



## **Benchmarking Assessment Practices**

Presented at International Assessment Congress  
October 13, 2011

Katherine Holt, Ph.D.  
katherine@peakinsight.com

Paul Bernthal, Ph.D.  
paul.bernthal@ddiworld.com

### **AGENDA**

- 1 Overview & Trends
  - 2 Hiring, Training & Certification
  - 3 Cross-Cultural Assessment
  - 4 Norms, Calibration & Technology
- 

# Benchmarking Survey Firms (n=32)



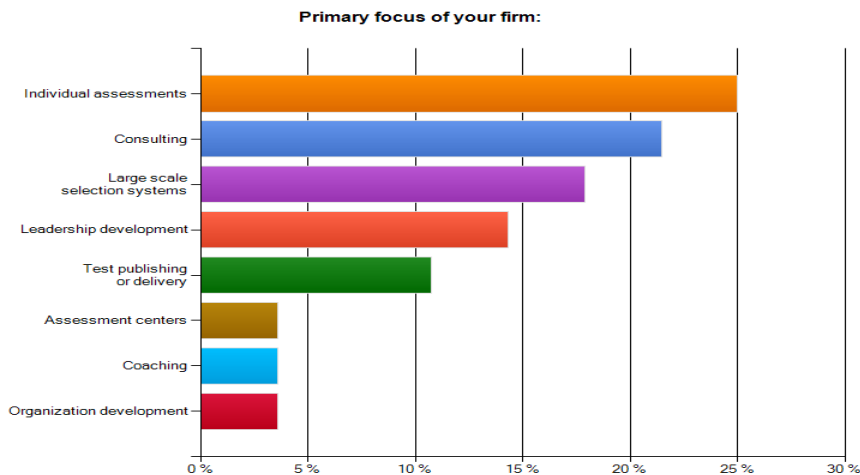
What are the biggest trends in assessment?

Brainstorm for 2 minutes in small groups.

# GLOBAL ASSESSMENT SUMMIT 2010 BENCHMARKING SURVEY

## OVERVIEW & TRENDS

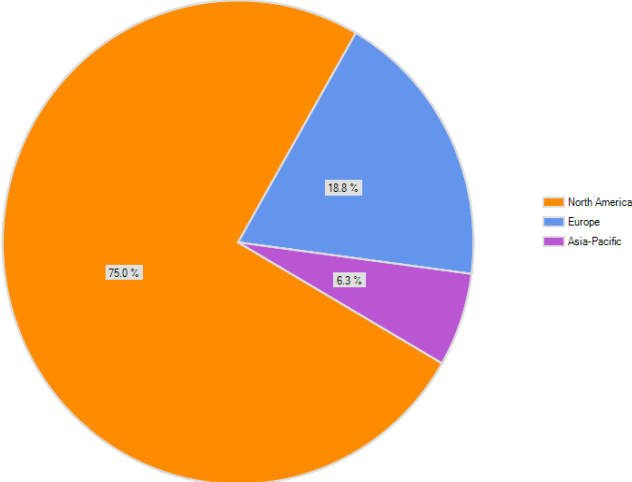
### Primary focus of firm



NOTE: 8 additional firms indicated "Other" – often reporting a mixture of the above areas

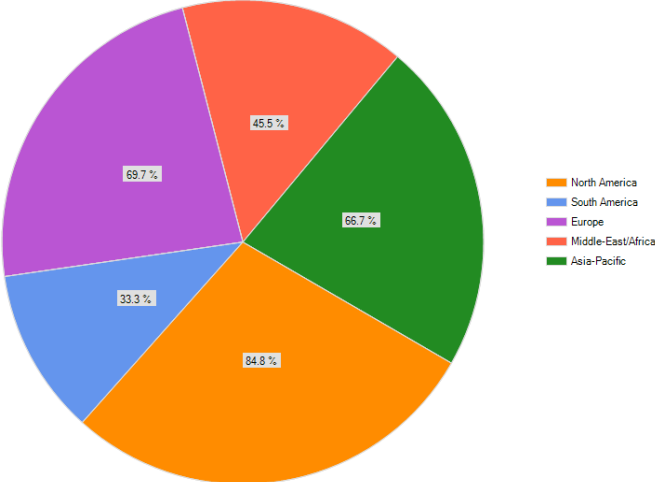
# Corporate headquarter location

Location of corporate headquarters:

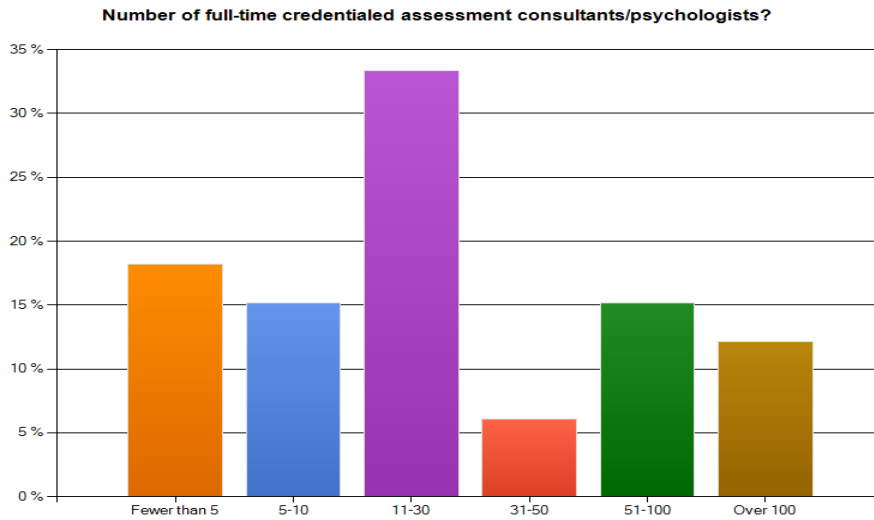


# Regions with offices or presence

Regions with offices or assessment consultant/personnel presence:

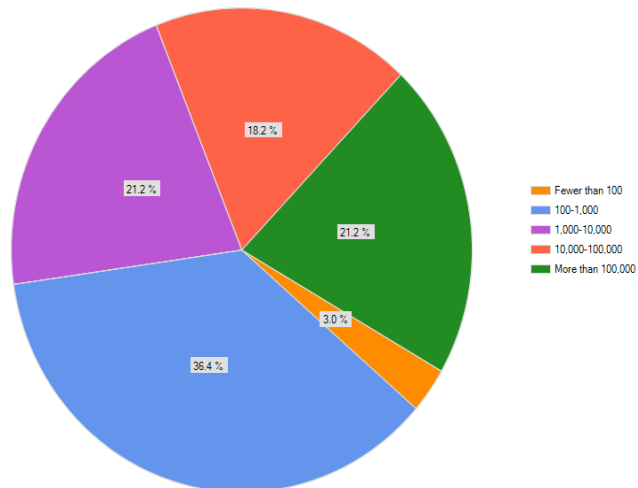


## Full-time assessment consultants/psychologists



## Number of annual assessments

How many assessments does your firm conduct/process annually?



## Trends: 360s

1. **Continued popularity** although process has been compromised by use for performance appraisal
2. **Simpler, faster, cheaper**
3. **Customized** to company competency frameworks



## Trends: Online assessments

1. **Growth:** “online is a must have”
2. **Increased unproctored internet testing** via ATS
3. **Shorter, simpler surveys**
4. **Customization**
5. **More simulations**, moving “to a more personal interactive experience”

**WARNING** about Doomsday ahead?

- “Focus on convenience vs. security”



## Trends: Assessment centers

**Trend may depend on geography:** “Increased interest”  
vs. “stable” (e.g., “over 40% use for mission-critical roles”)  
vs. “Decreased popularity because of time, cost, ROI”

### Meanwhile...

- ❑ Shorter cheaper process, compressed into fewer days
- ❑ Going online (e.g., “moving to virtual gaming”)
- ❑ Remote delivery
- ❑ “Blended and unbundled designs are on the rise”
- ❑ “Greater focus on validity for legal defensibility”



## Trends: Individual assessments

1. **Steady or increased demand** for higher value roles
2. **Downward price pressure** due to online assessments
3. **Requests for benchmarking** to external reference groups
4. **ROI focus**

**SURPRISE:** Only one person mentioned “Linked to executive coaching”

## Trends: Large-scale selection systems

1. **Increased use of technology**
2. **Linkage to SAP/HR analytics**
3. **Opportunities** (“Rapid increase in government settings”)
4. **vs. Challenges** (“Price is becoming commoditized; moving to license model” and “We have developed systems to support this which are not yet selling well”)



## Trends: Cross-cultural assessments

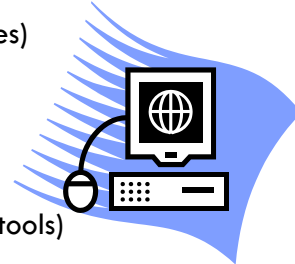
1. **Increased usage**
2. **Multiple challenges, such as:**
  - ❑ Debate over local/global norms, competencies, delivery
  - ❑ Degree to which national culture affects assessment (e.g., is good judgment in US same as in China?)
  - ❑ Need for solid translation and validation
  - ❑ More push for raters from multiple countries and cultures, which is an issue for norm-based scoring



## Trends: Changes in assessment practices

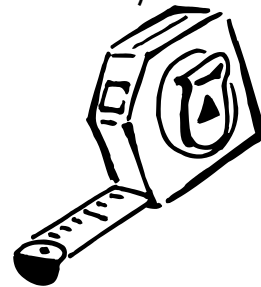
### **Greater use of technology** for

- ❑ On-line delivery (and in multiple languages)
- ❑ Remote assessments
- ❑ Mobile testing
- ❑ Administration
- ❑ Supporting assessors (e.g., report-writing tools)
- ❑ Increased integration between systems
- ❑ Reducing time and cost



## Five elements to be measured in ANY leadership assessment

1. **Cognitive ability** (including judgment & decision-making)
2. **Interpersonal skills/EQ**
3. **Agility** (including strategic dexterity, learning agility, lifetime learning, adaptability, comfort with change, ambiguity tolerance, open-mindedness, resilience)
4. **Drive/motivation**
5. **Leadership skill & style**



## Critical leadership competencies to assess in the future

- ❑ **Mega-agility** (learning agility, adaptability, flexibility, dealing with ambiguity & more)
- ❑ **Cross-cultural sensitivity & global mindset**
- ❑ **Managing information & problems**  
(managing complex problems, early pattern detection, judgment, analysis, creative problem solving & more)
- ❑ **Developing talent**

**GLOBAL ASSESSMENT  
SUMMIT 2010  
BENCHMARKING SURVEY**

**HIRING, TRAINING, AND  
CERTIFICATION**

## Group Poll Question

Which of the following is the most important skill set for AC assessors?

1. Quality orientation and attention to detail
2. Initiative and drive
3. Analysis and judgment
4. Inquisitiveness and learning orientation
5. Sociability and personal sensitivity

What else would you add?

## Top qualities or experiences for conducting assessment

1. Track record of experience in assessment
2. Communication – both written & oral
3. Initiative & drive to complete high quality results on time
4. Observation and behavior categorization
5. Analysis & judgment, including ability to integrate info
6. Degree or training in psychometrics/validation
7. Insight into human behavior – self and other



## Top qualities or experiences for conducting assessment

### NOTE:

(Only) one person mentioned each of the following:

- ❑ Interculturalist
- ❑ Inquisitive
- ❑ Learning ability



## Recruiting and selecting assessment staff & affiliates in other countries

### 1. Networking

### 2. Word of mouth

- ❑ Hire carefully – take your time
- ❑ Use hired psychologists
- ❑ Affiliate relationships with firms conducting similar work
- ❑ May need to adjust criteria – pool of qualified candidates can vary in different locations or countries
- ❑ Willing to adopt a central practice even if it does not align with local practices or preferred approaches



## Training line managers and others to evaluate leadership competency

- ❑ **Some expressed skepticism about this approach, given their experience.**
- ❑ **Many commented about the difficulty/uncertainty involved.**
- ❑ Clearly define measurement criteria for a few (more tangible) competencies and provide measurement practice and feedback
- ❑ Pair line managers with professional assessors



## Global trends in assessment certification

1. **Shorter, just-in-time certification**
2. **More regional** than global
3. **Questioning US-based models**
4. **Varying levels of sophistication** across regions
5. **Challenges around equivalence** across national boundaries
6. **Choosing assessors that are local** to candidates being assessed



## Conducting certification

- Training/Workshops: 1.5, 2, 2.5, 3, or 4-day
  - Depends on the assessment (e.g., interviewers vs. AC assessors)
  - Certification Levels: A or B (level of expertise)
  - Prework and/or self-study
- Practice – practice cases, co-delivery/shadow, live practice
- Quality control and feedback



Models vary depending  
on user education and experience

## Creative learning methods

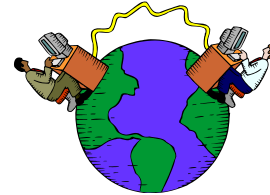
- **Webinars** – very common for simple information sharing
- Teleconferences - one-on-one for experienced consultants
- Interactive online training – using complex features of WebEx or similar systems.
- Video modeling – watching another assessor
- Monitoring – Observe and supervise a learner delivering the entire assessment process in real time

What other creative or new methods  
have you seen?



## Mobilizing a global certification network

1. **No** – Some do not use at all (keep local)
2. **Yes**, how?
  - ❑ Onsite certification (travel to location)
  - ❑ Master trainers – can train others
  - ❑ Hire partner consultants to conduct certification workshops
  - ❑ Global network of senior professionals to serve shared clients



What challenges do you face when certifying assessors in other locations?

**GLOBAL ASSESSMENT  
SUMMIT 2010  
BENCHMARKING SURVEY**

**CROSS-CULTURAL  
ASSESSMENT**



What is your biggest challenge in conducting assessments in different cultures?

Share for 2 minutes with a partner.

## Critical challenges in conducting assessments in different cultures

1. Technology infrastructure
2. Localization & proper validation
3. Cultural bias in standards & interpretation
4. Test security & confidentiality
5. Data privacy
6. IP protection





## Possible solutions for conducting assessments in different cultures

- ❑ Position carefully and manage tightly
- ❑ Handle case-by-case
- ❑ Local input and support
- ❑ Data monitoring
- ❑ Parallel forms
- ❑ Web-based scoring for paper & pencil tests



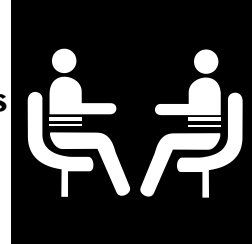
## Tips for language translations

- ❑ Find good translators and put in sufficient quality checks
- ❑ Use standard procedures (e.g., back translation)
- ❑ Find questions that work in multiple languages
- ❑ Must localize the concepts, scales, and items
- ❑ Have the client translate to minimize impact
- ❑ Get everyone to agree on the translation
- ❑ Get/analyze an adequate sample to confirm equivalence
- ❑ Validate translations through content evaluation and statistical measurement



## How we are measuring cultural intelligence and/or global mindset

1. **Interviews**
2. **Specialized psychometric instruments**
3. **Local partner resources**
4. **Role-play simulations**



As well as...

- ❑ “We define the competency and build assessments to measure it”
- ❑ “We’re still sorting that out”

**GLOBAL ASSESSMENT  
SUMMIT 2010  
BENCHMARKING SURVEY**

**NORMS & CALIBRATION**

## Role of external benchmarking

### PRO:

- Clients frequently want to know how they compare to others.
- Clients use benchmarking data in the sales cycle as a decision criteria.
- A low/high score might not mean anything if everyone scores that way.

### CON:

- It looks valuable but is hard to interpret – every company is different with different influences in play.
- Distracts/clouds the issue of where to focus attention.
- Why copy the structure of another organization?



## Group Poll Question

For leader level assessments, do you generally prefer to present norm/benchmarking data as part of the feedback model?

- Yes
- No

## Differing interpretive guidelines or standards/criteria

- Country, culture or language don't affect assessment results empirically – no need to adjust scoring.
- Focus on providing a company norm/average, which is stronger than culture.
- Might use or not use norms depending on the client.
- Provide guidelines for interpretation that local assessors can use to adjust within culture.
- Adjust scoring algorithms slightly by country to account for major differences in performance.
- Adjust both content and scoring to fit the culture.

## Calibrating assessments for same client across consultants or geographies



- 1. Group training – share perspectives**
- 2. Calibrate on shared video samples**
- 3. Incorporate as much practice, discussion, and feedback as possible**

Examples:

- Regular calibration meetings or exercises (lead assessor or assessors)
- Lead assessors monitor deviations and provide feedback
- Ongoing reliability and quality control checks
- Monitor distributions by location to monitor major differences
- Double scoring on selected projects (e.g., new content, critical clients)

## Calibrating assessments for same client across consultants or geographies

Standardization of practices is difficult in itself, but then you must explain differences in culture, assessment practices and other complex issues in places like Lake Wobegon.



Lake Wobegon:

“Where all the women are strong, all the men are good looking, and all the children are above average.”

## Group Poll Question

**When delivering an assessment involving participants from multiple countries for a single client, which practice do you think is most common?**

**COUNTRY STANDARD** – excellence in one country does not necessarily imply the same level or set of skills as it might in another country (i.e., full incorporation of cultural differences in approach/style)

**BLENDED STANDARD** – there is a core set behaviors/competencies that are adjusted somewhat to recognize cultural differences.

**GLOBAL STANDARD** – all participants are held to the same rating standards (i.e., all participants are expected to show the same approach/style regardless of their culture)

## Approaches for calibrating assessment rating standards

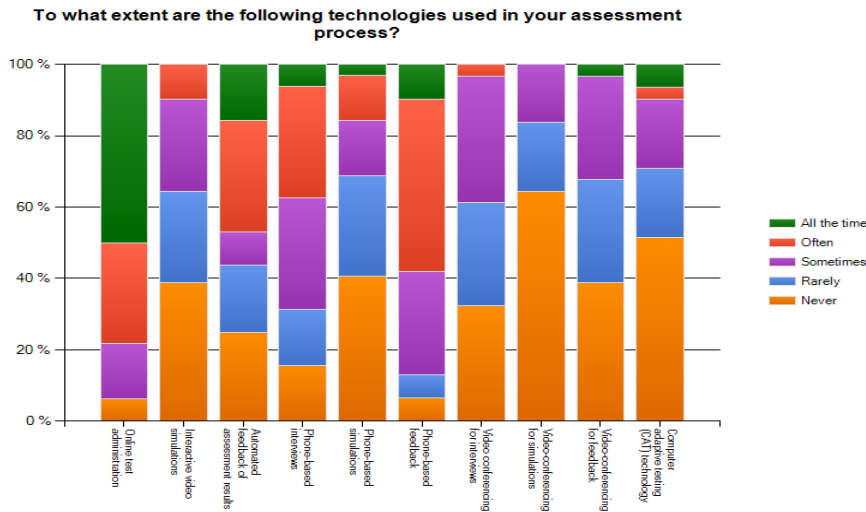
When delivering an assessment involving participants from multiple countries for a single client, how common are the following approaches for calibrating assessment rating standards? Please allocate 100 points across the three categories to indicate how frequently each approach is used.

- 18.5 COUNTRY STANDARD** – excellence in one country does not necessarily imply the same level or set of skills as it might in another country (i.e., full incorporation of cultural differences in approach/style)
- 35.9 BLENDED STANDARD** – there is a core set behaviors/competencies that are adjusted somewhat to recognize cultural differences.
- 45.6 GLOBAL STANDARD** – all participants are held to the same rating standards (i.e., all participants are expected to show the same approach/style regardless of their culture)

## GLOBAL ASSESSMENT SUMMIT 2010 BENCHMARKING SURVEY

### USE OF TECHNOLOGY

# Use of various technologies



## Technology use differing by level of the assessment participant

- ❑ **It doesn't**
- ❑ Differs more by client capabilities or sophistication, not participant level
- ❑ Technology can facilitate assessments of high volume positions (e.g., initial screening)
- ❑ Less complex technology (e.g., phone) favored at lower levels
- ❑ More face-to-face at higher levels
- ❑ More sophisticated technology at higher levels
- ❑ Depends on savvy of candidates and/or face validity of the assessment

## Value of technology to improve assessments

- Consistency of administration
- Unified presentation of assessment process and development follow-up (all one system)
- Ongoing dynamic flow of responses to question (allows monitoring trends; testing new items; assessing quality of content)
- Feedback on what the user is doing (tracking behavior/clicks)
- Immediate delivery of feedback
- Dynamic/seamless norm updates
- Configurability of reports
- Facilitates presentation of AV content
- Higher fidelity – closer to actual work, video improves realism)
- Self schedule assessment – more convenient, quick access for remote assessments

## Group Poll Question

What percent of clients require online assessments as part of an assessment solution?

- 0-25%
- 26-50%
- 51-75%
- 76-100%



## What percent of clients require online assessments?

- ❑ **Median response was 90%**
- ❑ Responses ranged from 0-100%
- ❑ Geography not a factor except for places with connectivity issues

## Managing variations in technology infrastructure

- ❑ **Handle on case-by-case basis**
- ❑ Develop low-bandwidth solutions (lowest common denominator)
- ❑ Use an IT group or external partner to check and address issues/problems
- ❑ Keep it simple
- ❑ Pre-test before implementation (e.g. connectivity testing)
- ❑ Conform to current W3C global accessibility standards

