



Behavioral Assessments in Post-Hire Initiatives:
Success Drivers and Best Practices



How Do Organizations Use Post-Hire Assessments?

Although behavioral assessments have been used for many years as a component of the recruiting and hiring process, HR executives are increasingly turning to these effective tools to develop talent, address weak leadership pipelines and ensure effective succession management.

A recent report from The Aberdeen Group, a leading provider of fact-based research on global technology solutions, shows that the current economic environment has changed the agendas of HR executives, and many now plan to focus on retaining, developing and engaging the current workforce. In the Aberdeen report “Assessments in Talent Management” which was conducted in the first quarter of 2009, Best-in-Class organizations (defined as those that have improved by more than 30 percent the overall employee performance, employee productivity and quality of hire) are more aggressive at using assessments in the post-hire stages of talent management, particularly in development and succession.

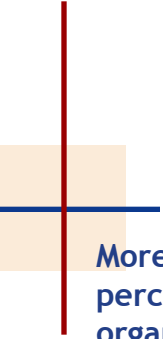
Also, Best-in-Class organizations in the report are more than twice as aggressive as other companies to integrate assessment software with other talent management applications, and 92 percent are planning growth in talent management technology integration. However, the report also showed that less than half of Best-in-Class organizations (41 percent) integrate assessments with talent management software applications. These results clearly show that even with Best-in-Class organizations, room for improvement exists. What the report doesn't show, but Birkman has observed, is that most organizations tend to use assessments as part of the pre-hire process. Few actually integrate these assessments with talent management tools that improve performance, facilitate learning and clarify succession planning. For these organizations, a sense of urgency should exist. As the Aberdeen Report showed, organizations that integrate are nearly three and a half times as likely to earn Best-in-Class status as those that don't.

To better understand how organizations are leveraging behavioral assessments in post-hire initiatives and how the use of talent management software may change the approach taken to use behavioral assessments, Birkman surveyed hundreds of professionals to find out how they conducted these initiatives.

Key findings indicate:

- Large organizations (> 1,000 employees) use behavioral assessments in post-hire initiatives in a larger proportion than smaller organizations (< 1,000 employees), 83 percent and 67 percent respectively.
- Smaller organizations have been more successful in getting results from the use of behavioral assessments in post-hire initiatives.
- More than 70 percent of organizations believe that post-hire behavioral assessments are somewhat relevant or extremely relevant on initiatives such as retention, engagement, promotion, workforce alignment, workforce planning and leadership development.
- A majority of respondents said they don't work with a talent management vendor (53 percent). In the case of small organizations, 60 percent of respondents said they don't have a talent management software vendor.
- Organizations that do have a talent management vendor have experienced greater success with behavioral assessments in post-hire initiatives.

To better understand why smaller organizations and those using talent management software have more success in using post-hire behavioral assessments, Birkman took a closer look at the results, including responses to open-ended questions from survey respondents.



More than 70 percent of organizations believe that post-hire behavioral assessments are somewhat relevant or extremely relevant on initiatives such as retention, engagement, promotion, workforce alignment, workforce planning and leadership development.

Why Do Organizations Succeed with Post-Hire Assessments?

Although use of behavioral assessments is general accepted as an effective way to identify candidates who best fit an organization, small organizations and organizations using talent management software are finding more success using these assessments to improve retention, develop leadership, promote and engage the best talent in an organization. What are these organizations doing right?

- **They understand the relevance.** In general, smaller organizations and those that use talent management software find the use of behavioral assessment in post-hire initiatives more relevant than other organizations.

How relevant do you think the use of behavioral assessments are in each of the following post-hire initiatives? (Responses for “extremely relevant”)

	Retention	Engagement	Promotion	Workforce Alignment	Workforce Planning	Leadership Development
Large orgs	29%	43%	21%	25%	29%	68%
Small orgs	42%	44%	41%	54%	39%	72%
Talent Mgmt users	36%	51%	43%	47%	35%	77%
Not users of Talent Mgmt	31%	46%	36%	36%	24%	74%

Overall, respondents from small organizations and those that use talent management software report significantly more success than other organizations in using behavioral assessment in post-hire initiatives.

Overall, the post-hire activities that respondents find most relevant for the use of behavioral assessments are employee engagement and leadership development. However, small organizations find assessments more relevant for workforce alignment and those using talent management software for retention, promotion and leadership development.

Said one respondent: “Our use of assessments succeeds because it takes away some of the ‘mystery’ surrounding fellow management team members. Rather than guessing, peers and managers can have a better understanding of the individual’s style and approach.”

- **They use assessments extensively.** Overall, respondents from small organizations and those that use talent management software report significantly more success than other organizations in using behavioral assessment in post-hire initiatives. They have seen relatively more success in initiatives related to retention and workforce planning, but the most successful initiatives have been leadership development and engagement. “Behavioral assessments are particularly effective when done across an intact work group,” said one respondent. “Individuals come to grips with each other’s unique qualities and can work together more effectively. This is tremendously helpful in breaking down barriers quickly, resulting in more effective teamwork.”

Please rate your organization's success using behavioral assessments in each of the following post-hire initiatives. (Responses for "extremely successful")

	Retention	Engagement	Promotion	Workforce Alignment	Workforce Planning	Leadership Development
Large orgs	5%	20%	8%	10%	8%	33%
Small orgs	20%	33%	25%	26%	16%	55%
Talent Mgmt users	14%	29%	20%	19%	13%	47%
Not users of Talent Mgmt	13%	20%	16%	20%	14%	45%

Respondents from small organizations and those using talent management software report using behavioral assessments more than other initiatives for workforce alignment.

- **Present and past successes drive future investments.** "Successful implementation of these assessments can bring clarity and focus to issues," said one respondent. "Assessment tools need to be fully integrated into the management process and continually referred back to as a management/business resource. They can provide an essential 'business dashboard' just as financial results or sales results." Respondents from small organizations and those using talent management software report using behavioral assessments more than other initiatives for workforce alignment. However, respondents indicate that engagement and leadership development will be the post-hire activities that will enjoy the largest growth in the use of behavioral assessments in their organizations.

Please select how your organization plans to change the use of behavioral assessments in each of the following post-hire initiatives. (Responses for "increase")

	Retention	Engagement	Promotion	Workforce Alignment	Workforce Planning	Leadership Development
Large orgs	27%	36%	28%	33%	29%	52%
Small orgs	33%	46%	31%	43%	38%	52%
Talent Mgmt users	36%	43%	34%	42%	36%	56%
Not users of Talent Mgmt	29%	43%	29%	38%	33%	52%

Adopt Best Practices to Increase Efficiency

Organizations that want to learn from how small organizations and Talent Management software users effectively use behavioral assessments should consider these best practices to refine their use of these tools.

- **Integrate behavioral assessment with Talent Management software.** Use of Talent management software is a particularly effective way to align individual behavior to organizational objectives. This technology can transform an annual review into an active ongoing coaching and development opportunity that improves employee performance. When behavioral assessment is integrated with Talent Management software, managers can bridge communication gaps with employees, future leaders can be identified and developed, and the value of teambuilding exercises can be retained and built upon.

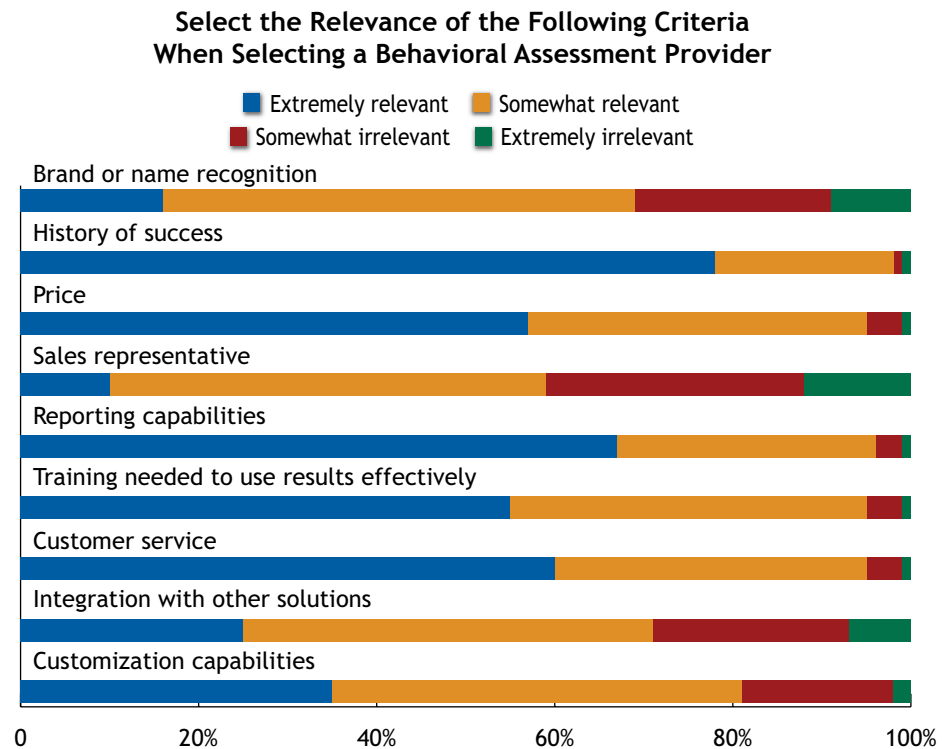
Not surprisingly, 71 percent of current Talent Management users said it was important for a behavioral assessment provider to have a system that integrates with Talent Management software, but only 51 percent of non-Talent Management users said this was important. Furthermore, 69 percent of respondents from large organizations – the typical target market for most Talent Management software vendors – said integration was an important factor, but only 49 percent of small firms said this was an important factor.

- **Find the right vendor.** Users of Talent Management software express a higher level of satisfaction with their behavioral assessment vendor. When asked, 58 percent said that they were extremely satisfied, much higher than the 44 percent of non-users of Talent Management software. Small firms were much more apt to say they were extremely satisfied with their behavioral assessment vendor than large firms, 58 percent to 35 percent. This is not surprising because Talent Management users and small firms are better able to take the results of these assessment and put them into action within their organizations.
- **Make results relevant to employees.** Implementing behavioral assessments is less of an obstacle for most organizations that show employees what it means for them. Respondents clearly understood this. When asked to name the most significant implementation challenge for behavioral assessments, understanding how to use the results and make them relevant to employees was listed as an extremely relevant concern for 85 percent of all respondents. Regardless of organization size or use of Talent Management software, this finding held up.
- **Apply results consistently over time.** Although many organizations will invest the money in behavioral assessments, this is a one-time exercise for some organizations because they make no effort to make the results relevant to the work of the organization. Use of Talent Management software can integrate these assessments seamlessly into performance management, succession planning, leadership development and learning initiatives. As a result, it isn't surprising that nearly half of Talent Management users (46 percent) said that their organizations track and measure results from behavioral assessment, almost twice as many as non-Talent Management users (24 percent). Respondents from small organizations were also more likely to track and measure results than large organizations, 37 percent to 23 percent.
- **Use consultants.** Outside expertise can provide much-needed support to launch and implement behavioral assessments and increase the likelihood of success. Respondents recognized the value of consultants almost across the board. Although Talent Management users and non-users were almost in complete agreement on this point (53 percent/56 percent, respectively), a much wider disparity existed between respondents in small and large organizations. Two-thirds (67 percent) of small organization respondents believed that consultants were necessary support for effectively launch and implement, but only 40 percent of their counterparts in large organizations agreed. Many of the larger organizations have trained facilitators within their companies that serve as "inside" consultants.

When behavioral assessment is integrated with Talent Management software, managers can bridge communication gaps with employees, future leaders can be identified and developed, and the value of teambuilding exercises can be retained and built upon.

- **Focus on a proven track record.** Regardless of size and whether or not their organization used Talent Management software, 78 percent of respondents cited a history of success as the most important selection criteria for selecting a behavioral assessment vendor, followed by reporting capabilities (67 percent), customer service (60 percent), price (57 percent) and training needed (55 percent). Brand name recognition ranked last out of all criteria, with only 16 percent saying it was an extremely relevant criteria.

In the survey, 78 percent of respondents cited a history of success as the most important selection criteria for selecting a behavioral assessment vendor.



How to Select the Right Behavioral Assessment for Your Organization

Although important lessons can be learned from the experiences of others, no one-size-fits-all approach exists for successful selection and implementation of behavioral assessments in your organization. However, here are some recommendations for choosing the right assessment and vendor:

- **Find an outside partner.** As one respondent put it, you can't be a prophet in your own village. Find a partner/consultant to challenge your assumptions and guide you in the evaluation, selection and implementation of behavioral assessments in post-hire initiatives.
- **Develop a strategy that fits your organization.** Assess your company culture and understand what the objectives are for your use of behavioral assessments in post-hire initiatives. Determine what results you want to achieve from this initiative and how you will measure and track results. Very few organizations allocate the appropriate amount of time to measure results. This exercise will facilitate efforts to lock down executive support and will help build trust in the initiative.
- **Identify selection criteria.** To find the behavioral assessment that meets the needs of your organization, make sure that your criteria are aligned with the objectives and results set for the initiative.
- **Define what success looks like.** Focus on creating a short implementation plan to drive signs of success early in the process. The ease of use and learning curve associated with the use of the behavioral assessment tool selected should be taken in consideration when creating the implementation plan as well.

Conclusion

Applied appropriately and with consistency, use of behavioral assessments in post-hire initiatives can improve employee productivity, development and engagement. Most organizations, regardless of how they implement assessments, are seeing success in their use.

When these assessments are used in conjunction with Talent Management software initiatives, the results can be significant. According to Bersin & Associates research, performance management based on coaching and development has stronger positive outcomes overall than performance management based primarily on competitive assessment. The connection between behavioral assessment and talent management initiatives is clear, but many organizations still won't see it.

If you are using behavioral assessments in post-hire initiatives, make sure you are getting a great service from your provider. Survey respondents cite a good provider relationship as one of the keys to boosting the acceptance, adoption and efficiency of the assessments. Find a vendor with a track record of success and the ability to support your assessment needs. If you don't have a current vendor or you aren't satisfied with your current provider, contact Birkman International.

When behavioral assessments are used in conjunction with Talent Management software initiatives, the results can be significant.



About Birkman

Birkman International (www.birkman.com) is the provider of the industry-leading personality assessment that facilitates team building, executive coaching, leadership development, career management and interpersonal conflict resolution. For over 50 years, corporate human resources professionals, independent consultants, executive coaches, educational institutions and other not-for-profit organizations have used The Birkman Method® with over 2.5 million individuals. The Birkman Method® accurately measures productive behaviors, stress behaviors, underlying needs, motivations and organizational orientation. Visit www.birkman.com to learn how The Birkman Method® can help you maximize human potential and achieve results that are both superior and sustainable.