

# Essentials of Sound Executive Assessment

Individual psychological assessment in business is very different from clinical, counseling and educational work. While each of these practice areas draw upon similar professional skills and perspectives, both the context and the content of an executive assessment set it apart.

This brief paper illustrates some of the most important criteria for conducting a successful engagement.

- **Conduct a thorough organizational and job analysis**

Executives judge work success in the framework of both a specific role and, equally important, in how it contributes to the overall health of the business. To properly decide which candidate characteristics to assess, it's critical to examine several levels of information.

First, study the details of the target job. What are the essential duties? Which critical knowledge, skill and personal characteristics does the person need? What kinds and amounts of career experience will best prepare a candidate for success?

Next, what role does this person occupy in the larger organization? Are they a high level decision maker, or a peer or a supporter of major executives? Viewed this way, the candidate's ultimate performance is at least partly determined by how well their efforts mesh with key people.

Lastly, what unique strategic path is this organization on? What are its products and services? Its markets? What are the critical events in its history and who are the central people who have shaped the way it does business?

Understanding these details is a core ingredient in fully judging candidate fit. A decisive, intuitive and fast-acting executive may be ideal for a high-level retail industry role, but she may fail miserably in a methodical, research-oriented business.

- **Develop a cohesive assessment protocol**

Learning about each of the details just mentioned should shape your assessment process. How can you best determine if a candidate meets the job and its role requirements? Who will fit best into the organization's industry and culture? Effective selection systems cover all of the essential information bases. They blend a variety of information sources to develop a rich and full picture of each candidate.

Think about how you can combine your observations with interview questions. Which standardized assessments will help you judge key skills and behavior patterns? How can you get the most from other information sources, such as resumes, comparing notes with other interviewers, and from work samples?

The more carefully you craft your protocol, the more likely it is that you'll fully understand how well each person hits the mark, or misses it.

- **Organize your assessment session carefully**

Executive assessments are often squeezed into a very full schedule. Plan to collect each important piece of intelligence, in proper depth. Arrange enough time to explore the individual's work history and personal background. Prepare to thoroughly discuss relevant examples of their behavior in job-critical situations. Set aside enough time for any standardized assessments you will administer to avoid rushing the candidate. And allocate agenda space to address any questions or concerns a naturally anxious person may have. You shouldn't be sharing any final fit decisions with them, but helping them understand how your input informs the decision will help allay some fears.

Finally, ensure that each candidate hears what information you will report back to the client. Because of your psychological expertise, candidates

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may wonder whether you're secretly charged with diagnosing their imagined deficiencies. In a related vein, decide how you will safeguard confidential information that someone divulges. What are your agreed ground rules for reaching a hiring decision while adequately safeguarding personal and potentially sensitive revelations?

- **Fully integrate and explain your findings**

Novice executive assessors sometimes seize on certain findings because they are dramatic, novel, or simply familiar and easy to study and describe. That's a mistake. A thorough assessment pulls together all of the information threads to form a cohesive and comprehensive view of the candidate. Have you adequately summarized each important facet of this person's background, skills and characteristics? Is the picture painted by each of these qualities consistent? If not, how do you reconcile the conflicting details? And, most importantly, what are your ultimate conclusions about the person: is he, or she, a good fit? Or, suitable with a few job-related shortcomings? Or, is this person clearly a non-starter? Be specific.

Devote adequate thought to framing your findings in the context of the business and the role. Assure that your language speaks to the client, not just to your professional peers. How can you describe, for instance, a personality quirk in terms a business person can understand? What's the best way to raise issues when you can't fully address them? And, critically, under what conditions is the candidate most likely to succeed, or to fail? Why?

- **Make the most of feedback opportunities**

An ineffective executive assessment concludes meekly with a written assessment report. A strong assessment capitalizes on the opportunity to compare notes with the hiring executive and to pool what you both learn.

Set the expectation for dialogue with your executive sponsor. It doesn't need to be a blow-by-blow

recitation of all of your findings. Instead, concentrate on your core conclusions and recommendations – and be prepared to support them with key bits of non-confidential information.

Executives are decision makers. They expect your input to help them, but in the limited window of time that they can make available. Be clear and concise, yet thoughtful.

Finally, offer candidates the opportunity for feedback, if the client will allow it. A personal debriefing can be a rich and unusual source of insight for an executive. To demonstrate your ability to work in their fast-paced world where time is precious, concentrate on confirming some of their major skills, and also assemble a few important developmental suggestions.