360-degree feedback, CPI Leadership Report, FIRO-B supports coaching around leadership challenges, FIRO-B Leadership Report, MBTI Step II, MBTI Consultancy Report, MBTI Leadership Report, Business simulations.
Creativity	Lack of innovation in individual and team behaviours. Repeated unproductive work patterns or negative project outcomes.	More innovative approach to solutions generation. Strengthened competitive edge. Stronger employee engagement.	16PF, CPI, Innovation Potential Indicator (IPI), MBTI 'zig zag' decision making model.
General personal development	Poor communications. High levels of workplace dissatisfaction. Repeated negative behaviours and destructive working patterns. High employee turnover.	Enhanced organisational communications and collaboration. Improved employee and customer satisfaction.	16PF, CPI, FIRO-B, MBTI Step I and Step II.

**Finding the right tool – Development 2**

Application	Business issue/need	Business benefit	Instruments
Organisational change/ development	Difficulty coping with change, and embracing and promoting 'the new order'. Need to develop and implement a change strategy for organisation and/or teams.	Change that is effectively managed and measured. Hearts and minds of employees won to secure active participation in change process. Competitive advantage. Adaptability to new market conditions.	16PF, ABLE* to check adaptability to working environment and intellectual ability to assimilate change. CPP – OCI Organisational Character Index, and MBTI.
Career counselling and outplacement (for redundancy)	Need to advise individuals on career choice, development and change. Need to help individual to cope with redundancy/ outplacement.	Ensure good people are retained in alternative roles, rather than lost to new career field elsewhere. Maintain employer brand and corporate values in difficult downsizing and re-structuring situations or post M&A.	16PF Career Development Report, MBTI Career report, STRONG Interest Inventory.
Coaching	Individual needing support through transition to new role. Remedial support to address performance, team and leadership issues.	Individual is retained as higher performer. Individual stretched to accomplish ambitious goals. Individual's team benefits from better leadership. Improved individual resilience under pressure.	16PF, Benchmarks 360-degree feedback, CPI, FIRO-B or MBTI Step I and Step II.
Communication and influencing	Cross-functional teams are not delivering results. Nothing happens without 'position power' and recourse to authority.	Greater understanding of needs and interests of other departments/stakeholders. More win/win solutions to business challenges. More performance targets are met.	FIRO-B (particularly good for identifying likely sources of incompatibility or conflict), MBTI and TKI.
Group profiling/ talent audit	Need to understand capability of team to handle new challenges or execute new strategy. Resource planning – understanding what imminent and future hiring needs are.	Identify and address team strengths and weaknesses. Better audit of talent and gaps against which external hires are needed. Better strategic alignment of skills with organisational goals.	16PF Profile or Competency Reports, Benchmarks 360-degree feedback, MBTI Step II.

\* The ABLE Series includes 10 different ability tests suitable for a range of job roles. Each assessment is based on real-life scenarios and measures an individual's potential to learn a given task, succeed quickly in a particular job and adapt to changing work environments.

# Managing yourself

*As well as exploring the traits of others, it is important that we understand ourselves and how we work as individuals. In this section we explain how this understanding can benefit your career.*

## Understanding yourself

We get to know ourselves throughout our lives; by experiencing a range of different situations and people we come to understand what we like and don't like. We generally expect people who have experienced more of life to know themselves better, but psychometrics can offer a shortcut to this process, allowing us to explore ourselves using scientifically developed tools.

Psychometrics also provide a common language, a structure and a yardstick with which to describe our likes and dislikes, our values and our personalities. In developing beyond technical competence within the finance function, the framework and terminology of a psychometric such as the MBTI can help people to explore themselves easily and openly, supporting clearer communication and greater understanding.

## Shaping your career

Very few of us now expect to, or do, work for the same organisation for most of our life, but rather, several different employers in the course of our career. This means that it is unrealistic for us to expect our organisation to map out our career decisions for us and ownership for this has therefore shifted to the individual. People increasingly use psychometrics to support them in understanding who they are, what they can do today and what they may be able to do in the future – and what will give them greatest satisfaction in the process.

This does not mean that organisational talent initiatives and fast-track programmes are not

valuable; they can be hugely productive. But it can be limiting to see them as the only way to progress since they typically reflect how far an individual's skills and experience are aligned with a particular organisation at a specific stage in its evolution. (In fact, a great many fast-track development programmes will feature psychometrics to provide a deeper level of insight).

Instruments such as the 16PF, MBTI and STRONG offer expert reports which speak to career choice and development from the perspective of what your personality and preferences best suit you to do. Used by a career coach, they can help you see where your true motivations as well as your learned skills could take you. It is a radical notion for many of us to choose a life path based on what we enjoy, but much psychological research about what keeps people happy, well and successful in their jobs shows that this is a key determinant.

## Do you need to be in a role appropriate to you in order to thrive?

There are three key considerations here:

- interests;
- fit; and
- capability.

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Most psychologists would agree that an individual will be happier if the work that they do interests them. We will of course be more motivated to work harder at work we find interesting, which will increase our willingness to learn and to apply our capabilities to the problem at hand.

Our degree of fit refers to whether our personality is well suited to the task at hand. For example if you enjoy freedom and spontaneity, then a steady, conservative role may not suit you. Some performance problems can, ultimately, come down to this. However, with this in mind, if they can make it work the 'odd-one-out' can be the employee who adds something different to their team.

Finally our skills come into play. In general we tend to find that we are better at things we find interesting. Many believe this is because we have done more of these sorts of tasks when we were growing up and so developed skill in them. For example, if I read voraciously as a child, I am likely to have developed my skills at assimilating and analysing information more than those who never opened a book. However, there do appear to be some limits to this: no matter how much I enjoy singing, I will never be any good at it. Talent counts for something!

So, finding an appropriate role is about finding work where your interests, personality fit and skills all converge. But remember, this will not always be the same as the mixture of interests, fit and abilities that have brought other people to the same role, and diversity tends to bring strength in the long-term. Instruments like the MBTI (the careers report), the 16PF (the career development report) and the 'STRONG Interest Inventory' are extremely powerful ways to help maximise the chances of a match.

### Developing your leadership skills

In this context, data from the 16PF or the MBTI can be used to look at the leadership style that an individual is likely to take, with their associated strengths and pitfalls. This information can be relevant in a number of ways: it can affect what we look for in a leader, for example. Our reaction to our leader will be different depending upon what is important to us. If one person seeks a visionary leader and another is looking for a leader who will get their hands dirty and lead from the front then they may not both be satisfied by the same person.

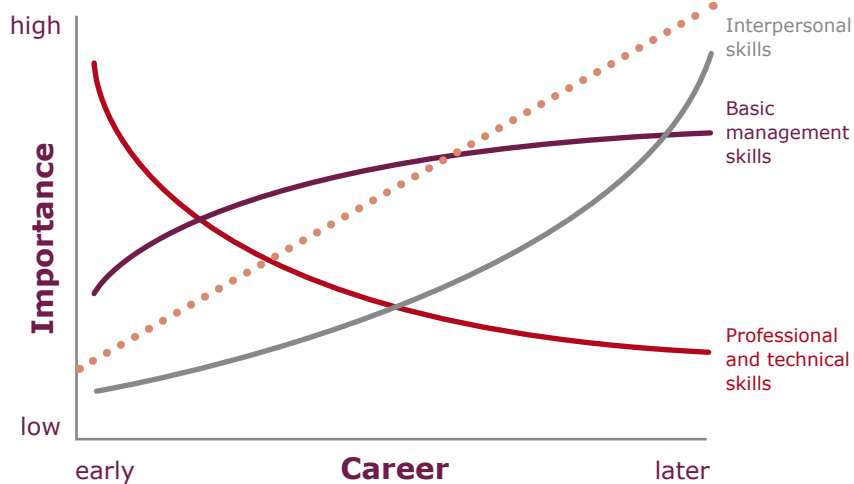
As second area of impact is that our personality will affect the type of leader that we become (see earlier allusions to 'authentic leadership'). Psychometrics can help you explore and make best use of the characteristics that you may need at different points in your career.

The capabilities which are important in the early parts of your career such as professional and technical skills (which are often closely related to your intellectual skills) become proportionally less important in later stages. Intelligence still counts, as discussed earlier, but other aspects become more important. Basic people management and interpersonal skills become critically necessary as you move from a technical expert to a manager of experts or manager of managers. There is, of course, a clear link between personality and these skills.

So, by understanding yourself early in your career you can see what might come easily to you as you progress, what may be more of a challenge, and what 'de-railers' might threaten your success. For example, a person who is good at working with numbers and a highly conscientious perfectionist may secure a good role and achieve highly in it. As a result, they find themselves promoted to managing others, and their interpersonal skills become more important. Unless they have learnt how to communicate and empathise with different sorts of people, how to provide clear and meaningful feedback and how to motivate others then they will find this phase of their career difficult and stressful. Their tendency to demand too much of subordinates without providing support and expect unrealistic levels of dedication may cause them, eventually, to stall. This vicious cycle can be prevented with a little early career self-insight and a sustained commitment to deepening it – and acting on the results (see Figure 1, page 26).

psychometrics  
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Figure 1 – Self insight and career progression



Advantages to self of psychometrics

### How much is it possible to change?

It is possible for people to achieve quite dramatic change in their behaviour under the right circumstances, although for most people lasting change tends to involve a more modest shift.

There are a number of key catalysts to change such as this. First, an individual is only going to change as much as they want to. Wanting to change involves really desiring to be different to how you are now (it is not enough to simply want other people to change!). Second, you need a certain degree of self-awareness: understanding who you are and how you work. Third, the effectiveness of these 'internal catalysts' of motivation to change and self-awareness is affected by the external environment, and the degree to which new ways of being and behaving are rewarded.

The extent to which we have developmental opportunities and are supported through them will affect the degree to which we are able to change. This is why it is key that your manager engages with your development and helps 'make it stick' – and why many HR professionals are increasingly interested in measuring training outcomes, to provide some 'process tension'.

It is worth bearing mind that no matter how significant the changes we make, for the vast majority of us, the person we are as an adult is likely to be very similar to the person we will continue to be – but, through self-awareness, we

can learn to 'manage' our perceived weaknesses and capitalise on our strengths and gifts.

### Coping with organisational change

It can be very valuable to have an insight into your own drivers, values and strongest personal needs when facing a change situation at work. Tools such as the FIRO-B are extremely helpful here as they enable you to understand what you need to be happy and fulfilled in the context of your relationships at work - including how you are treated by your boss.

You may find, for example, that recent organisational changes have resulted in your spending less time with groups and more working solo on projects. If you have a high need to be included and involved in collaborative work, this will be dissatisfying for you at best, and at worst, a gnawing issue. Understanding that this is the source of your discontent means that you can take steps to explore and remedy the issue with colleagues and your manager.

Resisting change is a common reaction when the communication around it has not been expressed in a way that is resonant for you. Knowing your MBTI type is really helpful here because it helps you articulate what's missing in the communication. If, say, you have a preference for Feeling over Thinking, and all you have been offered is logic and business rationale, you can explore with colleagues how will this affect your team's working style, or how to maintain morale as the change unfolds. Likewise,

those with an Intuiting style will be left cold by project plans and milestones, and need to establish overall purpose and vision before wholly buying in.

In times of flux, your relationship with your boss is typically loaded with additional significance because he or she - as well as other managers and senior leaders - is the present embodiment of the organisation's values and beliefs. Psychometrics such as the MBTI can help you understand how you like to work best - and what you value - and whether organisational change has created a need for you to change the way you operate - providing what the organisation values.

For example, in leaner times, planning and conscientious resource management become more important - and are behaviours more likely to be

re-inforced by managers - than generating multiple options; decisive action, more important than ideas and possibilities. If you know that these are now areas into which you need to put more effort in your daily work because they are not your natural strong suit, you can handle the change more effectively.

In general terms, an individual's tolerance of ambiguity, openness to change and own emotional resources are key to how stressful their experience of change may be. Tests such as the 16PF can enable exploration of these facets in a very precise and detailed way, so that you and your manager are better prepared both for how stress symptoms will surface, and how best to manage them.

### Case study 8 Leadership transitions

This global financial services company wanted to find a new approach to develop leadership skills for its experienced managers, both to engage them in their own personal development and encourage learning outside of a development programme. As in many large organisations, and particularly with managers from a technical background, they received regular feedback on their business results but rarely received detailed feedback on how they managed people. The organisation had already successfully used business simulations to develop talent at more senior levels and felt they could be beneficial here to develop future senior leaders.

Honest and direct feedback about the leaders' approach had to be a central part of the programme, so that they could learn about their strengths and blindspots. It was particularly important for delegates to develop an authentic style of leadership, which would allow them to make the most of their natural style and individual strengths rather than taking a 'one size fits all' approach.

OPP worked closely with the group to design and deliver a programme that would expose delegates to leadership challenges that are faced at more senior levels in the organisation. A business simulation was used that reflected the culture and demands of the working environment for senior leaders, drawing on themes such as: working with ambiguity and setting clear direction, resolving operational and strategic issues, and working authentically when faced with competing agendas.

Delegates took on senior management roles in the business simulation and ran the fictional

organisation for a day. An OPP consultant worked with each group to provide an external and objective perspective, bring psychological insights to delegates' behaviour and manage the feedback process. Delegates also completed and received feedback on the FIRO-B questionnaire, a personality instrument that helps people to increase awareness of their interpersonal needs and behaviour. This enabled them to understand how they may be perceived as a leader and how their underlying interpersonal needs influenced their leadership behaviour. In the final part of the programme, delegates participated in peer coaching sets to draw together learning from the business simulation, feedback from other delegates and insights from the FIRO-B questionnaire. Delegates worked in small groups with an OPP consultant to plan how to transfer their learning back to work so that it would continue to have an impact.

The individual feedback provided by the programme enabled the leaders to identify how they could drive their own and others' performance at work. Delegates typically embraced the opportunity for transferring learning to the workplace and reported that they left the programme with an understanding of practical ways to apply this learning at work. A year after the launch of the programme, the firm ran a series of focus groups to capture the impact on the business. Many delegates reported that the programme had changed the way they behaved as a leader, and that they now used different approaches with different people which helped them to build more effective work relationships. As a result, the organisation has benefited from growing a cadre of leaders who are quick to learn and adapt to new business challenges.

# Finance roles and psychometrics

*In this section, we explore the stereotypes sometimes associated with people who work within finance, and look at what research and data can actually tell us about these personality types.*

Looking at the distributions of different MBTI types by career field provides some interesting information, and dispels some myths about who is attracted to the finance function.

A common stereotype would say that accountants are all reserved, practical and logical people who take a planned and organised approach to their lives. The data supports this to an extent. MBTI-based research reveals that, in the US, 20% of accountants have the personality type ISTJ – people who might describe themselves in this way. This is more than the general population, though people with ISTJ preferences are the most prevalent of all the 16 personality types, making up about 12% of the general population.

However, we can challenge the notion of finance people being reserved, as the next most popular personality type amongst accountants is ESTJ: logical, planned and practical people (very like an ISTJ), but more outgoing and keen to impose a logical system and order on the world around them. There are only 7% ESTJs in the general population.

Interestingly, ISFJs form 10% of the accountancy population: quiet, friendly, practical and conscientious people with more focus on personal relationships than the ISTJs. This figure is a little below the general population where 14% of people report these preferences.

This sort of information can help with career guidance – those unsure of what they might be suited to can see what kinds of roles people who are like them have taken before. This should be treated with a little caution, as interest and ability

## Case study 9 Career planning

Associates and partners within this professional services firm had historically been evaluated on tangible results, such as chargeable hours. These remain important as a measure of success. However, as the firm began to explore its competitive advantage and how to maintain it, interpersonal skills were recognised as a lever for client retention and business growth because they help secure long term partnerships.

OPP worked closely with the firm to support the development of a capability framework. This meant a clear specification of the skills and attributes needed for success in the firm in the context of these new commercial realities – a template for the future. The next step was to create an assessment experience to measure associates against this, based on the firm's environment and the challenges faced in a partner role. It included a mix of client meetings and coaching role-plays, in-basket exercises and business presentations.

Critically, the 16PF was also used to give participants greater insight into themselves and how others might perceive them. It was essential that they understood and 'owned' the impact of their personality, and consequent behaviours, on others so that they could identify what to do differently to build stronger long term relationships. This insight was incorporated into follow-up training for senior associates to address some of the skills and challenges revealed through this process. Coaching style and approach could also be tuned to the 16PF profiles of individuals, thus making it more effective.

This helped the firm build more effective senior leadership capability – partners who are strong technically, commercially and as managers of others.

do not always go together. Although there are in reality most sorts of people in any role – different people will bring different strengths and particularly enjoy different parts of it – this is helpful insight for early career planning (see *Case study 9, page 28*).

We can use the 16PF to look at the likely fit to certain roles based upon an individual's personality and the requirements of that role (*for example, see Figure 2, below*).

Information like this could be used to support selection of new finance managers, and to allow current finance experts to see which aspects of the manager's role they may find more or less difficult in the future so that they can plan development accordingly.

For example, the person pictured here is likely to find the commercial and strategic aspects of their role easier, will cope with pressure well and be interested in building relationships, within their

team and more broadly around the organisation, and with clients and suppliers. However, they may find it more difficult to ensure that they always have the specific details of projects finalised and that they are acting with consistency and integrity. They may also be too busy driving or results and too focused on commercial opportunities to consider the impact of their behaviour on others. If considering employing this person, you would need to ask them specific interview questions about how they manage these issues.

You would need to probe around the motivation underlying any disregard for others to see if it's a product of their focus being elsewhere or inexperience, as opposed to a lack of understanding of the importance of this in management or organisational life. If employing them, you would need to monitor how they covered off these potential blind-spots – perhaps through delegating key tasks to those who find them easier.

**Figure 2 – Personality and role requirements**

	1	2	3	4	5
<b>Competency</b>	Poor fit	Marginal fit	Acceptable fit	Good fit	Excellent fit
<b>Intellectual</b>					
Analytical problem-solving					
Strategic vision					
Commercial awareness					
<b>Drive and resilience</b>					
Drive for excellent results					
Coping with pressure					
Decision-making					
Reliability					
<b>Interpersonal</b>					
Influencing					
Management of others					
Integrity and respect for others					

# The 10 golden rules of choosing psychometric instruments

*Psychometric instruments are a powerful output of scientific thought and research, therefore it is important to ensure they are used effectively and appropriately. Here we look at the key things to consider when completing a psychometric test.*

While the role of choosing and implementing a psychometric assessment is more likely to sit with an HR colleague than anyone in finance, it is helpful to be able to ask the right questions while the decision is being made and when the assessments are being deployed. Alternatively, you may be asked to complete a psychometric instrument, and are entitled to some assurance of its quality. Here are our suggestions as to some of the key things to consider:

## 1 Decide what you want to achieve

What is it that you are seeking to measure, and to what purpose? This means ensuring that you have the right tool for the job (ie trait-based for selection, rather than type) and that you have the right outputs to support the decision. If you are making a recruitment decision, make sure you know 'what good looks like' (ie have a profile for success in the role). If you wish to make a decision about redundancy, use performance and competency-based data, in conjunction with a psychometric.

if you are making a recruitment decision, make sure you know 'what good looks like'

## 2 Pick the big brands

There are, literally, thousands of so-called psychometrics instruments available via the internet – some free, some open-access, some dreamed up, many plagiarised. Unlike some other purchases where the advantages of buying a brand can be subjective, strong brands in the psychometrics market are almost certainly a guarantee of quality. It means they are well-invested and stewarded, ethically managed, proven and accurate. The leading suppliers in the field, along with OPP, are SHL, Saville Consulting and Kenexa.

## 3 Share the rationale

There is little more de-motivating for an underperforming manager to whom you are offering remedial coaching support than being told he has to take a 'test'. If, on the other hand, you offer a development plan which includes some time spent understanding where he is now, working from his strengths and being aware of any gaps, he may approach the endeavour with energy and enthusiasm. Trained administrators always explain 'the what and the why' of an assessment, and how to complete it, as part of the best practice in which they qualify.

## The 10 golden rules of choosing psychometric instruments

### 4 Maintain confidentiality

Never share an individual's results without letting them know that you intend to do so before they complete the questionnaire – even if their manager requests to see them. The 'contract' set up when the questionnaire is issued must be honoured; in fact, most people will willingly share their results when consulted. Some instruments include scales for traits like 'emotional stability' and 'apprehension'. To untrained eyes, these are inflammatory terms and could undermine an individual's credibility and reputation unless correctly positioned.

### 5 Do not label people

Many companies adopt a psychometric instrument of choice and give all their managers the opportunity to complete it as part of a 'rights of passage' development process. The advantage of this is huge; people have a language in which to talk about themselves and their differences in a really constructive way. (The MBTI works exceptionally well here). However, be careful that as a result of the organisational culture, certain 'types' are not stigmatised as 'less equal', and others as a sure route to management.

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bringing in new blood to  
an established group,  
the insights derived  
from psychometrics  
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of getting to know  
and trust one another

### 6 Train your practitioners

Would you let a colleague from marketing complete your year end accounts and draw up your balance sheet? No more should anyone deploy these tools in ignorance. Psychometric instruments are a powerful output of scientific thought and research. When you allow untrained people to use them, you risk dangerous consequences in staff morale and mutual respect, as well as individual self esteem. The beauty of good training, however, is that once they have completed it, your HR people can apply these tools in your organisation to a vast range of recruitment and development needs and deliver substantial value very cost-effectively.

### 7 Offer feedback

The authors of the MBTI, Isabel Briggs Myers and Katherine Cook Briggs, insisted that people should be given the opportunity to identify their own type after hearing each preference described, navigating their way towards their 'best fit' through discussion of any discrepancies between this and their reported type. Feedback is therefore embedded in the way this instrument is used. For instruments like the 16PF, there is no such ethical stance, but offering individuals some form of feedback – preferably face-to-face, and at minimum in the form of a report – is good practice. This way, everyone gains from the process and you build your employer brand.

### 8 Apply the 'what next?' challenge

Ideally, psychometric data are always just the starting point. If you see the psychometric questionnaire as a 'diagnostic', then the corollary is some kind of 'treatment'. Even when the 16PF is used in recruitment, we recommend that the results are used to help decide how best to on-board a successful candidate and, subsequently, as the basis for targeted development plans and, even, handling any performance issues. Too often, they are ignored once a hiring decision has been made and the light they have shed on an individual's needs and motivations is allowed to go out.

### 9 Encourage sharing

The 'you show me yours and I'll show you mine' approach provides a fast track to team development. Whether assembling a new team, moving through a change process or bringing in new blood to an established group, the insights derived from psychometrics accelerate the process of getting to know and trust one another. For senior teams, where substantial egos often collide, they are particularly powerful as they can reveal 'the man (or woman) behind the mask' and foster mutual warmth, as well as respect. They can also help such groups understand where their homogeneity may restrict their problem solving or communication style, and flag up their need to involve others with different strengths in some areas of decision-making and execution.

#### Case study 10 Personal development

A telecommunications giant needed to provide developmental feedback to large numbers of potential first-line managers who were finding their new leadership responsibilities challenging. Part of the problem was that they were not clear about what behaviours were expected of them, but they also needed support to address skills gaps.

OPP created a success profile for first-line managers; in other words, a specification of the skills and capabilities needed for success in the management role, in this company, at this point in its evolution. This reflected some of the new business challenges the company faced, as well how, precisely, the skills required of managers differed from those rewarded in individual contributors. The 16PF instrument was then mapped against these skills so that there was a clear link between personality and required management behaviours and skills.

Each manager completed the 16PF questionnaire and received personal feedback to help them understand any individual differences from this success profile. Numerous internal coaches were identified and trained – or 'certified' – to help support managers in 'closing the gap' between this and their current capabilities. As a result, those individuals who were keen to become managers began working on their personal development to be ready for the step-up, sooner.

### 10 Start with yourself

If you are on a career path to management, or senior leadership, and have not yet completed a high quality psychometric instrument and had feedback, consider doing so. Your HR professional should be able to point you in the right direction. In fact, for general self-development, you have much to gain – and enjoy – from such an activity (see *Case study 10, below*). The resonance of what you already know about yourself, combined with the opportunity to think about what you have not yet understood provide a unique platform for continuous improvement in all areas of your life and skillset, and helps you avoid some of the pitfalls that transitions in your life may place in your path.

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'almost sure'  
people decisions  
– aren't enough for you,  
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OPP offers leading personality assessment tools, including the MBTI® Step I, MBTI® Step II, 16PF®, FIRO-B® and TKI instruments.

We also provide psychometric qualification training, including BPS-accredited certification in Level A and Level B, and a range of applications workshops for HR professionals, psychologists and development practitioners.

Our psychologists work with clients to deliver a range of psychology-based solutions in the fields of selection and assessment, team functioning and individual development and coaching. We deliver robust, innovative consultancy services supported by our world-class products and training. The solutions we propose are designed to get to the heart of what drives human performance, so as to effect lasting and positive change for your organisation.

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