

“Assessment Strategy”

by Markku Kauppinen

“We want to start using your assessment tools as soon as possible”, the HR manager of an organization with about 40,000 employees told me.

“Great! I appreciate the opportunity to have your business and look forward to working with you”, I replied. “But, I do not quite yet understand why you want to use our tools. Could you please help me understand?”

“Oh, there are many reasons. I really like the way your reports present the information. It is very user-friendly. It is also great that you can customize the reports for different applications. And the team applications are something that I probably like the most”, he answered.

“I am glad to hear that. But how are they going to help you to improve your business?” I asked, getting a little uncomfortable inside. Maybe we will not do business after all.

I have had many similar conversations like this one over the years. If your organization uses assessments, maybe this one even sounds familiar to you. Today assessments are being used in almost all organizations and there certainly is no shortage of different assessment tools. They seem to be everywhere. They are even offered nightly on TV to entice people to sign up for online dating services. Apparently, assessments are THE answer to finding your soul mate. It seems everyone uses them. There must be compelling reasons.

There certainly are. But from a purely business standpoint, why should an organization invest in assessment tools?

What we see almost every time is that the organizations that use assessment tools do not tie them clearly enough into their business goals. They are almost used in a vacuum and, although everyone seems to agree that they “are valuable and useful”, the users often have trouble clearly articulating the impact they have on their organization.

But shouldn't the main reason for using assessments, or any other business tool for that matter, be that it improves the business? If they do not help in achieving the business goals, assessments are not doing what they should do.

Of course, there are many very valuable one-off applications of assessments. For example, they can be a very effective addition to a training program or help in making better hiring decisions. However, a more strategic approach to using assessments will have a more significant impact on the top and bottom lines.

Recently, I read an article that mentioned that "a recent study revealed that 63 percent of companies did not believe their workforce is adequately prepared to meet their future plans." It also stated that "human capital issues took four of the top 10 most pressing issues on senior leadership's plate." It certainly seems that workforce challenges are creating significant problems for many organizations.

However, the situation in your organization may be very different. These may not be problems for you today. But I knew that the HR manager sitting front of me was worried about whether they were doing enough to improve their workforce's effectiveness.

"What should we do to make sure assessments make a greater impact here?" he asked. "I am not sure that we have even given it all that much consideration. As long as I have been here, we have been using assessments...well, because our employees seem to enjoy them. In training evaluations, they always get positive comments."

He is not alone. But how can he ensure that he gets the most of the assessments?

In working with our clients, we find that the best results are achieved when an organization develops an assessment strategy that from the outset clearly addresses why it is utilizing assessment tools. Rather than using them only as a one-off application that addresses just one specific issue, they develop a holistic approach

to ensuring they really receive and use the information to improve their business.

"What should we do differently?"

Typically, our clients that receive the greatest business impact from the assessments take these steps:

- Identify the business purpose(s) for using assessment tools. In other words, be clear what the business goals are. Be specific.
- Identify what type of information is needed.
- Determine who needs the information. Is it HR, individual employees, managers, executives?
- Define what kind of information these different target groups need.
- Select or create the right kind of tool(s) to provide the information needed.
- Use the information in the context of the business application so that it ties directly back to the business goals.
- Finally, always keep the end result in mind. Typically, it is about how to make more money or how to reduce costs, or both.

If you take these steps as well, you will ensure that you are using your assessment tools strategically and in a way that drives your business forward.

"This makes a lot of sense. We want to start using your assessment tools as soon as possible", he said.

"More strategically", he added.

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When C-level executives are asked the question, “What one change in behavior will make you a more effective leader?” “I need to delegate more!” is one of the most common answers.

My caution to these executives is always the same, don’t delegate *more* – delegate *more effectively!*

Delegation is not a quality like “demonstrating integrity” or “complying with the law”. Honest, ethical and legal behavior is *always* appropriate – delegation isn’t. Inappropriate delegation can do more harm than good.

I saw an extreme example of the ‘empowerment is good’ flaw in one of America’s largest companies. The CEO naively believed that his people would always ‘rise to the occasion’ and saw the value of their ‘learning from their mistakes’. You can imagine what happened. He eventually promoted people to levels that were far beyond their capabilities. They were not ready for the challenge. Perhaps they could ‘learn from their mistakes’ when the mistakes cost thousands of dollars – but the company went bankrupt when the mistakes cost billions of dollars!

When feedback from direct reports indicates that a manager needs to delegate more effectively, the dissatisfaction could come from one of two causes: 1) the direct reports may feel that their leader is ‘micro-managing’ or getting overly involved with subordinates or 2) the direct reports may not feel ‘micro-managed’ at all, but may see their leader engaged in tasks that could be done effectively by someone at a lower level in the company.

To help leaders ensure effective delegation, my advice is simple:

First – have each direct report list her or his key areas of responsibility. Schedule one-on-one sessions with each person. Review each area of responsibility and ask the question, “Are there cases where you believe that I get too involved and can ‘let go’ more?” Then ask, “Are there

“Don’t Delegate More - Delegate More Effectively”

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cases when I need to get more involved – and give you some more help?” When leaders go through this exercise, they almost always find that in some cases more delegation is wanted – and in others more delegation is not wanted – in fact, more help is needed.

Second – ask each direct report, “Do you ever see me working on tasks that someone at my level doesn’t need to do?” “Are there areas where I can help other people grow and develop – and give myself more time to focus on strategy and long-term planning?” Almost invariably, direct reports will come up with great suggestions.

For example, for several of my C-level clients, team management has emerged as an area where ‘letting go’ can both free up executive time and help develop direct reports. Too many top executives feel a need to schedule team meetings and then act as ‘traffic cop’ during the meeting to ensure that the time schedules are met and that agendas are completed. This meeting management task can usually be delegated, on a rotating basis, to direct reports. This both helps the direct reports understand the agendas of the peer team members and helps develop their skills in building collaboration and reaching consensus.

In one case, my CEO client was frequently traveling. He would not schedule any team meeting when he was on the road – and was falling behind on some important projects. One team member suggested the he did not have to be present at every meeting and that the team could still get a lot done without him in the room. He was pleasantly surprised at the outcome! Decisions that involved cross-divisional cooperation were being made very effectively without having to involve him. Another advantage was that his direct reports were getting real ‘on the job’ training that could help them take on larger responsibilities in the future.

On the other side of the coin, one of my division president clients learned that his people consistently wanted *more* direction on one key

topic. The company was operating in a rapidly changing environment His direct reports didn’t need to be told ‘what to do’ or ‘how to do it’ on technical details – they needed to know how their work was fitting into the larger strategy of the corporation and how their efforts were aligned with both their peers in the division and their peers across the company. By establishing regular bi-monthly check-in meetings with each person, the president was able to both increase the effectiveness of the team and help them build better relationships across the company.

What are your next steps?

When are *you* getting too involved?

When do *you* need to get more involved?

Ask yourself these tough questions – then ask the people who are working with you.

The answers may both save your time and increase your team’s effectiveness!

Dr. Marshall Goldsmith recently been named by the American Management Association as one of 50 great thinkers and business leaders who have impacted the field of management. His 18 books include the Business Week best-seller, *The Leader of the Future* and *Global Leadership: The Next Generation*. Marshall is a world authority in helping successful leaders achieve positive change in behavior: for themselves, their people and their teams.

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