corestrengths®

WHICH ASSESSMENT WILL REALLY MAKE A DIFFERENCE?

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FOR MILLIONS OF PROFESSIONALS THE WORLD OVER, taking a personality assessment now comes with the job. According to the Society for Human Resource Management (SHRM), about 60% of employees are asked to take an assessment of some sort, with 22% of employers using assessments to evaluate job candidates. It's no wonder that the assessment market has grown by about 10% annually over the past several years, reaching $500 million in annual sales.[1]

This growth stems from a long history of use. The early 1900s saw the introduction of Alfred Binet's intelligence test, for the original purpose of identifying children who needed additional assistance in Paris schools. During World War I, the U.S. Army commissioned the creation of a test for the purpose of de-selecting emotionally unstable soldiers who would likely suffer from shell-shock, but the war ended before the test was completed. The pressures of World War II caused the U.S. Veterans Administration to respond by creating a large hospital system that employed psychologists to help returning soldiers reacclimate to civilian life. A shortage of trained psychologists led to the development of group training programs, interview techniques, and statistical analysis in order to provide help to as many people as possible.[2]

Now, 100 years later, more than 2,500 tests are available, many of which are clones or iterations of original works. Some tests are diagnostic, while others are developmental. Some of these iterations have made improvements, others are simply poor imitations of the originals. On top of the sheer variety of assessments, the world of work has changed dramatically. So it's worth taking the time to evaluate what some of the most popular assessments measure, how their insights are applied, and what theory and evidence supports their use.

Insights from assessment results are interesting when they are about you. But that, unfortunately, is the limit of many assessment results, because their underlying theories are based on individuals, **not on relationships.**

Core Strengths® training is powered by the Strength Deployment Inventory (SDI) 2.0 personality assessment, which is grounded in Relationship Awareness® Theory.[3] We believe an assessment—with effective training and application—can produce profound effects on working relationships, company culture, business performance, and the development of talented people. We also believe that comparing our theory and assessment with others offers a good way to help organizations find the right fit for tackling the business initiative at hand.

This guide starts off with some important issues to keep in mind when considering the administration of any type of personality assessment, and how the SDI 2.0 addresses those issues. Next we provide a brief overview and critique of four commonly used assessments, along with some advantages that the SDI 2.0 brings to the table. Finally, we conclude with a look at the most recent developments currently underway at Core Strengths.

ASSESSMENTS IN THE REAL WORLD

Training too often gets forgotten when people re-enter the workplace. No matter how well a program is facilitated, or how much fun people have during a program, training loses its impact if learners are not sure how to apply what they've learned. Savvy training buyers look for programs with assessments that emphasize practical application. Here are a few guiding principles.

The assessment should be reasonably simple to complete.

In most organizations, time is everyone's most valuable resource, and people simply don't have enough of it to complete lengthy questionnaires. The solution should offer flexibility in how the assessment and its results are delivered. Compatibility with mobile devices is a big plus. As a general rule, the easier and more engaging the assessment experience is, the more people will actually complete it, which means less time is required by administrators to track down incompletes.

Results should be easy to remember, with high face validity.

Most personality assessments were designed by psychologists who devoted their lives to developing rich and complex psychometrics. Therefore, the results are often presented in long-form narratives peppered with special codes or language that must be deciphered then committed to memory. Jargon and complexity tends to reduce the value of people's results, because they have a hard time remembering what the various codes mean.

Results that are presented using simple language are more memorable, but even more important is whether the results are accurate. Results that feel right to the learner have face validity, and this is essential to participant engagement. Core Strengths SDI 2.0 excels in this measure with >99% face validity. We've achieved this because our solid theoretical and statistical foundation[4] gives us a compelling way to describe people's core personality and to link motives to the strengths they use at work.

When participants accept the results of their assessment, they are much more likely to remember them. They are also more likely to be curious about the results of others. When people resist or dismiss their assessment results, they disengage from the training that asks them to apply those results. Assessments with low face validity have little impact on individuals or your organization.

The assessment results should be applicable to people's relationships.

Insights from assessment results are interesting when they are about you. But that, unfortunately, is the limit of many assessment results, because their underlying theories are based on individuals, not on relationships. Assessment results are most useful when they help you improve your relationships. Furthermore, the results should be applicable across situations. With Core Strengths training and SDI 2.0, we see that the core "you" is present in every situation and interaction. But the strengths you use can change based on the people you are with, your goals, and the demands of the situation. A good assessment will not limit you to a specific situation or overgeneralize to the point of being impractical.

Training should be focused on workplace application.

Relationship Intelligence is the applied awareness of people's motives and strengths to communicate in the right style and achieve goals faster.[5] Most assessment-based training is delivered for teams or groups, based on the assumption that the awareness gained by each person will foster better communication and higher performance. But this is possible only if the training focuses on how to communicate about the results and how to apply them at work. Your people should have easy access to their results and be able to share them just as easily with colleagues.

Not many assessment products provide a simple way for people to share their results, which makes Core Strengths' SDI 2.0 unique. First, learners immediately use their results as an integral part of the training. Facilitators use a custom-built presentation platform to dynamically display individual and team results, which helps to establish a common language and shared frame of reference that people continue to use after the training.

When the members and leaders of an organization embrace the concept of adapting their communication style in light of what they've learned, your training investment will have a far greater return.

Participants leave with a deep understanding of themselves and others—when things are going well and when there is conflict—and an action plan focused on an important workplace situation. This insight and action plan is kept top-of-mind through our Relationship Intelligence platform, which offers the ability to share assessment results with other people in the organization (with customizable privacy settings). This keeps the learning alive and brings relationship dynamics to bear in key situations, such as during meetings or when preparing for an important conversation. It's like having a communication decoder, or an expert advisor on call to guide your approach to a situation where you need to be heard or you know you face resistance.

Make sure the training is suitable to your performance challenge.

If you're designing instructional programs, conduct a needs analysis where you first identify the performance gap you're trying to bridge. Without knowing what

problem you're trying to solve or performance lever you need to pull, it's almost impossible to choose the right assessment solution.

Organizations typically have multiple initiatives underway such as: increasing retention of top performers, helping managers become better leaders and coaches, encouraging inclusion and diversity, sparking innovation, reducing the cost of conflict, or one of the many forms of culture change. The best assessment solutions meet people where they are and help them connect authentically to the work that needs to be done.

COMPARING SDI 2.0 TO OTHER ASSESSMENTS

The following brief comparison of the theories behind four popular assessments highlights some of the key points of difference. It's by no means exhaustive, but it is a good starting point as you seek to understand what each of these tools were intended to do, and where SDI 2.0 can bring advantages to the table.

DISC AND MARSTON'S THEORY

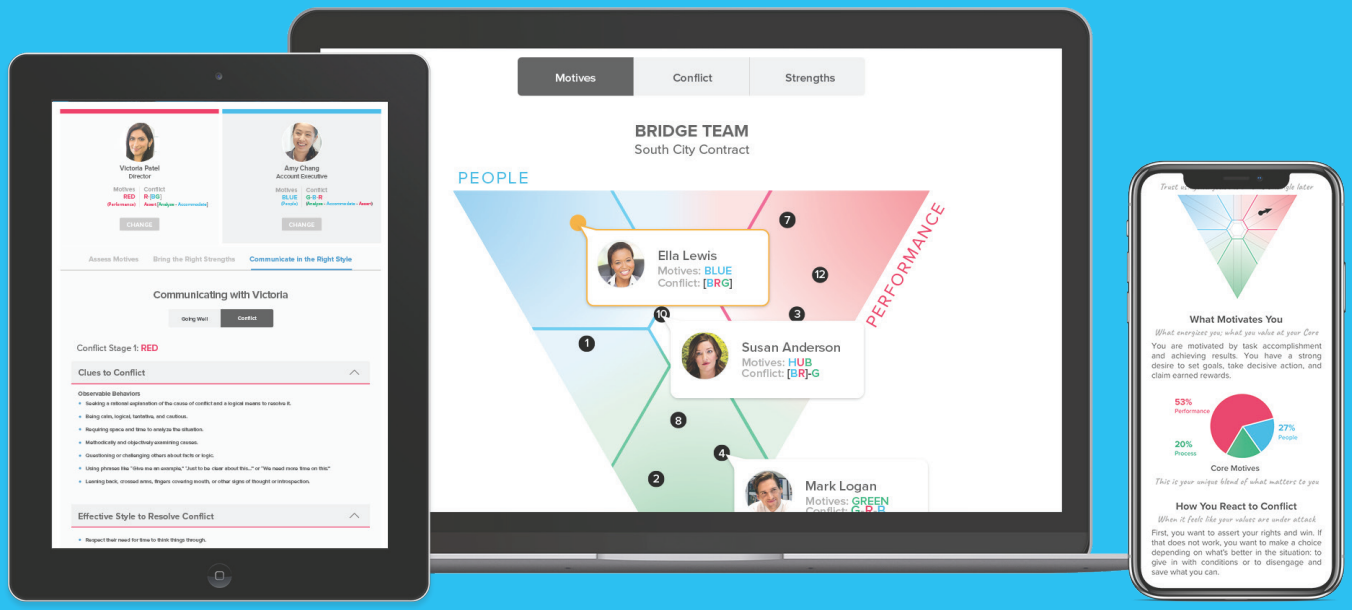
While there are many versions of DISC assessments available, with the letters sometimes indicating different words in various versions, most acknowledge William Marston as a key contributor or originator of the concept. Marston was interested in truthfulness and the effects of the environment on people's behavior. He invented the systolic blood pressure test, which is a key part of the polygraph (lie-detector). Marston also created the comic-book character Wonder Woman and her lasso of truth, which compelled people to tell the truth.

Marston believed that people's actions changed based on their perception of the environment. The interaction between environment and response are the basis for the primary DISC types, which are Dominance, Influence, Steadiness, and Compliance. For example, Dominance describes an assertive response to an antagonistic environment (such as Wonder Woman fighting the bad guys), and Compliance describes a passive, or submissive, response to an antagonistic environment (such as when the bad guys were captured by Wonder Woman's lasso). The underlying premise is that behavior changes stem from environmental factors. A stressful question causes a noticeable change on a lie-detector, and a lasso causes a previously violent criminal to passively submit to authority.

Critics argue that DISC isn't a personality assessment because personality, by definition, is the set of enduring, stable characteristics of a person that are not due primarily to the environment.[6] The risk associated with using DISC is that people will assume that the results are stable over time, but the underlying theory suggests that the results should change as the situation changes.

The Core Strengths SDI 2.0 Advantage

At Core Strengths, we agree that people act differently in different situations, but we also believe that there is quite a lot more to the story. The SDI 2.0 measures core personality under two conditions—when things are going well and when there is conflict. There are stable patterns of human motives that are not the result of the environment. SDI 2.0 also takes the environment into account by reporting the strengths people use productively at work, along with the way strengths appear when overdone at work, which can limit individual and team effectiveness.



Core Strengths Relationship Intelligence

SDI2.0 SHOWS THAT YOU

DO NOT HAVE TO CHANGE WHO YOU ARE

IN ORDER TO CHANGE WHAT YOU DO.

MYERS-BRIGGS TYPE INDICATOR (MBTI)

Based on Swiss psychoanalyst Carl Jung's theory of psychological types, the MBTI has been applied in many organizations since the 1960s. Katherine Briggs began research into personality after hosting her daughter, Isabel, and her fiancé, Clarence "Chief" Myers, for Christmas dinner. Katherine, a writer, had found Chief difficult to read. She wanted to understand him better, so she undertook psychological research that led her to the writings of Carl Jung.[7]

Years later, Isabel created the Myers-Briggs Type Indicator, adding Briggs to give her mother, Katherine, credit for undertaking the initial research. That test, as well as several other assessments based on Jung's theory, provides a four-letter type code from four pairs of opposite preferences: Introversion vs. Extraversion, Sensing vs. Intuition, Thinking vs. Feeling, and Judging vs. Perceiving. There are 16 types, such as ENTP and ISFJ, that largely identify each person's set of preferences for how they take in information and make decisions. Unfortunately, for users of the MBTI, the preference names do not carry the same meaning as when the words are used in everyday language. For example, Judging does not mean judgmental, and Perceiving does not mean perceptive.

Recent articles in the popular media have called the MBTI incorrect and misleading. The author and Wharton School professor, Adam Grant, is a particularly vocal critic. "There is a myth that extraversion and introversion is about where you get your energy from," Grant said. "We have good evidence that introverts get energized by the same things that extroverts do. It's just they need less of it to get energized and are more easily overstimulated." Grant goes so far to say that the test "gives people an inaccurate understanding of themselves."[8]

Many people who complete the MBTI do not accept the results, especially when their scores do not show a clear preference. The underlying Jungian theory asserts that each person has a preference for one type from each scale. But most people's scores fall in the middle ranges and do not show "clear preferences." More scientifically valid measures, such as those based the Big Five factor model, treat Introversion and Extraversion as a single scale and provide valid descriptions for people in the midpoints. People who resist being forced into an MBTI Thinking or Feeling preference can find support in recent neuroscience research that demonstrates the biological impossibility of removing emotion from decision making.[9]

Many people also criticize the MBTI because it does not offer an easy way to apply knowledge gained by the assessment to improving interactions among the types. At the consulting firm McKinsey & Company, which has been a long-time user of the test, results are used to give colleagues a window into the behavior of others, without expecting any kind of accommodation to occur. An article in the *Financial Times* quotes a former McKinsey executive who disdained the test and felt no remorse in using it to get out of certain obligations: "I could always just say, Hey guys, sorry, I'm an 'I' [for Introvert, a minority at the firm] ...That's a totally reasonable excuse at McKinsey."[10]

The Core Strengths SDI 2.0 Advantage

At Core Strengths, we often hear that people who took the MBTI cannot remember their results. Or if they do remember their 4-letter type, they don't remember what it means, so they do not even try to use the results at work. SDI 2.0 results have high face validity, are memorable, and easy to apply to relationships. Furthermore, the SDI 2.0 is based on an entirely different theory. While the MBTI reports on a set of four independent preferences, the SDI 2.0 explains the way core motives blend in every person, how these motives change in conflict, and how people can improve

their relationships. SDI 2.0 shows how people can make choices about using their strengths, or adapt their communication style, in ways that are authentic and congruent with their underlying motives.

HOGAN AND HOGAN ASSESSMENTS

Hogan assessments in their various forms are based on the work of Drs. Robert and Joyce Hogan, early members of the industrial-organizational psychology movement. Their work is based on socio-analytic theory, which maintains that the core of personality is based on evolutionary adaptations around status hierarchies. That roughly means that how people represent themselves to others has a greater effect on their behavior than internal personality traits.

The Hogans claim to be among the first to link human personality with a person's effectiveness within an organization, so it makes sense that their assessments are often used in selection processes to identify which employees are best suited for development and promotion, to uncover career-limiting factors among the executive team, or to simply weed out ineffective managers.

In one of Hogan's most popular assessments, people respond true or false to statements such as "I hold grudges for a long time" and "I was born to do great things." The overall results provide participants information about their "bright side," how they tend to behave on good days, as opposed to their "dark side," how they behave when faced with challenges and stress.

The Hogan assessment comes with a high price tag, one reason it's more often used for executive-level development. The risk associated with such targeted assessments for only a few key people is that you may lose the opportunity to create a common language that can be used to improve communication throughout the organization. The amount of detailed information provided by

Hogan can also be overwhelming for all but the most diligent participants. The test itself takes an hour and its reports are comprehensive and detailed, both of which imply a significant investment in time (something executives tend to lack).

The Core Strengths SDI 2.0 Advantage

The bright vs. dark distinction Hogan makes is quite different from how we view people. SDI 2.0 results describe motives under two conditions, when things are going well and when there is conflict. But conflict can be effectively managed to gain clarity, focus energy, restore relationships, and drive needed change.

The SDI 2.0 does not measure people's skills or point out deficiencies that would disqualify them from advancement. Instead, it offers a common language that people can use as they collaborate to achieve results.

STRENGTHS, AS VIEWED BY CLIFTON AND BUCKINGHAM (STANDOUT)

The father of the strengths-psychology movement is American psychologist Don Clifton. After teaching educational psychology, Don Clifton left academia to form a company focused on designing interview questions that would help organizations select the best candidates for jobs. He later purchased Gallup, the company famous for its opinion polling. His 2001 book, *Now, Discover Your Strengths*, co-authored with his protégé, Marcus Buckingham, introduced the StrengthsFinder Profile assessment.

Based on the large body of data collected over many years by the Gallup Corporation, Clifton and Buckingham categorized 34 strengths (or success themes) and developed an assessment to identify the top five in every

individual. They believed that people would achieve greater success by focusing on their current strengths, instead of struggling to develop others that wouldn't come as easily.

After splitting with his mentor, Buckingham developed the StandOut Assessment, building on his previous work with Clifton at Gallup. With the StandOut assessment, Buckingham further refined that view by identifying Nine Strengths Roles, rather than the 34 used by Clifton. In the assessment associated with the StandOut book, only a person's two top "strengths roles" are revealed. For those who want to know how the other strengths stack up, there is an additional fee and the company recommends ongoing work with a certified strengths coach to get the most out of the material.

While the idea of organizing one's professional life around key strengths that come easily is appealing (who wouldn't like to spend their days doing things they enjoy and find easy?), the material does not provide practical ways to apply it when working in relationship with other people — or simply rising to occasions where the circumstances require you to exercise non-preferred strengths. The real world is where StrengthsFinder (since renamed CliftonStrengths assessment) and StandOut can fall short. Speaking up in a meeting to represent an important perspective that's been overlooked might not be your strength, but it might be the right thing to do to get the result you want. Likewise, calmly listening to the concerns of a disgruntled employee may push you out of your comfort zone, but it helps to identify the root cause so the problem can be solved and the relationship can be preserved.

The Core Strengths SDI 2.0 Advantage

Core Strengths and CliftonStrengths may share a word, but we don't define it the same way. Buckingham has circularly defined a strength as "Whatever makes you feel strong." Both Clifton and Buckingham see strengths as talents — and advise that people orient their roles to use their talents. That makes sense, but it can have the unintended effect of limiting people's development because they aren't encouraged to try new things. At its worst, relying on your top strength is like grabbing a hammer from your toolbox and asking "What needs pounding?" To be most effective, you need first consider the job to be done then select the tool.

We connect every strength to individuals' underlying motives to help them find personally meaningful and compelling reasons to bring any strength to a situation and get better **results through relationships.**

Core Strengths has an entirely different point of view. First, strengths are behaviors that people use in pursuit of desired results. Whether we are effective and productive with our strengths depends on our ability to bring the right strength to the situation and the relationship. Like CliftonStrengths, we also acknowledge that well-intended strengths, when overdone, can limit our effectiveness. For example, it's great to be supportive of others. That's a strength. But we all know people who are so supportive of others that they don't take care of themselves. Too much of a strength is simply not a strength when it causes harm to oneself or others. Furthermore, SDI 2.0 shows how people have access to the full array of strengths. We connect every strength to individuals' underlying motives to help them find personally meaningful and compelling reasons to bring any strength to a situation and get better results through relationships.

A Brief History of SDI 2.0

Our organization was founded in 1971, by Elias H. Porter, Ph.D. The original name was Personal Strengths Assessment Service. Porter had been using his assessment in clinical and educational settings for some time, and he opened the business to accommodate his past students who wanted to use the assessment in their work.

The journey to the SDI started much earlier. Porter was deeply involved in the development of Client-Centered Therapy,[11] which paved the way for the strengths movement that followed many years later. He worked closely with Carl Rogers at the University of Chicago's Counseling Center, and his research was influential in the early development of training programs for the Veterans Administration at the end of World War II. During this time, Porter was captivated by psychoanalyst Erich Fromm's descriptions of non-productive personality types. He was also influenced by theories of interpersonal interactions, such as Karen Horney's concepts of moving toward, against, and away from others, and Eric Berne's description of various roles in Transactional Analysis. Later, Porter worked for the Rand Corporation, focusing on projects that trained people to operate complex systems.[12] This diverse experience in research, clinical, government, and business settings gave rise to his Relationship Awareness Theory, upon which the Strength Deployment Inventory is based.

Tim Scudder joined the company in 1995, which had by then been renamed Personal Strengths Publishing. His early efforts in product development were primarily focused on creating better, more current versions of Porter's early work and leading the company into the digital age. Tim completed his Ph.D. in Human and Organizational Systems in 2013, and his research provided strong support for SDI's statistical and conceptual validity. His research and developmental agenda has, through many iterations, resulted in the SDI 2.0.

CORE STRENGTHS AND SDI 2.0

Core Strengths, as an organization, helps to improve millions of working relationships every year, around the world, in over 20 languages. Leaders, talent development professionals, and team members find the insights from the SDI and training indispensable as they navigate their working relationships. From scrappy startups to the largest publicly traded companies to universities and governmental institutions, the language of SDI provides a shared frame of reference to assess people's motives, bring the right strengths to situations, improve communication, and deliver better results through relationships.

The SDI 2.0 Today

SDI 2.0 is about whole persons, what they bring to work, and how they can connect and engage their core motives and values as they strive to work productively with others. It powers our Core Strengths Results through Relationships training program, and the Relationship Intelligence, cloud-based platform, which embeds a powerful, common language in the culture of any organization. We believe that assessment and training are not simply events; they are early parts of a process that improves the quality of working relationships over time, one conversation at a time.

In 2019, our Relationship Intelligence platform will roll out more robust aspects that provide deeper analytics to support a range of performance management and talent management goals, as well as broader impact measurements.

At Core Strengths, we believe that business success is the result of open, highly functional relationships—within and among teams and between leaders and reports. We have also found that personality assessments, when applied to daily interactions, among colleagues and between leadership and reports, have a profound effect on both company culture and business performance.

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"The implementation of the Core Strength training has been transformational to our organization. Core Strengths provides our workforce with the tools they need to be better leaders, better teammates, strengthen relationships and get better results."

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TIM PERLICK

SENIOR. DIRECTOR, PROFESSIONAL DEVELOPMENT, CME GROUP (CHICAGO MERCANTILE EXCHANGE)

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Dr. Tim Scudder is a principal at Core Strengths in Carlsbad, California. He is the world's leading expert on Relationship Awareness Theory and the author of: SDI 2.0, *Results through Relationships*, *Have a Nice Conflict*, and *The Leaders We Need*. Tim is Core Strengths' primary researcher and author. He also serves on the board of the Alliant International University California School of Management and Leadership.

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