Think » Plan » Grow!

# Using Personality Assessment Tools: Understanding Your Team

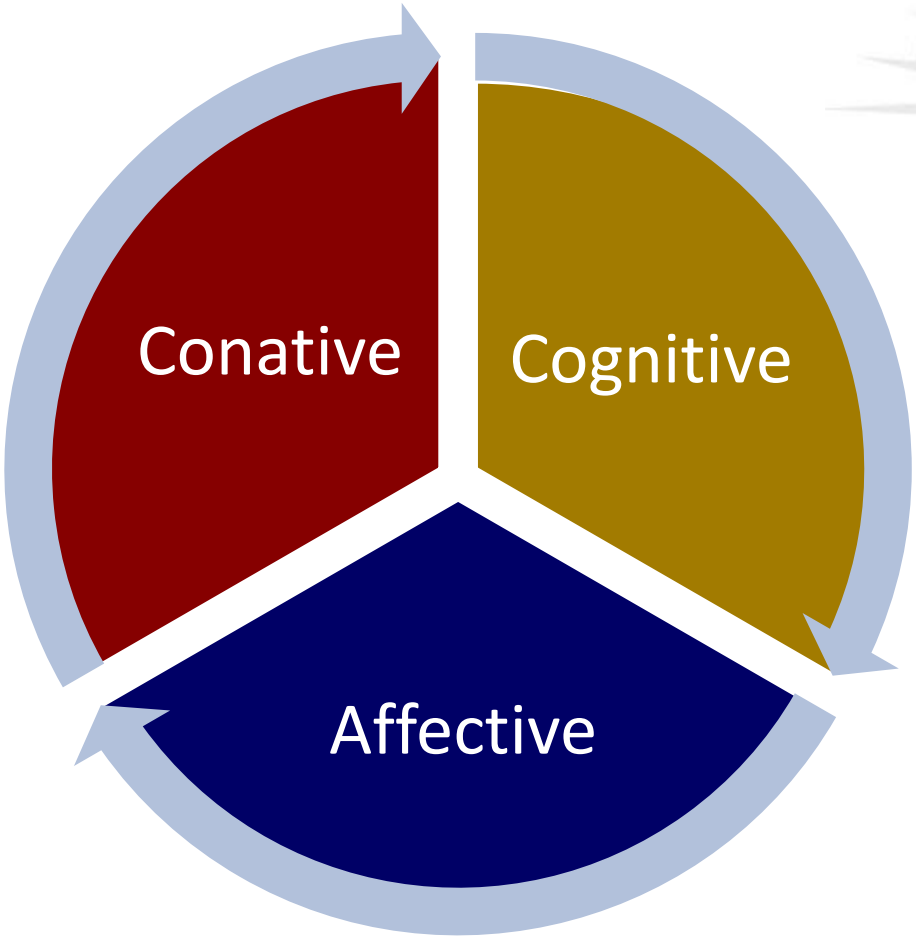
Presented by:

Sandra Wiley and Tamera Loerzel

# Speakers

# Agenda

- Identifying Personality and Instinctive traits – How and Why?
- Common assessment tools to help you identify your personality type
- The Kolbe Index
- Myers-Briggs
- Story time – Peer Success Stories


Conative
Cognitive
Affective

# Cognitive = Thinking

**Assessed by IQ, SAT, Wonderlic, skills tests**

- **Learned abilities**
- **Knowledge from education, training, experience**
- **Reasoning**

# Affective = Motivation, Feelings

**Meyers Briggs**

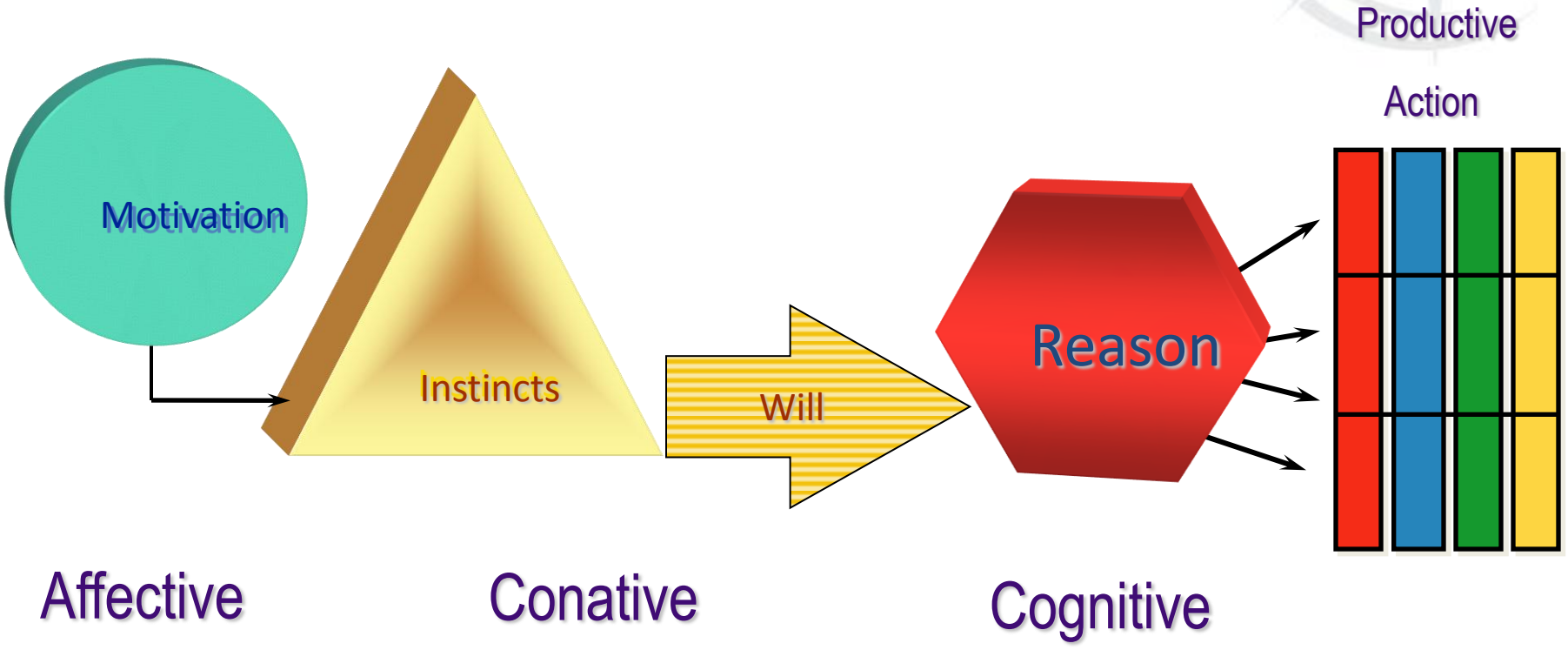
- Personality
- Values
- Social style
- Preference

# Conative = Instinct-based actions

**Kolbe Index**

- Innate Paths to Success
- Modes of operation ( MO )
- Creative power
- Form of productivity

# Productivity Process

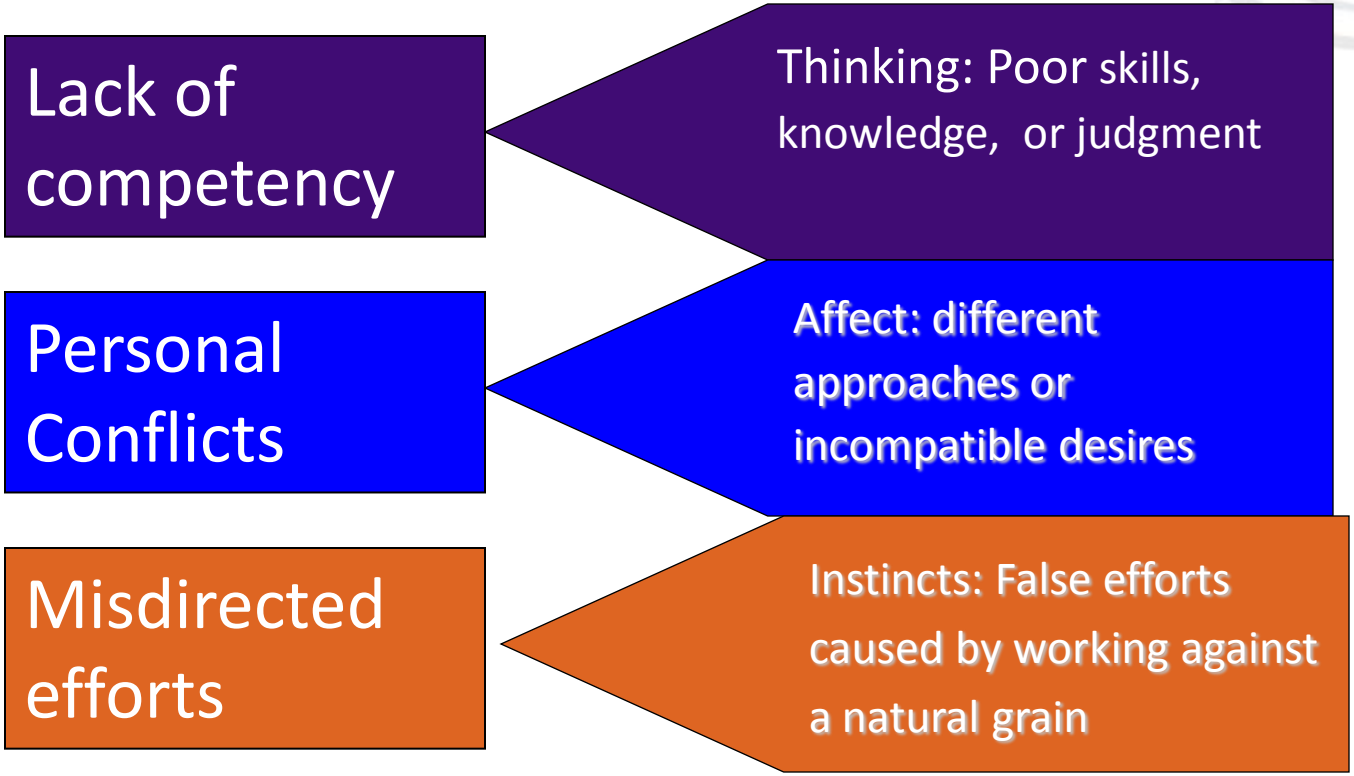


# Polling Question

- What areas of the productivity process are you identifying and encouraging today in your firm?
  - Cognitive (Thinking)
  - Affective (Feeling)
  - Conative (Doing)
  - All Three
  - None of the Above

# People Challenges

## How thinking, feeling, and acting on instinct impact performance



# Common Assessment Tools

- Cognitive – Wonderlick, Firm Developed
- Affective – Meyers-Briggs, DISC, Predictive Index, Strengths Finder
- Conative - Kolbe

# How to Choose?

- What are you trying to accomplish?
- What is your firm culture?
- What do you know already?
- What do you need to know in order to fix the challenges in the firm?

# Polling Question

- Do you use an assessment tool in your firm today? If so, which one?
  - Meyers-Briggs
  - Kolbe
  - Other
  - I don't use any assessments today
  - I am not sure

# KOLBE

# *The Kolbe Method*

# Proven Answers

- Identifies individuals' instinctive strengths for increased productivity
- Ensures having the right person in the right job
- Reduces selection costs while increasing retention rates
- Improves communication and job satisfaction
- Pinpoints areas of organizational stress and prescribes solutions
- Builds teams with the right talents for high performance

# Value of Kolbe

- Individual – Children and Adults
- Improved Communication
- Sales Profile
- Coaching Profile
- Career Profile
- Hiring Decisions
- Diagnosing Team Viability

# Personal Application

# 4 Action Modes

MOs are formed by

## Kolbe Action Modes

### Fact Finder

Gathering and communicating information

### Follow Thru

Sorting and storing information

### Quick Start

Dealing with risk and unknowns

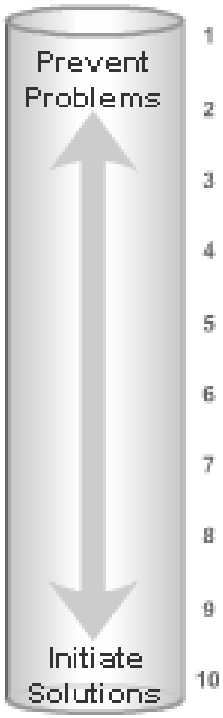
### Implementor

Handling space and tactile efforts

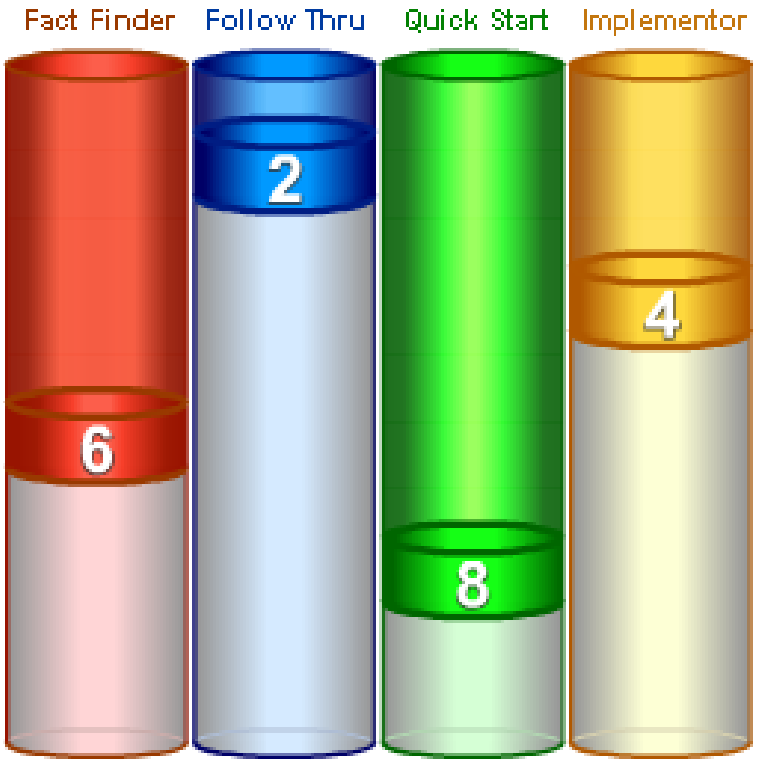
# Kolbe A™ Result

## James Smith

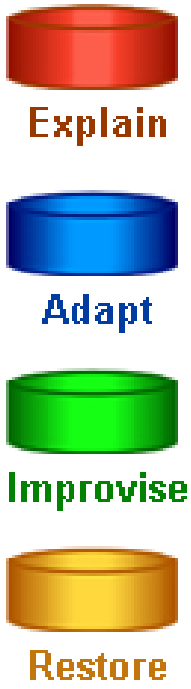
**Continuum**




**Kolbe Action Modes™**

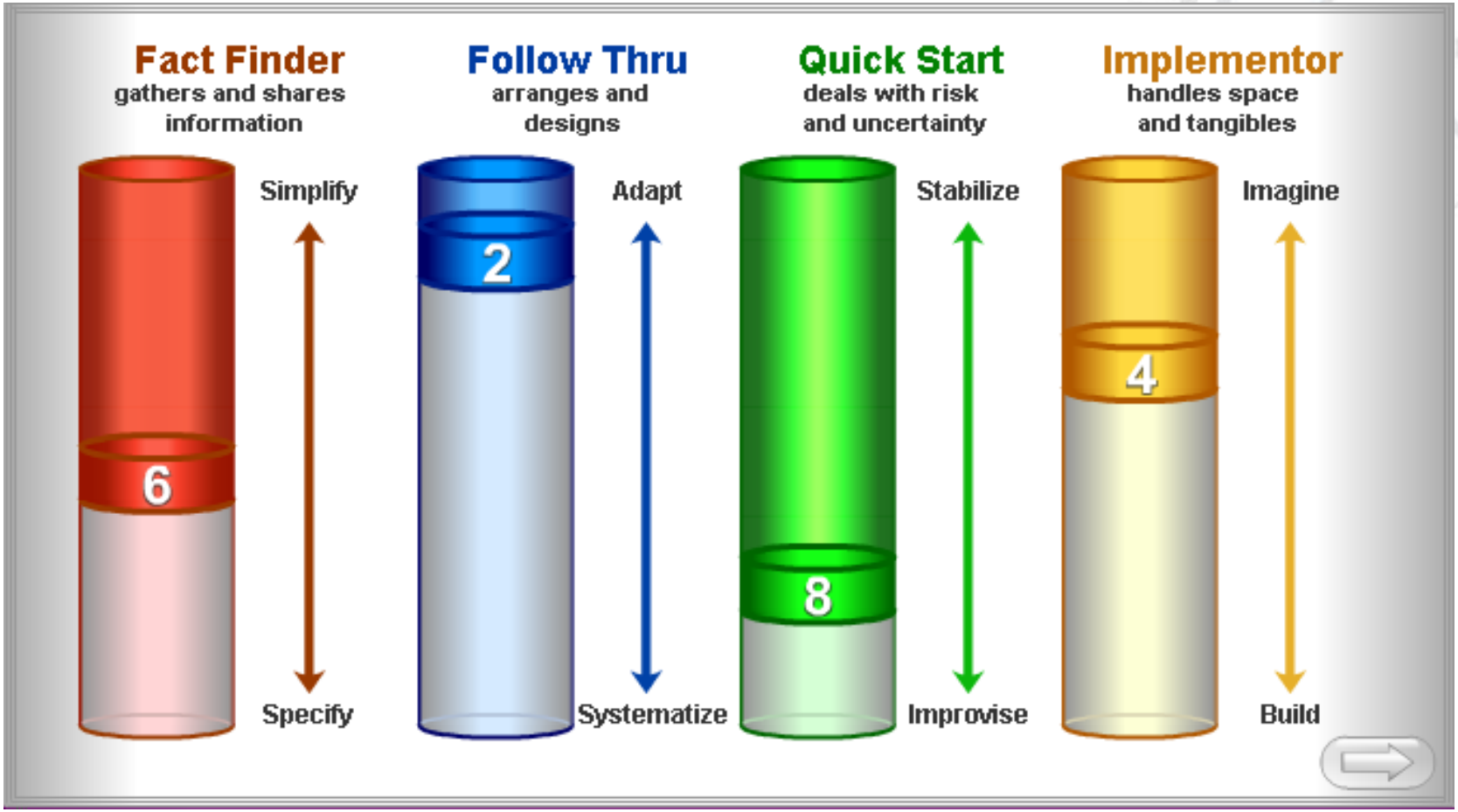



**Your Kolbe Strengths**

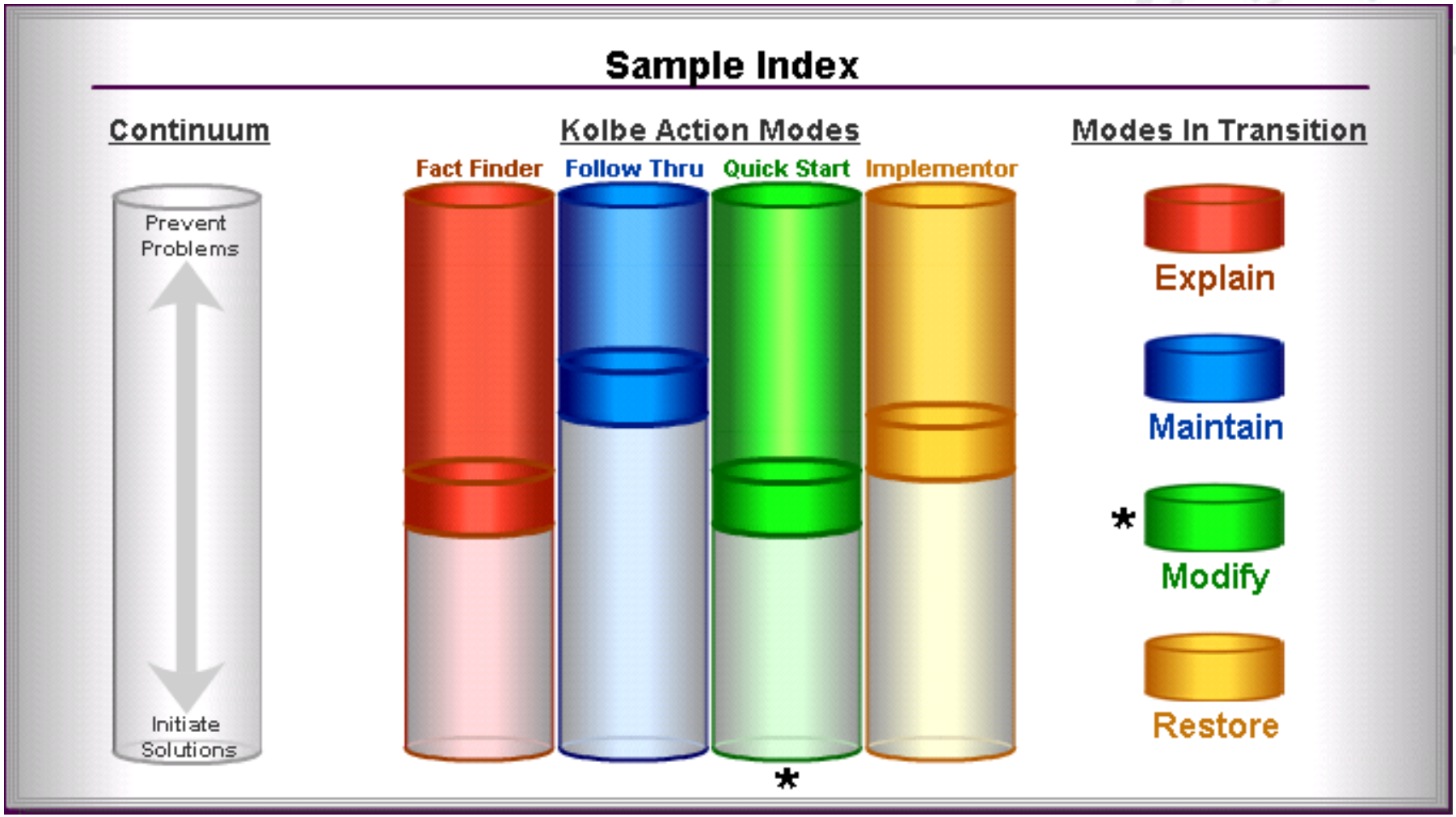



*Your Kolbe result is so individualized, only 5% of the population is likely to have one just like it.*

# How you take action in these four instinct-based Action Modes® defines your MO



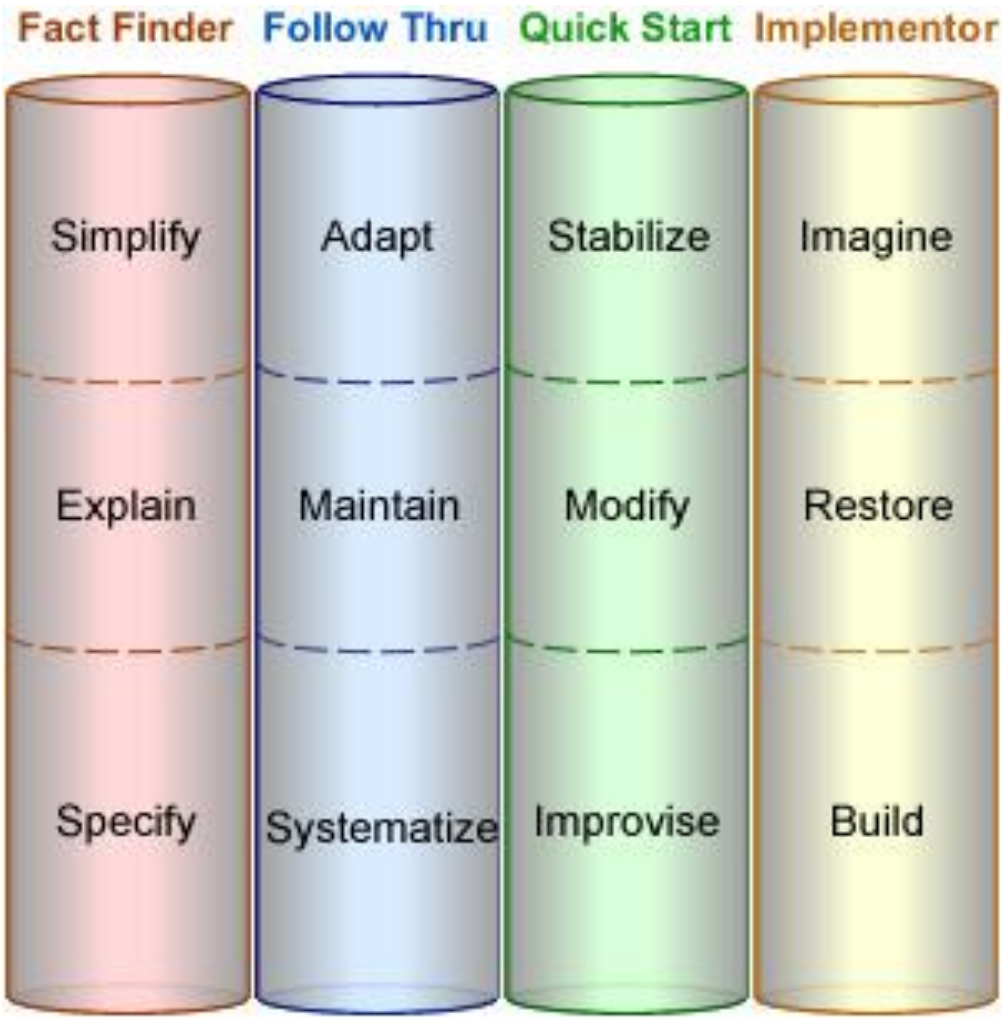
# Kolbe A™ Index Transition Result



# 12 Kolbe Strengths

**Everyone has a strength in each mode.**

**Diversity in the combination of strengths creates a multitude of MOs.**



# Methods of Communication

**Fact Finder:** written words with data, citations, analogies, case studies, verifications

**Follow Thru:** visuals with graphs, charts, diagrams, posters, outlines, maps, similes, patterns

**Quick Start:** spoken words with ad libs, improvised metaphors, visuals, bullet points, intense colors

**Implementor:** tangibles with props, models, demonstrations, texture, machinery, body language

# Sense of Time and Conation

**Fact Finder:** focuses on the past, builds on experience

**Follow Thru:** integrates past, present, future builds timeline

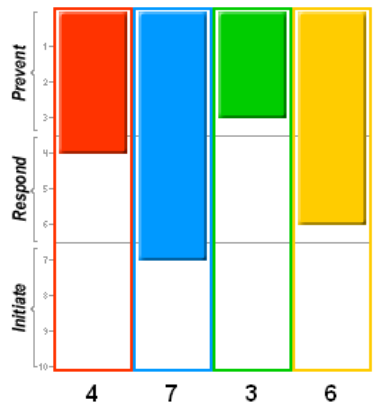
**Quick Start:** focuses on the future, goes right to the bottom line, sets deadlines

**Implementor:** focuses on present preserves and protects the best of today

# Coaching, Sales and Career Solutions

## Coaching for Success

**Andrew Rich**




Fact Finder: Explain

Follow Thru: Classify

Quick Start: Stabilize

Implementor: Restore

Natural Advantage: Manufacturer

Understanding a person's MO is the first step toward improving their performance. How to leverage that understanding is the subject of this Coaching Report. The advice presented here is an explanation of how this person will work best: an explanation of what this person's Path to Success will look like.

### Initiating Follow Thru

| | |
|---|---|
| **Use of time** | Sequences events and provides continuity, paces oneself; sets a rhythm for efforts and coordinates with others. |
| **Communicate Using** | Charts and graphs |
| **Storing Information** | Alphabetically |
| **Learning Needs** | Learns the theory or formula. |
| **Goal Attainment** | • Integrating systems<br>• Developing worst-case scenarios<br>• Assuring a sense of quality |

# Personal Applications

Relationship Decisions

Parenting Decisions

Financial Decisions

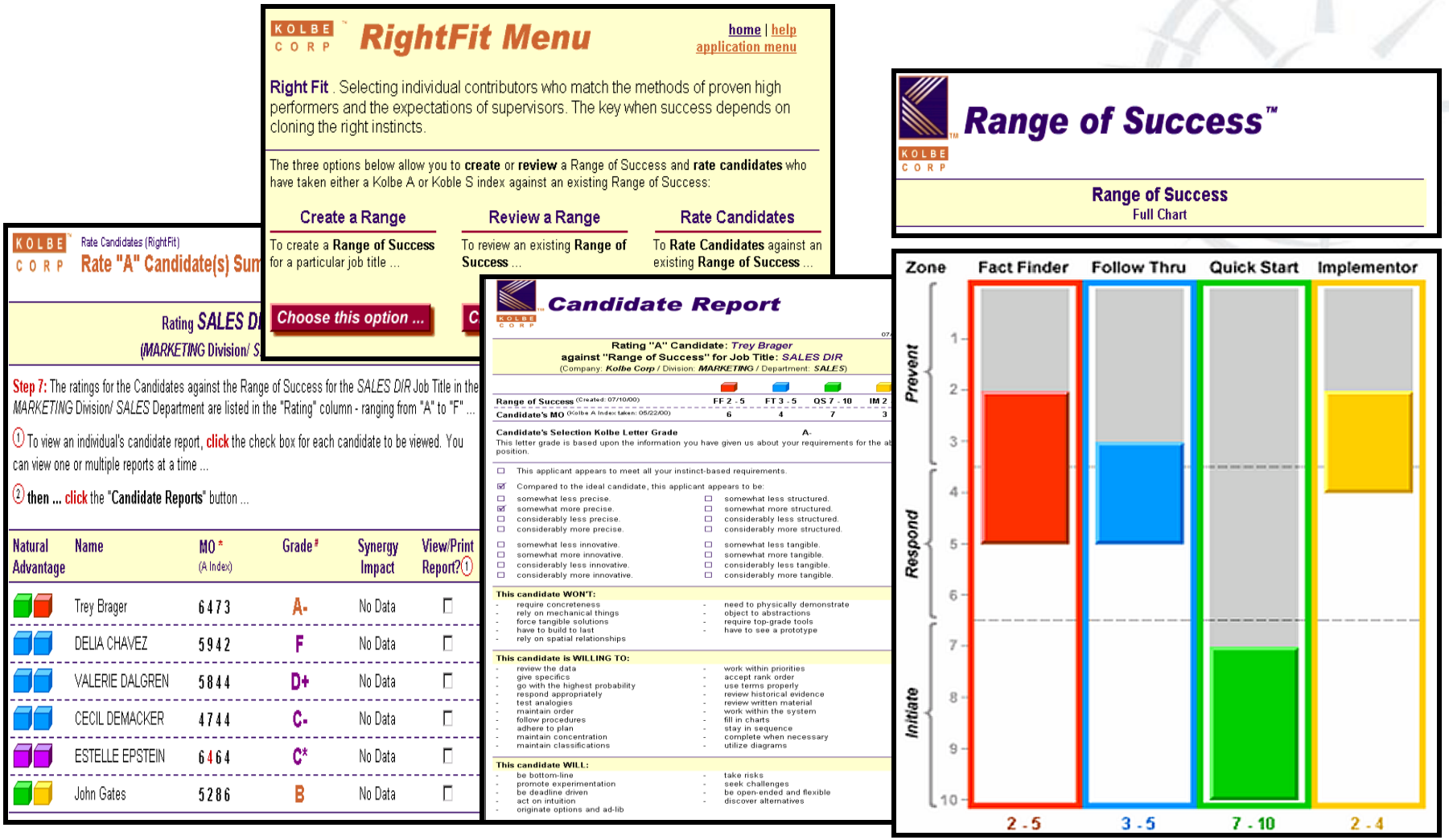
Career Decisions

# Hiring Application

# Kolbe RightFit™

- Ease of use
- Predictive
- Internet-based
- Screening Tool
- Meets and exceeds EEOC requirements

# Kolbe Selection Process



KOLBE CORP **RightFit Menu**

home | help
application menu

**Right Fit** . Selecting individual contributors who match the methods of proven high performers and the expectations of supervisors. The key when success depends on cloning the right instincts.

The three options below allow you to **create** or **review** a Range of Success and **rate candidates** who have taken either a Kolbe A or Koble S index against an existing Range of Success:

| Create a Range | Review a Range | Rate Candidates |
|---|---|---|
| To create a **Range of Success** for a particular job title ... | To review an existing **Range of Success** ... | To **Rate Candidates** against an existing **Range of Success** ... |
| Choose this option ... | | |

KOLBE CORP Rate Candidates (RightFit)
**Rate "A" Candidate(s) Sum**

Rating *SALES DI*
(*MARKETING* Division/ *S*

**Step 7:** The ratings for the Candidates against the Range of Success for the *SALES DIR* Job Title in the *MARKETING* Division/ *SALES* Department are listed in the "Rating" column - ranging from "A" to "F" ...

① To view an individual's candidate report, **click** the check box for each candidate to be viewed. You can view one or multiple reports at a time ...

② **then ... click** the "**Candidate Reports**" button ...

| Natural Advantage | Name | MO * (A Index) | Grade # | Synergy Impact | View/Print Report? ① |
|---|---|---|---|---|---|
| | Trey Brager | 6473 | A- | No Data | ☐ |
| | DELIA CHAVEZ | 5942 | F | No Data | ☐ |
| | VALERIE DALGREN | 5844 | D+ | No Data | ☐ |
| | CECIL DEMACKER | 4744 | C- | No Data | ☐ |
| | ESTELLE EPSTEIN | 6464 | C* | No Data | ☐ |
| | John Gates | 5286 | B | No Data | ☐ |

KOLBE CORP **Candidate Report**

Rating "A" Candidate: *Trey Brager*
against "Range of Success" for Job Title: *SALES DIR*
(Company: *Kolbe Corp* / Division: *MARKETING* / Department: *SALES*)

| | FF 2 - 5 | FT 3 - 5 | OS 7 - 10 | IM 2 |
|---|---|---|---|---|
| Range of Success (Created: 07/10/00) | | | | |
| Candidate's MO (Kolbe A Index taken: 05/22/00) | 6 | 4 | 7 | 3 |

**Candidate's Selection Kolbe Letter Grade** A-

This letter grade is based upon the information you have given us about your requirements for the al position.

☐ This applicant appears to meet all your instinct-based requirements.

☑ Compared to the ideal candidate, this applicant appears to be:

| | |
|---|---|
| ☐ somewhat less precise. | ☐ somewhat less structured. |
| ☑ somewhat more precise. | ☐ somewhat more structured. |
| ☐ considerably less precise. | ☐ considerably less structured. |
| ☐ considerably more precise. | ☐ considerably more structured. |
| ☐ somewhat less innovative. | ☐ somewhat less tangible. |
| ☐ somewhat more innovative. | ☐ somewhat more tangible. |
| ☐ considerably less innovative. | ☐ considerably less tangible. |
| ☐ considerably more innovative. | ☐ considerably more tangible. |

**This candidate WON'T:**

| | |
|---|---|
| - require concreteness | - need to physically demonstrate |
| - rely on mechanical things | - object to abstractions |
| - force tangible solutions | - require top-grade tools |
| - have to build to last | - have to see a prototype |
| - rely on spatial relationships | |

**This candidate is WILLING TO:**

| | |
|---|---|
| - review the data | - work within priorities |
| - give specifics | - accept rank order |
| - go with the highest probability | - use terms properly |
| - respond appropriately | - review historical evidence |
| - test analogies | - review written material |
| - maintain order | - work within the system |
| - follow procedures | - fill in charts |
| - adhere to plan | - stay in sequence |
| - maintain concentration | - complete when necessary |
| - maintain classifications | - utilize diagrams |

**This candidate WILL:**

| | |
|---|---|
| - be bottom-line | - take risks |
| - promote experimentation | - seek challenges |
| - be deadline driven | - be open-ended and flexible |
| - act on intuition | - discover alternatives |
| - originate options and ad-lib | |

KOLBE CORP **Range of Success™**

**Range of Success**
Full Chart

# Kolbe Index Results are Valid and Reliable

- Distinct from cognitive and affective measures.
- Independent of race, gender age or other criteria.
- Results showing probability of success are tied to job performance.
- 90% of modes of insistence remain the same on test-retest.
- 96% of cases show no change between zones on test-retest.
- Meets all standards of the American Psychological Association (APA)

# Team Strengthening Application

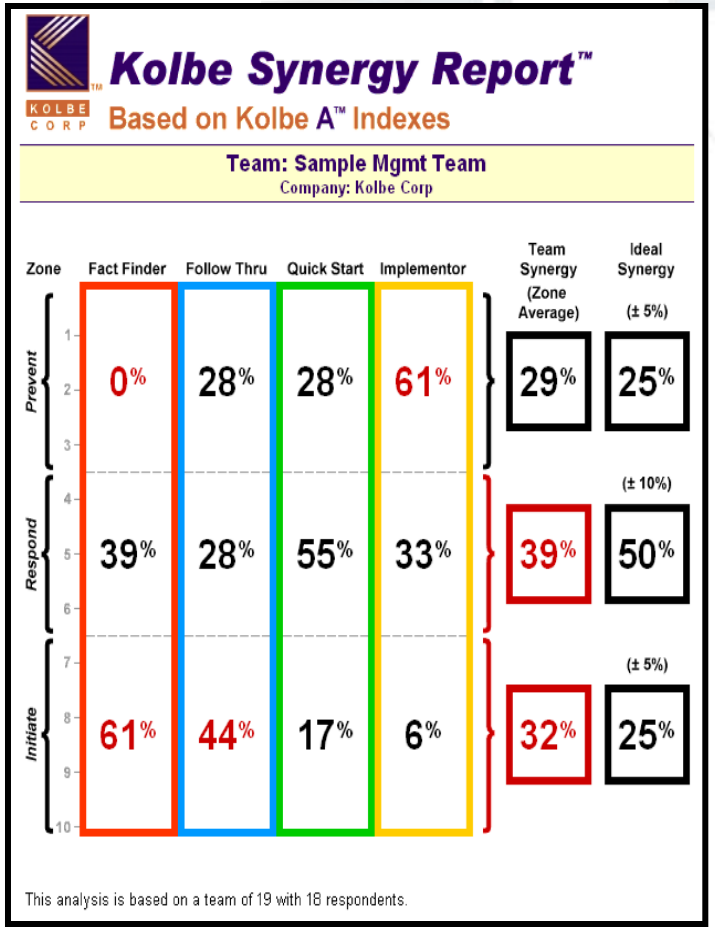
# Synergy Algorithm

Kolbe has proven:

- Without synergy, teams are more likely to fail.

Kolbe also makes synergy:

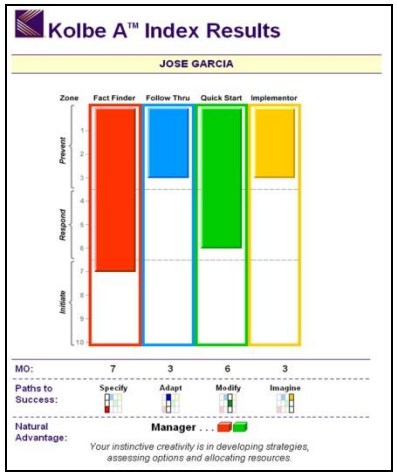
- Definable
- Quantifiable
- Predictable
- Improvable



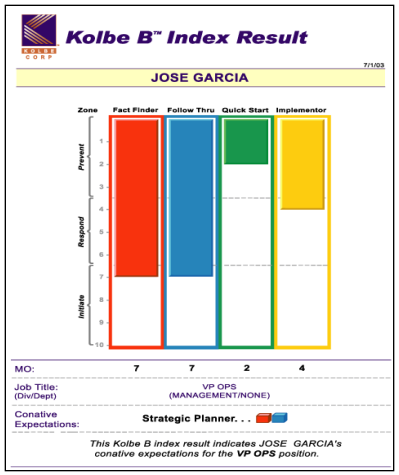
# Impediments to Team Productivity

- Cloning—Inertia
  - Need for different talents
  - Too Much of a good thing
- Conflict—Polarization
  - Differences in methodology
  - Accelerator/Brake Syndrome
- Mismatched Talents
  - Self perception
  - Third party requirements

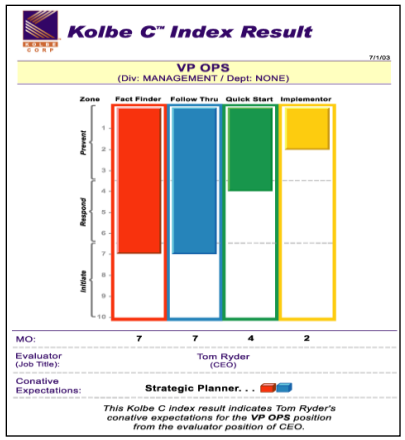
# Workplace Diagnostics




Kolbe A Index
Individuals' Realities




Kolbe B™ Index
Workers' self-Expectations

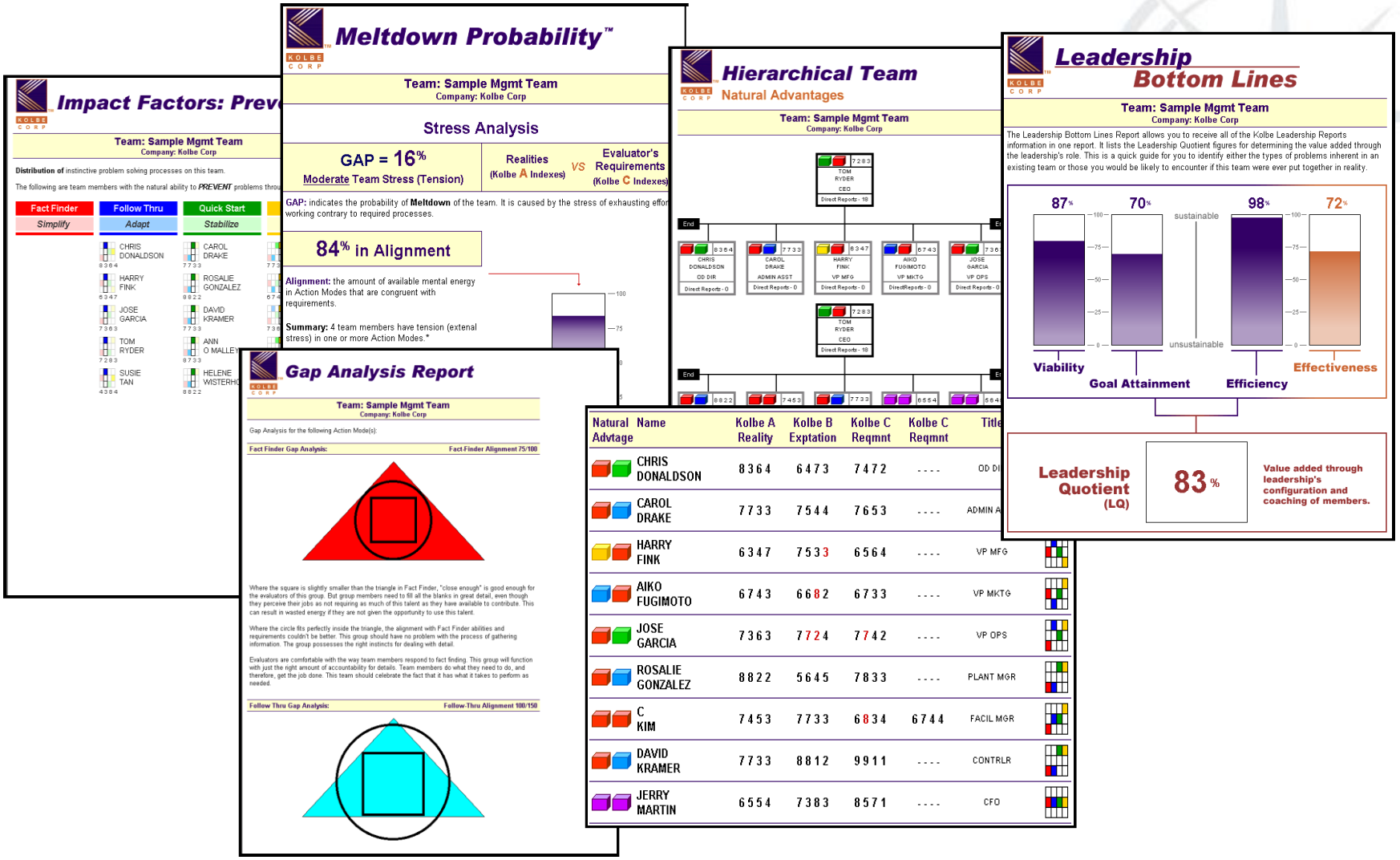



Kolbe C™ Index
Evaluator's functional Requirements

Significant differences among conative Realities, Expectations and Requirements cause over 70% of work-related stress.

# Kolbe Leadership Reports™

Think » Plan » Grow!



# Types of Conative Stress

- **Conflict**
  - Identified by: **Kolbe A Index ⇔ Kolbe A Index**
  - Occurs between two people with differing strengths
- **Strain**
  - Identified by: **Kolbe A Index ⇔ Kolbe B Index**
  - Internal struggle that occurs when a person's perception of their job does not match their strengths
- **Tension**
  - Identified by: **Kolbe A Index ⇔ Kolbe C Index**
  - Occurs when a job evaluator perceives a job as requiring different strengths than those of the current job holder

# True Team Definition

- Members work interdependently
- Reliance on others for contributions
- Success dependent on others
- Implications for team viability
  - Example A: Software Dev. Project Team
  - Example B: Basketball Team

# Work Group Definition

- Composed of individual contributors
- Come together for reporting purposes
- No continual reliance on work of others
- Defines group culture
  - Example A: Executive Management Group
  - Example B:  Bowling Team

# Kolbe Success Story

- Hiring Process Changes
- Communication Breakthrough
- Personal Application
- Team Analysis
- Productivity Increase

# Meyers Briggs

# Why Learn About Personality Types?

- Understanding your own personality helps you understand what "makes you tick"
  - You will have insights about why you behave, respond to others, process information, communicate and make decisions the way you do
    - As we discuss the different types defined by Myers-Briggs, you can "self-identify" as we go through each type (and complete the MBTI at a later time if you would like to do so)
  - You can then use this information to enhance your success and fulfillment in your work and relationships

# Why Learn About Personality Types?

- Understanding the type of other team members will:
  - Help you identify and leverage your team's strengths and address weaknesses or gaps
  - Ensure you're deploying team members to best fit their natural preferences, where possible
  - Help identify areas of similarities and differences so you can be informed when:
    - Communicating with each other
    - Coming to and agreeing on decisions
    - Developing processes
    - Deploying members of the team and creating development plans

# Myers-Briggs Key Type Concepts

- We use is the MBTI instrument because it helps enhance interpersonal communications
- The MBTI works under the premise that personality type is:
  - *Innate* and able to be *influenced* or moderated over time
  - *Observable*
  - *Not a box*
  - *Not an excuse*
  - An indicator of *preferences, not skills*
  - A *journey*



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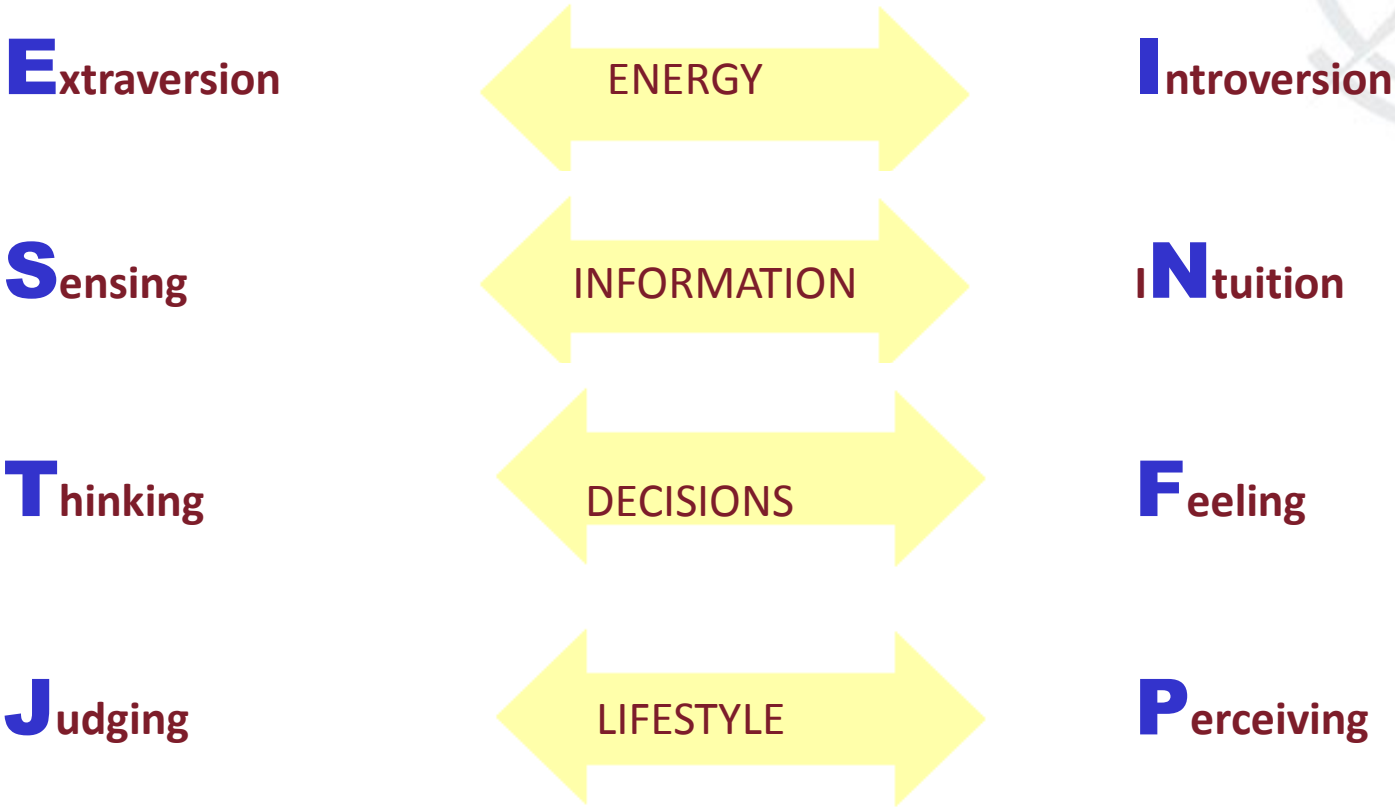
# MBTI Theory

- MBTI is based on Jung's theory
  - Two basic attitudes (life orientation)
    - Extraversion
    - Introversion
  - Two basic functions (mental processes)
    - Judging
    - Perceiving
- Katherine Briggs and Isabel Myers expanded it
  - Within Judging are the extremes Thinking and Feeling
  - Within Perceiving are Sensing and Intuition

# Preference Dichotomies

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# Energy

| EXTRAVERSION | INTROVERSION |
| --- | --- |
| Being energized through contact with other people or through engaging in activities<br><br>(the outer world) | Being energized through ideas, quiet times, or solitude<br><br>(the inner world) |

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# How Are You Energized?

## EXTRAVERSION

- External/exterior
- Outside thrust
- Talk thoughts out
- Breadth
- Involved with people, things
- Interaction
- Action
- Do-think-do

## INTROVERSION

- Internal/interior
- Inside pull
- Keep thoughts in
- Depth
- Work with ideas, thoughts
- Concentration
- Reflection
- Think-do-think

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# Extraversion-Introversion

# Polling Question

- Based on this description, would you describe yourself as an extravert or introvert?
  - Extravert
  - Introvert
  - Not sure

# Information

| SENSING | INTUITION |
| --- | --- |
| Paying attention to what you perceive through the five senses: seeing, hearing, touching, smelling, and tasting | Paying attention to what might be described as the sixth sense—the unseen world of meanings, inferences, hunches, insights, and connections |

# How Do You Take In Information?

## SENSING

- Present orientation
- What is real
- Practical
- Facts
- Perfecting established skills
- Utility
- Step-by-step
- The five senses

## INTUITION

- Future possibilities
- What could be
- Theoretical
- Inspirations
- Learning new skills
- Novelty
- Insight-by-insight
- The sixth sense, a hunch

# Sensing-Intuition

# Polling Question

- Based on this description, would you describe yourself as more sensing or intuiting?
  - Sensing
  - Intuiting
  - Not sure

# Decisions

| THINKING | FEELING |
| --- | --- |
| Making decisions based on impartial criteria—cause-effect reasoning, constant principles or truths, and logic | Making decisions based on values-based, person-centered criteria, seeking harmony |

# How Do You Make Decisions?

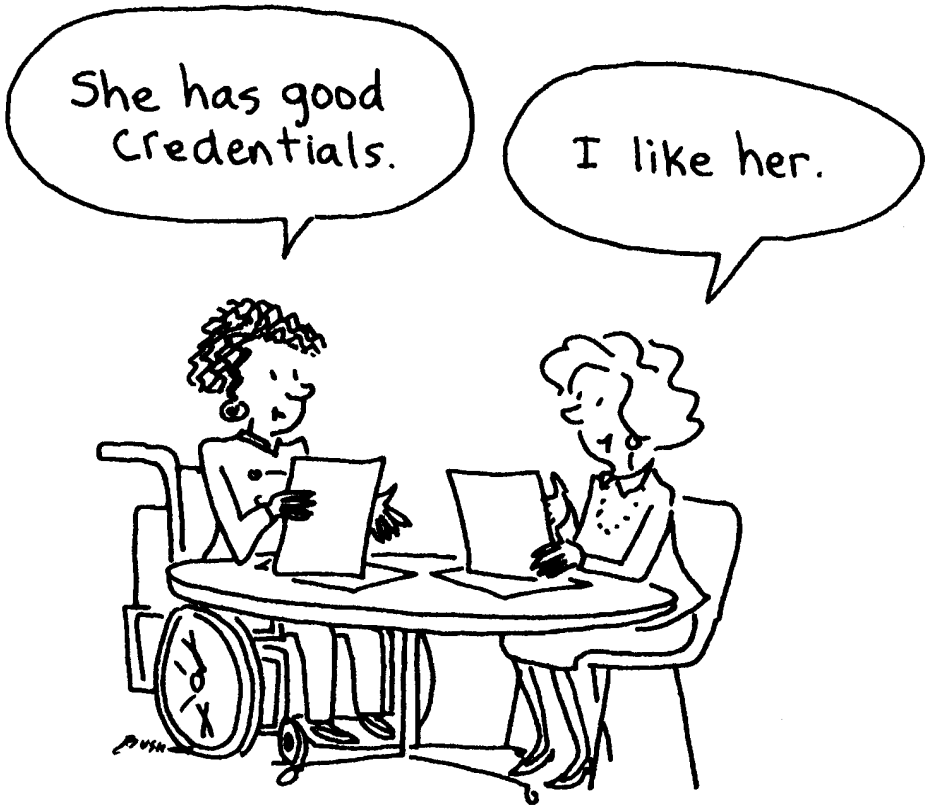
## THINKING

- Logical system
- Head
- Objective
- Justice
- Critique
- Principles
- Reason
- Firm but fair

## FEELING

- Values system
- Heart
- Subjective
- Mercy
- Compliment
- Harmony
- Empathy
- Compassionate

# Thinking-Feeling



# Polling Question

- Based on this description, which are you more of -- thinking or feeling?
  - Thinking
  - Feeling
  - Not sure

# Approach to Life

**JUDGING**

Want to live an ordered life, with goals and structure, making decisions so you can move on

**PERCEIVING**

Want to live a spontaneous life with flexibility, staying open to new information and possibilities

# How Do You Approach Life?

## JUDGING

- Decide about information
- Regulate
- Control
- Settled
- Run one's life
- Set goals
- Closing off
- Organized

## PERCEIVING

- Attend to, gather information
- Flow
- Adapt
- Tentative
- Let life happen
- Seek options
- Opening up
- Flexible

# Judging-Perceiving

# Polling Question

- Based on this information or your MBTI report, do you think (or feel) that you're more judging or perceiving?
  - Judging
  - Perceiving
  - Not sure

# Self-Awareness Is Key

- Understanding your personality type will give you insights so that you can:
  - Tell others what you learned – both good and bad
  - Realize your preferred style is not necessarily others
  - Explore how your personality type fits with those of your team
    - Begin to identify new communication styles, processes and ways to embrace all the personalities on your team

***Your team type is then made up of the most common preferences of your team members…***

# Possible CPA or IT Team Type Chart

| | | | |
|---|---|---|---|
| **ISTJ –**<br>**RJ, CK, MB** | **ISFJ –**<br>**DR** | **INFJ** | **INTJ –**<br>**RR** |
| **ISTP –**<br>**TL, MM** | **ISFP –**<br>**PD** | **INFP –**<br>**CB** | **INTP –** |
| **ESTP –**<br>**WR** | **ESFP –** | **ENFP –**<br>**MRoswell** | **ENTP –** |
| **ESTJ –**<br>**DR, JL, RR** | **ESFJ –**<br>**SL, Mradcliff, ND** | **ENFJ –**<br>**KR** | **ENTJ –**<br>**JW** |

# Sample
# Team Type - ESTJ

- The primary preferences include the Extraversion, Sensing, Thinking, Judging types
  - 9 Introvert and 10 Extravert
  - 14 Sensing and 5 INtuition
  - 11 Thinking and 8 Feeling
  - 13 Judging and 6 Perceiving

# Sample ESTJ Team

- Once you have assessed the personalities of your team members, you can then:
  - Identify the cultural implications of your dominant team types
  - Explore the impacts to the team or clients that you can see from these dominant characteristics
  - Take actions to maximize these strengths or minimize the weaknesses of your team type
  - Explore what works and what doesn't about your type working in this team culture
  - Identify what you could do to embrace all your team members' different styles

# Meyers Briggs Success Story

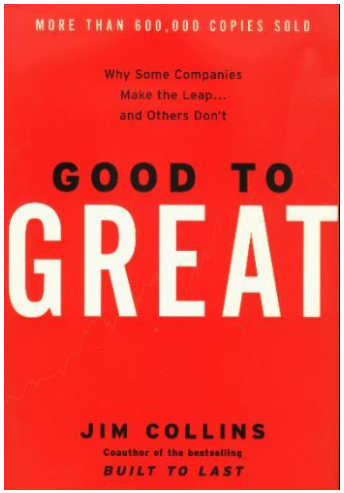
- 11 Partner 90 person accounting firm
- Completing the Myers-Briggs and holding a 1.5 day session on diversity in their team, they:
  - Enhanced their communication, with each other, between departments and among the partner team
    - Built empathy and understanding!
  - Identified new processes and improved – and in some cases tailored – current processes
  - Identified links to performance issues that weren't attributed to technical or motivation
  - Enhanced their mentoring and development of people

# Polling Question

- After hearing today's information, do you believe that assessments are worth exploring in your firm?
  - Yes
  - No
  - Maybe

# Q & A

- Please use the webinar service to ask questions of the panel.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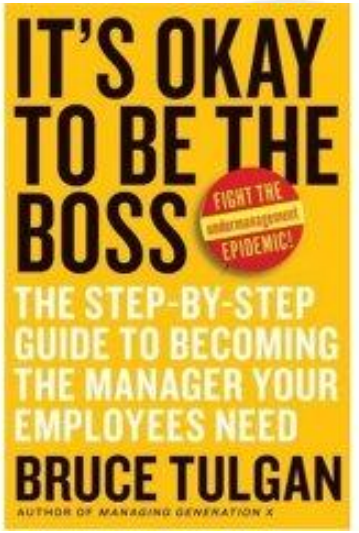
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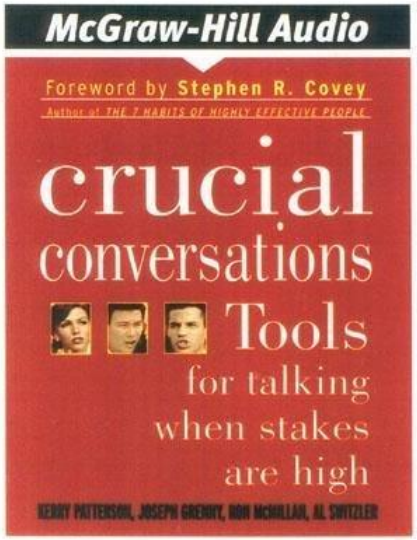
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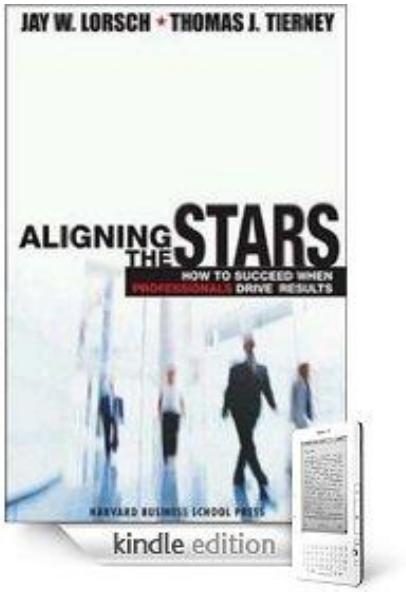
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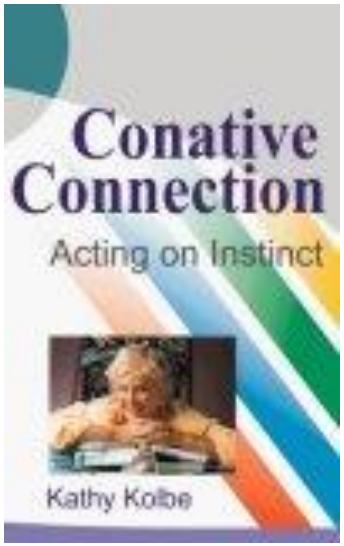
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Acting on Instinct
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# Thank You
# Please Connect with Us!

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