Useful Assessments for
Business Coaching Applications

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Assessments greatly assist in coaching business executives. They can be individually debriefed and referred to as appropriate throughout the coaching engagement. Most assessments require certifications, and if your business is doing well, the time and money involved are well worth the learning. The fact that you offer them also can enhance your proposals and provide a means for differentiating you in the marketplace. Following are some assessments I use in my practice, with descriptions modified to my business audience:

A. Energy Leadership Index®

Developed by Bruce D Schneider of iPEC, this assessment provides an overall measure of the strength of leadership attitudes from which the leader operates. This "energy" is distributed on 7 Levels of Energy—all related to leadership—under normal circumstances and under stress. These are the default styles developed over time by leaders. This provides leaders with clear information about where they tend to focus their leadership style.

Presented in line graph format shown in the introduction, the levels can produce positive (anabolic) or negative (catabolic) impacts on leadership success. The basic question, whatever the level is, "How is it working for you?" If it is not working, you can actually choose to "show up" differently and more in unison with what makes you, your direct reports, and your company successful. Used in coaching, this assessment provides a basis for learning how to choose the appropriate leadership approach for the situation.

Coaching around the 7 Levels involves exploring where the individual falls with regard to each level and what is nudging the individual to remain in negative, unsuccessful, or under-successful leadership patterns. Generally, these are inner and outer blocks that limit success.

Below, are the blocks:

- **Gremlins**—This is the inner critic that reveals itself in negative thinking patterns. You may hear comments such as "I can't do this thing called management," "Basically, I'm a screw up," or "I'm dead in the water if they ever catch on that I'm faking it."

- **Assumptions**—These are opinions that if it happened before, it'll happen again. Comments around assumptions could be "I had a coach years ago and it didn't work," "Why try something different?" "The company has tried this market approach in the past and it was a complete failure. Why try again?"

- **Interpretations**—These are interpretations in the present that reflect one self-generated viewpoint. Examples are "My boss doesn't like me," "My direct reports don't respect me," or "The company sees me as non-promotable."

- **Limiting beliefs**—These are beliefs about the world, your environment or situation, people, etc., that stand in the way of success. Some limiting belief examples are "Leaders are tough," "Leaders tell people what to do," "Leaders don't show emotion," or "Leaders are born, not made." o Outer blocks—These are anything beyond your control such as policy and regulatory requirements, insufficient training, lack of funding, etc.

B. The 360˚ Feedback System

iPEC offers a 360º assessment. A 360º feedback tool is a process by which multiple people in your life rate you according to their observations of you. These raters can come from any aspect of your life. In a debrief, an assessor looks at the combined results of all raters and gives the client feedback of what they said, and shows them the comparison against how they rated themselves. Usually, the more raters the client has, the more accurate the picture.

360's are very popular in corporate America and have applications for small business, groups, families, and even couples. By doing a 360, you can understand how you are seen through others' eyes, and how well your intentions and image are coming across. Most importantly, the information you receive from your raters offers you many opportunities to improve your performance on the job, as well as to improve the relationships themselves.

To debrief the 360, go through the regular ELI debrief, then review the self and raters' ratings, noting any differences and seeing how the client's overall energy could contribute to the answers. For example, the client's Energetic Stress Reaction shows a default of 1 and a secondary level of 2. How does that affect the client's self-ratings? Those of the raters? What would be the value of removing that catabolic energy under stress?

You can also discuss how the client's intentions and actions may not be matching, as well as whether others are seeing the client the way the client sees himself or herself. If the client self-rates higher or lower on items than the raters do, explore why. For example, the client says she doesn't recognize other's strengths - yet they say the client does. What is going on, energetically? The 360 debrief opens up great discussions.

B. Hogan Assessments (hoganassessments.com)

Hogan produces a line of top quality and fully validated assessments ideal for business executives, managers, and high potentials. Further, Hogan's database contains information from hundreds of thousands of working adults across multiple businesses worldwide. Hogan certification requires on-site training at various locations throughout the world. In the U.S.; training is most common in New York, Atlanta, and Minneapolis. Also, they provide a continuing education program that is more extensive than similar companies. All assessments are extrapolated from one questionnaire. Here are the five assessments I mostly use:

1. Hogan Development Survey (HDS)

This is a measurement of 11 tendencies that, if unchecked, can destroy careers. Hogan calls these risks the dark side of personality. They are normally suppressed and emerge only when the leader is under stress, caught up in unbridled power, or even overly complacent. Although the 11 risk categories vary from person to person, some occur more often in certain industries. The extent to which any of the risks are present in any one individual is measured by the HDS, and coaching around the risks is essential to long-term success. About 50% of senior leaders fail due to a blend of these high traits.

Below are the 11 traits the HDS measures.

- **Excitable:** Initially enthusiastic about people or projects and then becoming disappointed with them
  Result: lack of persistence

- **Skeptical**: Socially insightful but cynical and overly sensitive to criticism
  Result: overly suspicious of others and defensive o

- **Cautious**: Concerns being overly worried about being criticized
  Result: resistance to change and reluctance to take chances

- **Reserved:** Concerns lacking interest in or awareness of the feelings of others
  Result: seems to be a poor communicator

- **Leisurely**: Being overly independent, ignoring others' requests, and becoming irritable if they push the envelope
  Result: stubborn, procrastinating, uncooperative, and aloof

- **Bold**: Inflated views of one's own competency and value
  Result: unable to admit mistakes or learn from experience

- **Mischievous**: Being dramatic, engaging and attention seeking
  Result: trouble maintaining commitments and learning from experience

- **Colorful**: Dramatic, engaging, and attention seeking
  Result: preoccupied with being noticed and may act bizarrely for attention

- **Imaginative**: Thinking and acting in interesting, unusual, and even eccentric ways
  Result: creative but possibly lacking in judgment

- **Diligent:** Conscientious, perfectionistic, and hard to please
  Result: tends to disempower self

- **Dutiful**: Eager to please and reluctant to act independently
  Result: pleasant and agreeable, but reluctant to support subordinates

2. Hogan Personality Inventory (HPI)

This bright side assessment measures leadership potential on seven unique scales. Below are potential success traits the executive naturally brings to the table.

- **Adjustment:** Degree to which a person is calm and even-tempered or moody and volatile .High scorers seem confident, resilient, and optimistic. Low scorers seem tense, irritable, and negative.

- **Ambition**: Evaluates the degree to which a person seems leader-like, seeks status, and values achievement High scorers seem competitive and eager to advance. Low scorers seem unassertive and less interested in advancement.

- **Sociability**: Degree to which a person appears talkative and socially self confident High scorers seem outgoing, colorful, and impulsive. Low scorers seem reserved and quiet; they avoid calling attention to themselves and do not mind working alone.

- **Interpersonal Sensitivity**: Reflects social skill, tact, and perceptiveness High scorers seem friendly, warm, and popular. Low scorers tend to be practical, focused, and able to concentrate for long periods.

- **Prudence**: Concerns self-control and conscientiousness High scorers seem organized, dependable, and thorough; they follow rules and are easy to supervise. Low scorers seem impulsive and flexible, resist rules and close supervision; but may be creative and spontaneous.

- **Inquisitive**: Degree to which a person seems curious, adventurous, and imaginative. High scorers tend to be quick-witted and visionary and low scorers tend to be practical and focused.

- **Learning Approach**: Reflects the degree to which a person enjoys academic activities and values education as an end in itself. High scorers tend to enjoy reading and studying. Low scorers are less interested in formal education and more interested in hands-on learning on the job.

3. Motives, Values, Preferences Inventory (MVPI)

This report measures the individual's core values and how they potentially impact the leadership role in four ways: drivers and motivators, organizational fit, leadership style and culture, and unconscious biases. These are referred to as ***inside*** measurements.

- **Recognition:** *Indifferent to visibility vs. wanting to be noticed.* High scorers seek fame, appreciation, and acknowledgment, while low scorers are unconcerned about official attention.

- **Power:** *Indifferent to achievement/competition vs. being perceived as influential.* Low scorers typically follow, while high scorers tend to take charge and forge ahead.

- **Hedonism:** *Serious and self-disciplined vs. fun loving and enjoyment seeking.* Low scorers are restrained and self-disciplined; high scorers are fun loving and want to enjoy work.

- **Altruistic**: *Valuing self-help vs. wanting to help others.* Low scorers believe in self-reliance; high scorers selflessly extend help to others.

- **Affiliation**: *Independent vs. wanting social contact.* Low scorers prefer to work alone; high scorers search for interaction, social acceptance, and networking.

- **Tradition**: *Valuing progress and change vs. history and convention.* Low scorers challenge the status quo and are open to change; high scorers respect hierarchy, authority, and the ways of the past.

- **Security**: *Risk tolerant vs.risk averse.* Low scorers easily tolerate uncertainty and risk; high scorers value defined clarity and predictability.

- **Commercial**: *Indifferent to financial matters vs. focused on commercial outcomes.* Low scorers have modest financial aspirations; high scorers pay close attention to financial matters.

- **Aesthetics**: *Practical vs. creative.* Low scorers care about functionality; high scorers care about creative self- expression and the look and feel of their work.

- **Science**: *Intuitive vs. analytic.* Low scorers prefer quick, intuitive decisions; high scorers prefer deliberate, data based decisions.

4. **High Potential Report:** Helps emergent leaders to become more effective

B. Gallup Strengths Finder: (gallupstrengthscenter.com/StrengthsFinder)

The Gallup Organization developed this assessment to help increase leadership effectiveness by helping leaders understand their basic strengths and associated behaviors. The Signature Themes Report provides and prioritizes the individuals 5 most dominant success themes, helping them understand and develop the natural talents they bring to their company.

C. Myers-Briggs Type Indicator, Step II: (CPP.com)

The MBTI assessment is an application of Carl Jung's theory of personality types. It is widely used throughout business. The theory behind the instrument suggests that we have opposite ways of directing and receiving energy (introversion or extraversion), taking in information (Sensing or Intuition), deciding or coming to conclusions about that information (Thinking or Feeling), and approaching the outside world (Judging or Perceiving).

D. Thomas-Kilmann Conflict Mode Instrument: (CPP.com)

This assessment measures an individual's behavior in conflict situations—that is, situations in which the concerns of two people appear to be incompatible. In conflict situations we can describe a person's behavior along two basic dimensions: (1) assertiveness, the extent to which the individual attempts to satisfy his or her own concerns, and (2) cooperativeness, the extent to which the individual attempts to satisfy the other person's concerns. These two dimensions of behavior can be used to define the five basic methods of dealing with conflict. In coaching, this helps the individual know his or her conflict default, assess the degree to which it achieves the desired result, and if not, choose a more successful alternative. The five methods for dealing with conflict are Competing, Collaborating, Compromising, Avoiding, and Accommodating.

Credit: The concepts inherent in this article are the author's interpretation of materials issued by iPEC®.