Assessment with Intention

Assessments can help create a wonderful portfolio of insights or cacophonous and destructive message that does more harm and good. It is no accident that publications in the popular press are ardently opposed to assessment tools as the recipients of the reports feel misunderstood or even disempowered to deal with their growth and development. So if you want to make beautiful "insight" music with the use of assessments, I would encourage you to keep a few things in mind.

A well designed and empirically sound assessment can provide a report that efficiently organizes a great deal of information. Excellent tools promote deeper understanding that encourages insight and learning.   When thinking about the use of a variety of tools, consider the following:

(a) What is the goal for using a particular selected assessment? Is it simply awareness or is it a deeper look at behavior for the purpose of personal change? If it is awareness, then a checklist of behaviors is sufficient. If a deep look at behavior is the goal, then a few more issues as outlined below become important.

(b) Are the tools you are going to use covering the territory? If a deep look at behavior is the goal within the context of personal development, professional growth, enhanced effectiveness, etc., then it is important to look at using several tools that cover the forces affecting and sources of behavior. For example, if you are working to help an individual communicate more effectively, then a number of tools are going to be useful---not just one instrument like the MBTI®, Golden Personality Type Profiler, or Majors Personality Type Indicator (which have the same levels of reliability and validity). I encourage users of assessments to cover the following behavior sources:

   a. Situational factors need to be measured by using structured interviews, a critical events checklist, or questionnaire that provides an understanding of how current factors are influencing behavior. Also, 360 multi-rater tools are often excellent for identifying situational issues or dynamics. For example, if a 360 tool asks raters to identify the behaviors most important for success, then you have a good idea of the relative pressure to address behavioral change.

   b. Learned behaviors can be evaluated through psychometrically sound tools or structured observational methods. Using the example noted above of helping an individual with his or her communication effectiveness, you need know if some of the behaviors that work for and against communication have been learned through work related events and have been persistent for some time.

c. Developmental readiness to learning new behavior or adjusting current behavior is useful to know when working with an individual who wants to deal with complex behavior. Sound assessment tools often have indices of maturity, ego integration, or learning agility which give clues about the degree to which an individual is open to development.

d. Dispositional factors that affect behavior include personality type and trait based tools. It is vital that a thoroughly researched and empirically sound tool is used. I recently asked a Vice President of Development if she would take her sick child to a grocery store clerk for a diagnosis. Of course she said no and how absurd for me to make such a suggestion. I suggested that when poorly empirically supported tools are used, it is the same thing is being thrust on her employees.

(c) How can you evaluate the merit and worth of an assessment or group of assessments? A few criteria is sufficient to aid your evaluation of the merit of a tool. Keep in mind that publishers are going to do everything they can to make a report "look good" and tell you how many happy customers are using their tool. Neither appearance nor the number of customers says very much about the worth of the tool. So when thinking about an assessment, use this list:

- Is there a technical manual that identifies how assessment items were selected, evaluated, and how the instrument was tested for reliability and validity?

- Is there evidence of both internal consistency and test-retest reliability?

- Is there evidence for validity—studies showing correlations with other observations of behavior, analysis of contrasting groups, or data revealing application outcomes when using the tool?

- Can you find research in the professional literature on the tool? Even if the researchers don't like the tool, has the tool achieved enough attention to be reviewed by the professional community? (Often these reviews set an impossible standard for the researcher to be pleased with a tool, but the mere fact that the assessment is being used for on-going studies often suggests that it is an above average assessment.)

I get a hundred announcements each year on assessment tools that I can use in coaching, training, or other leadership development initiatives and I find that when I ask for a technical manual or technical report, the conversation usually ends. I get regular requests to review web sites where assessment tools are "guaranteed" to "predict" performance for $6.95. A little scratching of the surface reveals that these tools are no better than the checklist you could create on a given topic.

Your intention is to provide a supportive and insightful experience for your clients and customers. You want to be associated with providing valuable information that individuals can use. To align your intentions, behaviors, and outcomes, you need to select tools that cover the range of behavior under exploration. The tools that are selected should be psychometrically sound as outlined above. You will find that using personality type with clients and customers is greatly magnified by using a suite of tools that enrich understanding and promote a more holistic view of the behavior under consideration.