

# Harrison Assessments Validation Report for X Medical Company

## Position: Senior Counselor

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### Background

The aim of the research was to develop a new, customized template for the Senior Counselor (SC) position using data that had been collected over the past several years administering the Harrison Assessments questionnaire to applicants who were subsequently hired by the Company. In the past, the generic template, "Sales – Warm Leads" was used as a baseline for hiring for this position.

Creating a customized job template requires the collection of job performance data for individuals who have both taken the test, and are currently employed by the company. To accomplish this, Company HR and management provided performance ratings for 64 current SC employees, however only 25 of those individuals had completed the Harrison Assessments questionnaire and could be used for this research study. This sample size was sufficient for this analysis, however. The data was used to identify the difference between successful SC employees and less successful SC employees at the personal trait level. All 200 traits in the Harrison Assessments system were reviewed and statistically analyzed in relationship to performance, including those that were already included in the generic template for Sales – Warm Leads.

The Company provided overall performance ratings for SC's based on the following scale:

90-100	Excellent to Best Performance
80-89	Very Good Performance
75-79	Average to Good Performance
70-74	Somewhat below Average Performance
60-69	Below Average Performance
40-59	Poor Performance
39 and less	Extremely Poor Performance

The breakdown of the employees in the 25 person sample was as follows:

	<u># of employees</u>
Excellent to Best	10
Very Good	2
Average to Good	8
Somewhat below Average	4
Below average	1
Poor	0

## The Harrison Assessments template methodology

The template methodology formulates the traits that correlate with success for a particular position into *essential traits*, *important (or desirable) traits* and *traits to avoid*. The template is then used to measure future applicants and can also serve as a developmental guide for current employees.

Applicants or employees can be measured against the template and the results can be viewed on Group Screening Report (two such reports are attached; one for the original, generic Sales – Warm Leads template and one for the new SC template) that compare the applicants or employees to the position requirements for suitability as designated in the template. These reports provide an “overall” job suitability score between zero and one hundred that represents the individual’s level of *total suitability* for a particular position. A score of one hundred represents a person who is completely suitable for that position, though a score of 100 is extremely rare and is not realistic to expect for any position. Assuming the person is eligible for a position (has the education, experience, and technical skills), a suitability score of 75 or greater represents a person who has a good probability of performing effectively in that position. A score of 74 or less represents a person who is considered to be less likely to perform well in that position unless he/she has strong eligibility. As the suitability score goes below 60, the candidate is considered to be less likely to succeed in the position regardless of the eligibility level.

The overall suitability score is obtained from a *job points system*, which is a table within the system software that allocates points depending upon the score of each related trait. For example, if a person scores a 10 on a particular trait, that person would receive more points than if the person scores a 9. Since different amounts of a trait have a different impact on performance, points are allocated to different scores (amounts) for each trait.

The top row of the Harrison Group Screening Report shows the traits related to the position. These are listed in order of importance and the maximum number of points possible to achieve per trait is shown just below the trait name, in bold. For example, applicants who score a 10 on Takes Initiative on the generic Sales – Warm Leads template could receive a maximum of 125 points; whereas if they score a 9, they will receive fewer (112) points.

In some cases there are negative points. These indicate that the trait has a negative impact on performance at that level. Important, or Desirable traits only have negative scores. This indicates that an absence of the trait correlates with poor performance, but there is no other correlation with different amounts of that trait. The Traits to Avoid start with high negative scores and as the negative trait decreases in intensity, so does the negative impact. All the positive scores are added and then all the negative scores are subtracted; the final percentage is then calculated by the number of points obtained divided by the number of points

possible. This is the *overall suitability score* shown in the table on the right end of the chart in the green area, next to Consistency Score.

The *consistency score* refers to the consistency of the test taker's response pattern within the questionnaire. In this sample, consistency scores ranged from the highest possible level (100, which represents 100% consistency) to rather low (29), but all were in the range that is valid and acceptable for this position. Consistency scores range from a low of -450 to a high of 100, and any positive score (0 – 100) is considered 90% valid and reliable. For managerial candidates, a consistency score of at least 50 is considered acceptable, rather than 0, however even in this sample there were only 4 individuals who scored below 50, which is a strong result for analysis.

In the Harrison Group Screening Report for the original, generic Sales – Warm Leads template, Takes Initiative and Wants Challenge are the most Essential traits, and receive the highest number of points (125 total points each). As a person's score on that trait decreases, so does the number of points obtained. The other essential traits in this template have lesser weights with 100 total possible points for the traits Enthusiastic and Self-improvement, Influencing (90), Optimistic (80), Outgoing and Self-acceptance (70 points each).

In the Group Screening Report for the new SC template, there are five top tier traits: Collaborative, Diplomatic, Enlists Cooperation, Helpful, and Warmth/Empathy. Each has a total point value of 80. The other 11 traits in the essential category are weighted equally at a total of 65 points, which makes their impact on the overall score slightly less.

The methodology used above allows the traits to be weighted in terms of impact compared to the other traits. In addition, it allows for different amounts of each trait to have a different impact on the overall suitability. It also allows for some traits to only have a negative impact on performance. This is particularly important for traits where poorer performers tend to have the trait (or be lacking in the trait) but there is no overall correlation with performance.

## **Results of the performance analysis**

Analysis of the performance of the individuals in the sample revealed some very interesting findings. Some of the traits in the original template were correlated with success, while others did not correlate positively with successful job performance. In fact, the correlation between test score on the Sales – Warm Leads template and job performance ratings for the individuals in the sample was non-significant (-.16). This means that the template was not successfully identifying those who would later turn out to be the best performers in the job. It is likely that the template did ensure some level of minimum performance since it screened for self-motivation and other interpersonal skills factors that are important to professional-level positions in organizations such as this. However,

it is clear from this research that a more customized template is needed to fine-tune the qualities that lead to success in this particular job.

### Discussion of the Generic Template: Sales – Warm Leads

The Sales – Warm Leads template has historically been used to screen for the SC job. This template is one of about 40 generic templates that are built-in to the Harrison Assessments system. This template is described as:

*“... relating to sales in general but is oriented toward sales positions which require prospecting for new clients that are pre-qualified and interested in the service or product. It focuses on achievement, self-motivation, and various interpersonal skills related to persuasion.”*

This description, on its face, seems to fit the purpose, duties and responsibilities of the SC position. However, the data related to success on the job do not support the use of this template in many cases, as the detailed analysis in the next section will outline. In overview, the most essential traits for this template (see attachment, Harrison Assessments Group Screening Report: Sales, Warm Leads) include heavy self-motivation factors, while the most successful employees exhibit only moderate self-motivation and much stronger interpersonal skills traits. In fact, the most successful employees have a profile that is quite different from a traditional sales profile, as this report will show.

### Essential Template Traits

The most Essential traits in the original template were **Takes Initiative** (defined as, “the tendency to perceive what is necessary to be accomplished and to proceed on one’s own”), and **Wants Challenge** (defined as, “the willingness to attempt difficult tasks or goals”). Both of these traits, while important to success, did not distinguish between superior performers and merely adequate performers. Thus, Takes Initiative was moved from the Essential category to the top of the Important (or Desirable) category where it will guard against *absence* of the trait, or *low scores* in this trait, but not reward candidates with extremely high scores vs. those with sufficient scores. Wants Challenge was moved to the bottom of the Essential category with a lesser point value where it will reward those with a moderately high scores for this trait, which is more appropriate to the level of this trait displayed by the superior performers.

The other traits in the essential category included:

**Enthusiastic** – is defined as the tendency to be eager and excited about one’s own goals This trait did differentiate superior performance slightly, thus it remained in the essential category, but the point value was reduced.

**Self-improvement** – is defined as the tendency to want to develop or improve one’s self. This trait, while important to success on the job, did not differentiate superior from adequate performers. That is, a moderate score was sufficient to success on the job. Thus, it was moved from the essential to the important traits

in the template. That is to say that employees with a moderate amount of desire to improve themselves tended to be the best employees, rather than those employees with an avid, or outstanding desire to improve themselves.

**Influencing** – is defined as the tendency to try to persuade others. This trait actually had a negative correlation with success on the job. That is, the best performers had a average score of 7.7 on this trait, while the merely acceptable performers had an average score of 8.5 on this trait. What this tells us is that a moderate score on Influencing (7 – 8) is the best predictor of success in this job, NOT a high score (9 – 10) on Influencing. Thus, Influencing was moved down to the Important category so that it merely screens for low scores on this trait and deducts points if a candidate's score is lower than a 7.

**Optimistic** – is defined as the belief that the future will be positive. This trait correlated with success (i.e. the best performers had high scores on this trait) and is retained in the essential category on the new template.

**Outgoing** – is defined as the tendency to be socially extraverted and enjoyment of meeting new people. This trait did not differentiate successfully (best performers had an 8; worst performers had a 9) and so it was moved to the important category where it will screen only for low scores in this trait.

**Self-acceptance** – is defined as the tendency to like one's self the way one is. This trait also did not differentiate (best performers = 6.6; worst performers 7.2). It was taken out of the Essential category altogether.

A number of different traits emerged as strong Essential traits for this position, including:

- **Collaborative** – the tendency to collaborate with others when making decisions
- **Enlists Cooperation** – the tendency to enlist others to participate or join in an effort
- **Warmth/Empathy** – the tendency to express warmth and positive affinity to others (was in the Important category in the original template)
- **Flexible** – the tendency to adapt easily to change
- **Forthright Diplomacy** – the tendency to be forthright and respectful at the same time
- **Frank** – the tendency to be to the point and straightforward in communication
- **Persistent** – the tendency to be tenacious despite encountering significant obstacles
- **Precise** – the enjoyment of work that requires attention to detail and exactness
- **Prolific Quality** – the tendency to be productive while still paying sufficient attention to detail
- **Team** – the enjoyment of working closely in a cooperative effort with others

Some of these traits were included in the original template, but were in the Important category and were simply elevated to Essential status; others were simply added to the Essential traits. The addition of these differentiating traits to the Essential category ensures that we are selecting for those traits that separate the superior from the adequate performer.

### Important, or Desirable Template Traits

New traits emerged from the study as indicative of job success for the Important category, including:

- **Relaxed** – the tendency to feel at ease or calm while working
- **Systematic** – the enjoyment of tasks that require working through a specified series of steps
- **Health/Medicine** – an interest in the health and medical fields
- **Tolerance of Structure** – the acceptance of following rules, policies and procedures set by the Company
- **Systematic** – enjoyment of tasks that follow a set of steps, or rules

**Tolerance of Bluntness** remained in the Important category.

### Traits to Avoid (negative traits)

The Traits to Avoid category guards against candidates possessing counter-productive, or negative traits, or trait combinations relevant to the specific position. Possession of these traits triggers minus points; that is, if the candidate has a sufficient amount of any of these traits, then points are subtracted from their overall suitability score.

The original template included these traits in the Traits to Avoid category:

- **Self-critical** – the tendency to dislike one's self and at the same time desire to be different
- **Blunt** – the tendency to be excessively frank without using tact or diplomacy

Both of these traits were related to success and were retained in the new template.

The study indicated that other, specific traits to avoid should be included in the new template to give it more power to discriminate. These include:

- **Stressed Pessimism** -- the tendency to be stressed or distressed while believing that the future will be bleak
- **Dogmatic** – the tendency to be certain of one's own opinion while not being open to other ideas or opinions
- **Forceful Enforcing** – the tendency to get others to follow rules or regulations without trying to enlist their cooperation first
- **Rigidly Organized** – the tendency to focus so much on being orderly that one has difficulty being flexible
- **Evasive** – the tendency to be excessively diplomatic without using frankness, or speaking one's mind

- **Insensitive** – the tendency to be assertive about one’s own needs without expressing warmth for others
- **Defensive** – the tendency to focus on self-acceptance without investing in self-improvement
- **Self-sacrificing** – the tendency to respond to others’ needs without expressing one’s own needs
- **Permissive** – the tendency to express warmth for others without sufficiently enforcing needed rules, procedures or processes
- **Harsh** – the tendency to enforce rules without sufficient warmth for others
- **Pay Minus Motivation** – the tendency to want high pay but lack sufficient self-motivation to achieve it

### In Summary

Each of the essential traits above show a correlation with success. Low scores on each of the Desirable traits are related to lesser performance. High scores on the traits to avoid are each related to lesser performance. Therefore, every trait included in the template has a relationship to performance.

The newly revised template contains *more traits* than the original template (total of 38, compared to the original number of traits = 12). We are able to add more traits to the template by having the research data on current employees available to us; without the research it is advisable to restrict the number of traits measured so as not to put up barriers that may not in fact support success on the job. In this way, performance data yields hard data upon which we can build a more finely-tuned template, or instrument.

### **Conclusions**

The correlation coefficient that was calculated showing the relationship between suitability (test) score and job performance for the original template = -.16. This finding shows a lack of correlation between test performance and subsequent job performance.

The correlation coefficient that was calculated showing the relationship between suitability scores and the performance scores of the new SC template came out at .74. This score shows an extremely strong relationship between test performance and job performance. According to the attachment on psychometric tests, a .7 correlation coefficient indicates the highest level of prediction for selection instruments, typically only achieved by multi-part assessment centers which generally span several days of testing using multiple instruments and measures. This new template should be an outstanding instrument for use in predicting success in the SC role in the years to come.

Overall, this job template should be considered as strong evidence of face validity and concurrent validity for this position template. In addition, all of the factors resulting from the analysis logically relate to the performance criteria. This

provides confirmation of construct validity and confidence that the resulting template includes traits related to success. Consequently, this template can be used with a high level of confidence for selection and development for this position.

## **For the Future**

It is recommended that this analysis be repeated approximately every two years with new performance information to continue to validate the traits that lead to success on the job. Because jobs, organizations and even societal trends and values change over time, it is important to periodically “test the test” with fresh data.

Further, Company management may wish to use this data from the new template with existing employees for their continued training and development. To do this, simply run each individual against the new template and generate a Development Report for that person which will pick up the two traits that would benefit most from further individual development. There is no system unit charge to do this because the maximum number of units (which is 6) has already been run. For more information about how to put this development plan into action, call the consultant listed below.

Thank you for the opportunity to work with you on this project.

Respectfully submitted by:

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