

Adapting assessment and development to the changing nature of work

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If you've been on an assessment or development recently, or if you have commissioned consultancies to design one for you, you might be surprised to know that it was most likely based on a model that was designed in the early 1940s for the selection of military officers. Nothing wrong with that in itself, but does the model still apply to today's working environment, in the way we work, communicate and interact with others? We believe it doesn't.

This article highlights the inadequacies of traditional approaches and points to new procedures that meet today's needs, in this important aspect of talent management. It also provides an example of where the proposed new approach has produced startling results which have provided high quality assessment data at a fraction of the cost of traditional approaches.

Traditional centres

By replicating the normal workplace we can reduce the false results

We know traditional centres regularly identify individuals who are judged to be highly capable based on good performance at the centre, but whose performance in the workplace does not match these observations. Indeed, we also know that there are those for whom the opposite is true – very effective in the work place but not at the centres. So – the more we can replicate the normal workplace, or even go beyond that and embed assessment and evaluation within the workplace itself, the more we can reduce the false positives and false negatives.

What are some of the problems with traditional assessment or development centres?

The starting point is in the implication from the name: a 'centre'. This means that all participants, whether attendees, assessors, coaches, facilitators, administrators or centre managers need to be present at the same place at the same time. And this is the norm for centres. The disruption to the business and cost of travel is very high, and frequently provides the barriers to running centres.

Practical considerations dominate ... when the quest should be for valid evidence

Another area of weakness is the exercises in the centre, which are either unrealistic in today's climate, or they are too difficult to assess, or they fail to reflect the way people actually communicate and interact. Mostly, attempts to counter such weaknesses result in the design of exercises where the main criteria are whether they can be completed by the attendees in the time, within the available facilities, and be observed and scored by the assessors.

Typical centres might employ exercises such as a written case study that leads to a group discussion or interview with an assessor; an in tray exercise; a practical group problem-solving exercise; a role play with another person on a 'people' issue; a presentation; a structured interview; or psychometric questionnaires.

In the design of a typical centre, practical considerations dominate the design, when the quest should be for valid evidence.

An example

One striking example of this is the potted business case where attendees have an unrealistically limited time to get into the case and are very quickly expected to hold meaningful group discussions and to produce insightful written analyses. The obvious weakness is that in day-to-day life we don't find out about business situations through a potted case study, which, of necessity, is strongly biased by what the author of the case has decided to put in it.

In reality people make choices from various and conflicting sources, and it is this ability which is key, but not accommodated in a typical centre. In our normal work we decide how we will tackle the issue, we might take some time, we read, interrogate the internet, discuss with others, reflect, re-visit the information and then draw conclusions. We decide what we will read, how we will use it and who we will speak to. Compare this with exercises constrained by the limitations of the practical design, which push attendees towards shallow treatment and points-scoring on aspects of personal style and impact in group discussions. Add to this the immense difficulty for assessors in reading, understanding sufficiently and assessing several written papers (all in the time available), and then discussing and moderating the results, and it becomes clear that the quality of data is likely to be poor, if the object of the exercise is to gather valid data on capability.

But the main inadequacy in the approach is that the traditional centre fails to collect the vital evidence that marks out the excellent performers from the rest in today's world of work. Such capability is more likely to be based around the participant's:

- enquiry skills
- personal networking skills
- ability to fathom out the vital from the plethora of information
- ability to balance the demands of the task with other competing demands
- ability to interact effectively through modern business communication.

Demonstrating capacity through performance in tasks such as these is far more effective than the rather shallow and potted business school exercises. The question is, how do you capture valid data?

What are the requirements?

So what are the requirements of assessment and development in the 21st century? In short, the need to reflect the realities of modern organisational life – this is essential if assessment is to be valid, and if development is to be planned around real-world working.

These days, we rely far more on remote communication across geographic separation. Large organisations have multiple sites, often with a large presence overseas as businesses move towards a global reach. We work far more from home, where electronic communication is the norm. In every role, ways of working involve far more communication by phone than ever. Add to this telephone conference calls that any phone user can arrange. And although we seem to be dependent on email, it only came into wide usage in the last 10 years. Video conferencing is the medium of choice for many international meetings, saving time for participants and cost for their organisations. As structures become flatter, organisations have moved away from hierarchical communication and towards the informal communication networks of the growing occupation of 'knowledge worker'. And when we want things done, we don't compel or control but we influence and encourage.

In all, the way we do our work has changed. It isn't only the means of communication that have developed, the way we lead and want to interact with each other has also changed. If assessment approaches are to keep pace then they need to reflect the changing ways of interaction, and to measure the things that are important, not just the things that can be measured in the way that a traditional centre might be able to measure them.

Is it possible for assessment and development centres to reflect the modern ways of working?

People in IES frequently work with other organisations in a wide range of collaborative projects aimed at improving our knowledge. One such initiative, with the 'Norden Group', met over several months to explore ways in which assessment and development centres might be better designed to meet the needs of organisations in the 21st century. Having coined the title, 'Virtual Assessment Centre', they generated the ideas of how the methods might work. Next they sought a multi-national organisation that was thinking along the same lines or was constrained in assessing people because of the cost of accommodation and travel to a central site. One such organisation was found: an international major

bank (which we will call 'IMB' for the remainder of this article) that needed to assess some of its senior people, globally dispersed, in order to make career and resourcing decisions.

IMB did not have a specific centre for assessing this occupational group, and had experienced limited results using existing UK centres. In addition, because participants would need to travel from all over the world and be accommodated for the period, the costs of mounting a dedicated centre would be extremely high. If you add to this the down time for senior employees, and the need to take the time of senior managers as assessors and mentors, then the overall cost to IMB in real terms would be vast.

Though the cost element was an early driver for the project, the end result was a quality of data unsurpassed by any of IMB's previous approaches to assessment.

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How the Virtual Centre was designed

The essential elements of the Virtual Centre were:

- it must be conducted without participants or assessors having to travel far
- it must be both fair and felt fair
- assessors should have good quality data, regardless of the medium chosen
- exercises must have high face validity
- participants should be given the support they need to show themselves at their best.

The design team used existing competences, which had been well prepared previously and already formed the basis for other career development purposes. The other elements of the design included a case based on a real banking situation, but outside the experience of participants on the programme. However, there was knowledge around the bank about this particular business situation, so participants were able to seek out people who had opinions. Added to this was the appointment of a subject matter expert who could give banking knowledge in this specific area of the bank's operation. This person was not an assessor, their only role was to provide technical knowledge at the end of the phone.

Participants did their own research and had the flexibility to choose when the work was done (so long as it was before a prescribed end date). They could talk to whoever they wanted and could find their own sources of knowledge. The assessment requirement was that

participants kept a log to say who they had contacted, why they had contacted them, what the results were, and where they intended to go next. This gave a rich picture of the thinking, networking and enquiry skills of participants.

Part way through they were given a task which required them to communicate with other participants across geographic territories. The email engine used for the assessment was able to capture all of these transactions,

thereby providing source material to assess how participants went about the task. In addition, a 'Centre

Mentor' from the IMB HR group provided support by being available to clarify process; check on issues that participants were having; brief managers, assessors and participants; and organise training for the assessors.

The first phase of the business case culminated with the participants presenting their findings via a video conference to a (simulated) senior manager. The manager then gave them a new task that they had to solve as a group, and to report back within the hour. This led to a group discussion, more akin to the type of interaction they would need to have with colleagues across the world. After the group reported back to the senior manager, assessors then interviewed participants individually by phone to explore their insight into the meeting process and the business issues that were addressed. Participants were also required to email their written summaries of the meeting the next day, having had time to reflect with adequate recall time, and with time to write considered summaries.

An additional task required participants to conduct an interview with a manager in another territory, using a video link. This gave data on how they handled the interaction in a tricky situation using the medium they would most likely employ, given the circumstances. Professional role players were employed for this task, and assessors observed the process, either live or by watching a recording.

One key element of most assessment centres is the structured interview, where the participant is interviewed against selected criteria, drawn from the organisation's competences. Again, video links not only made this possible, but enabled assessors from any part of the world to conduct the interviews. Because it was possible for one interviewer to interview the participants sequentially across the world, issues of reliability were minimised. Moderation was still possible, because another assessor could review the recording.

Case record

An additional benefit of using email, video link and telephone was that a permanent case record could be produced, and easily made available across the world to those who needed the information. The benefits of this are most apparent when key employment decisions are made on the outcome of the exercise, or when the objective is personal development. If necessary, more than one assessor can witness every exercise live, or can have a taped copy. Even if the assessor is in a different part of the world to the person conducting the interview, they are not constrained by the type or place of the activity. This makes it possible to reduce the number of assessors, and to train them using video and audio tapes to assess in the same way for the same exercise, which in turn contributes a great deal to achieving reliable data.

In addition, the traditional 'wash up' or integration of data can be more readily achieved, since assessors can observe all interactions that they may wish to, without relying on their recall or that of another assessor. They can also use the video conferencing facilities in order to share their discussion.

The IMB response

How did IMB take to this new approach? The details of the evaluation are confidential to the organisation, but it is suffice to say that major decisions about employment were made as a direct consequence of the first 'Virtual Centre', and the cost of running the whole project and

the centre that followed amounted to less than the savings made on travel alone. It is now the preferred way for assessment of this occupational group.

In summary, what are the benefits over traditional centres?

- By pacing the assessment process over a number of weeks instead of the immersive back to back assessment that takes place in traditional centres Virtual Centres provide the time and space for assessors to reflect, develop and test out hypotheses about individuals' capability, competence, aptitude, learning and potential.
- The Virtual Centre has the flexibility to gather additional data in a way that traditional centres (with their strict timetables and choreography) cannot accommodate.
- By building in the option to provide interim feedback to participants Virtual Centres can encourage (and assess) learning and adaptation in a way that traditional centres are unable to achieve.
- Face validity of the centres is increased through more effective replication of today's workplace and work flow.
- Opportunity costs for organisations are significantly reduced as participants spend less time away from work, as do in-company senior management assessors.

How can IES help you in this area?

We have had successful involvement in a major project with IMB, and we have the capacity and capability to design and manage the introduction of a 'Virtual Centre'. Or we can 'virtualise' parts of the development or assessment processes that you have in place, but would like to make more realistic and cost-effective. And we could help you to deconstruct your existing centres and 'virtualise' them.

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About IES

IES is an independent, apolitical, international centre of research and consultancy in human resource issues.

We believe that HR can make a significant impact on the success of organisations of all types. In order to help bring this about, we help organisations:

- decide what they want HR to achieve
- identify what high performing HR people are like
- design and deliver bespoke development programmes for HR people
- evaluate how they are progressing against their goals.