



# CASE STUDY

USING ASSESSMENTS  
TO BUILD A WORKFORCE  
EQUIPPED FOR THE  
COMPANY'S FUTURE



Business Services

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# ProfileXT<sup>®</sup>

## Using Assessments To Build a Workforce Equipped for the Company's Future



### AT A GLANCE

This company uses a federated learning model for its global network of trainers and employee development activities.

### Company overview

A leading global provider of innovative workplace solutions recently turned to assessments to change its hiring processes. The business services firm enables companies of all sizes to work wherever, whenever and however they deem necessary. The company's worldwide presence includes more than 1,000 business centers in 450 cities in 85 countries.

The company's product offerings include fully furnished, equipped and staffed offices – as well as world-class business support, conference and meeting rooms, and a large network of video-conference rooms. In addition, the organization supports mobile and home-based workers with such services as virtual offices, which provide dedicated business addresses, and mail and call-handling services. In airports and other commercial hubs, the organization's business centers exist to serve clients wherever they find themselves.

In 1989, the company's founder and CEO launched the firm after noticing how many businesspeople were struggling with makeshift work environments while traveling. Today, organizations of all sizes, including more than one-half of the FORTUNE 500, turn to this organization to reduce costs – and to remove the burden of property ownership and office management, while gaining cost-efficient access to customized operations and amenities.

The company is publicly traded on the London Stock Exchange and follows an aggressive growth strategy. Recent milestones include the 2004 acquisition of a leading business center operator in the United States. For the year ending December 31, 2009, the company's revenues exceeded £1 billion.

The learning and development (L&D) function at the organization includes a global network of trainers and employee-development efforts that run the gamut of topics from sales and operations to customer service and leadership development.

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## KEY TAKEAWAY

The PXT offers a framework for discussing how the set of desirable traits for a particular job might evolve over time.

Pre-hire assessments can also be valuable in terms of succession management and the continued development of employees at all levels.

## The company's assessment goals

The business services firm sought a relationship with Profiles International in 2008 to improve its hiring criteria and processes, and began using the ProfileXT®<sup>1</sup> tool in 2009. Specifically, ideal profiles were developed for the positions of area sales manager and center manager.

Some organizations view the PXT as a tool primarily for reducing employee turnover by ensuring a better initial job match. It is worth noting that, while turnover improvements were certainly welcome, the company's aim focused more on the future and ensuring employees' long-term value.

The company has experienced a growth spurt in recent years, and company leaders expect similar change in the years ahead. During times of growth, companies often place greater importance on consistency in their decision-making criteria and processes because standards must be communicated to more people in more dispersed locations. Leaders at the organization believe an assessment-guided approach to hiring is helping to ensure that consistency. Without it, hiring decisions might be based too much on incidental variables, such as the rapport between a particular candidate and interviewer.

Also, the PXT offers a framework for discussing how the set of desirable traits for a particular job might evolve over time. That could conceivably lead to different hiring choices than if a job description were expected to remain static.

Finally, assessments can be considered not only in terms of the job being sought today, but also in view of subsequent roles that an applicant might be suited for down the line. In that way, pre-hire assessments can also be valuable in terms of succession management and the continued development of employees at all levels.



<sup>1</sup> For more information, *Profiles International: A Multifaceted Approach for Assessing Talent*, Bersin & Associates / Kim Lamoureux, January 13, 2010. Available to research members at [www.bersin.com/library](http://www.bersin.com/library).

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## BEST PRACTICE

This company implemented a two-month change management effort to reduce the natural fears that arise from assessments.

What we committed to, for our employees when they completed the assessments, was that we would use it as a development opportunity – a way that they could learn more about themselves, areas that they could get better at, as well as things they did very well that they may not have been aware of ... There was no hidden agenda. We were open. We were honest. We shared what we were doing.

## Change management

Development of ideal profiles at the organization required assessments of current employees in the positions of interest, with special attention to those viewed as top performers and those seen as being among the poorest performers. Leaders of the effort did not intend to force participation, but they knew poor participation could compromise results.

It is wise for organizations doing employee assessments to pause first and consider natural, fear-driven questions that might drive resistance. *Will the results be used against us? Will we be cast unfairly as liabilities to this company, losing opportunities for promotion or even being fired?*

The company opted not to let such concerns become an issue. For nearly two months, company leaders explained honestly to the targeted members of the workforce that assessments would be used to guide hiring, but that they would not be used in any way to weed out current employees from the organization. The success of this communication effort might be gauged by the fact that 110 people (about 90 percent of the targeted employees) did complete assessments. That provided plenty of information to create the two benchmark profiles – for the positions of area sales manager and center manager.

The company's global director of learning and development remarked, "What we committed to, for our employees when they completed the assessments, was that we would use it as a development opportunity – a way that they could learn more about themselves, areas that they could get better at, as well as things they did very well that they may not have been aware of ... There was no hidden agenda. We were open. We were honest. We shared what we were doing."

Assessment results have continued to guide employee-development efforts since the organization began using the PXT as part of its pre-hire screening process. Results may or may not be shared with individual subjects once hired, but managers routinely mine them for insights on how best to onboard a particular employee and then how best to manage performance. Also, the training team reviews the profiles before new team members attend onboarding training and use the information to work with individuals throughout the training.

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If we look at the profile that was created for the area sales manager role in Figure 1, we see 20 characteristics based on thinking style, behavioral traits and occupational interests. For each characteristic, individuals are scored against a range of ideal values to determine job fit.<sup>2</sup> Employees might fall under, within or above this range.

Figure 1: Job Match Pattern Ranges for Area Sales Managers

	Low Value	High Value
<b>Thinking Style</b>		
Learning Index	5	8
Verbal Skill	6	8
Verbal Reasoning	4	8
Numerical Ability	4	6
Numeric Reasoning	5	9
<b>Occupational Interests</b>		
Enterprising	8	10
Financial / Admin	6	8
People Service	7	9
Technical	5	7
Mechanical	1	3
Creative	4	6
<b>Behavioral Traits</b>		
Energy Level	7	9
Assertiveness	7	9
Sociability	6	9
Manageability	5	8
Attitude	3	5
Decisiveness	5	7
Accommodating	4	7
Independence	4	7
Objective Judgment	7	9

Source: Profiles International, 2010

<sup>2</sup> "Job fit" refers to the assessment of current knowledge, skills, competencies and other key qualifications of an individual against the requirements of a specific role (current or future).

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Figure 2 shows the percentages of the company's top and bottom performers who fall within the ranges that the new area-sales-manager profile recommends as ideal. You can see that a much lower percentage of bottom performers scored "within pattern." When employees score "below pattern," it simply means that they are not as good a "fit" for this role as those who score "within pattern." However, the selection of individuals is not based solely on this assessment. Some individuals may be selected even if they fall out of range on a handful of characteristics or traits.

The tool's primary benefit lies in the way it systematically draws managers' attention to areas where immediate employee development might be needed. Profiles International recommends weighting the assessment at 33 percent of the overall hiring criterion.

**Figure 2: Top and Bottom Performers against the Area Sales Manager Profile**

Thinking Style and Behavioral Traits Scales	Top Performers			Bottom Performers		
	Below Pattern	Within Pattern	Above Pattern	Below Pattern	Within Pattern	Above Pattern
Learning Index	0%	100%	0%	13%	75%	13%
Verbal Skill	13%	88%	0%	0%	75%	25%
Verbal Reasoning	0%	100%	0%	13%	88%	0%
Numerical Ability	0%	63%	38%	13%	50%	38%
Numeric Reasoning	13%	88%	0%	38%	50%	13%
Energy Level	25%	75%	0%	25%	63%	13%
Assertiveness	25%	75%	0%	63%	38%	0%
Sociability	0%	100%	0%	0%	63%	38%
Manageability	0%	100%	0%	13%	88%	0%
Attitude	0%	75%	25%	25%	0%	75%
Decisiveness	13%	75%	13%	38%	13%	50%
Accommodating	0%	100%	0%	50%	25%	25%
Independence	0%	75%	25%	0%	75%	25%
Objective Judgment	25%	75%	0%	88%	13%	0%

Source: Profiles International, 2010



### KEY TAKEAWAY

Revisions are made to job profiles periodically to strengthen the tool's accuracy in forecasting success on the job.

## Validating the profiles

Leaders recognized that the use of assessment tools and the makeup of ideal profiles must evolve to be effective. For that reason, assessment results are revisited periodically. These second looks help to strengthen the tool's accuracy in forecasting individual candidates' success on the job.

For example, leaders might recheck the assessment of a hire who went on to become a top performer. If assessment results are found to have aligned closely with the ideal profile, the profile's validity as a predictor of good performance grows. If, however, that top performer's assessment results deviated significantly from the ideal, there might be reason in hindsight to recalibrate the importance of certain traits.

Under the same premise, rechecking the assessment results of employees who leave the company can reveal that certain traits merit more attention as red flags. This has turned out to be the case with low assertiveness scores for sales candidates. The trait is now seen as more important than many others that are measured.

## Results

The financial impact of the company's new hiring processes is difficult to gauge because current challenges in the overall economy complicate numerical comparisons with the past. From a qualitative perspective, however, leaders at the organization feel their use of assessments has helped to keep hiring decisions grounded, compared with the impulse-based decision-making that hard times can sometimes breed.

For example, one regional vice president noted that during a past recession, leaders had convinced themselves that the company needed sales associates with higher salary requirements. Such additions to the sales force increased costs, but ultimately did not necessarily improve results. Through the more recent downturn, the business services firm has based hiring decisions more on candidates' compatibility with the company's selling style. Leaders feel the shift in emphasis has helped to reduce the time it takes for new sales team members to begin delivering consistent results. The faster ramp-up time for a sales team member is critically important to the organization and the team member.

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## KEY TAKEAWAY

Leaders at this company have found the PXT to be a great tool for helping to ensure that hiring decisions propel the organization toward its goal in a focused way.

## Next steps

The company plans to continuously improve all aspects of its assessment-guided hiring processes. Currently, for example, the company is adding a requirement that any manager who wants to make an external hire first receive mentoring from Profiles International on how to make the most of the PXT assessment tool.

Also, the organization is looking at ways to further pin down the meaning of specific scores on specific traits. While a theoretical percentage match with the overall profile offers valuable insights, leaders want to go deeper and understand, for instance, what different scores on a given characteristic might suggest about two applicants' future performance, comparatively.

Finally, the company wants to increase its use of assessments to guide employee onboarding and development, and for hiring from within the company. Plans include the creation of ideal profiles for more positions.

## Lessons learned

Leaders at the business services company have found the PXT to be a great tool for helping to ensure that hiring decisions propel the organization toward its goals in a focused way. For other organizations that might want to use assessments similarly, the company offers the following pieces of advice and points to keep in mind.

- **Expect a Dynamic Process** – Ideal profiles are a moving target. Job descriptions evolve, and so must the tools used to identify the best job candidates.
- **No Assessment Tool Can Do It All** – The tool is an asset, but it is the way in which you apply and integrate the tool with other tools and talent processes (e.g., performance management or succession planning) that will determine whether your organization achieves its goals.
- **Be Open to What the Assessments Tell You** – Sometimes organizations look for information to reinforce that they already do the right things or that a change they have already decided upon is the correct choice. That mindset is not ideal for mining the full value of a good assessment tool.

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