



# CASE STUDY

MINING THE FULL VALUE  
OF AN ASSESSMENT



Call Center Industry



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# ProfileXT®

## Mining the Full Value of an Assessment

### AT A GLANCE

The organization uses the PXT in hiring, employee development and succession management, which results in a common language for discussing talent.

### Company background

A privately held global leader in business-process outsourcing recently sought a partner to help with its hiring processes. The outsourcing company found Profiles International and cut costs significantly. The company is especially well-known for providing customer-care call centers and complementary back-office services, but it also provides customized solutions in the areas of sales, technical support, risk management and collections. Headquartered in the Southeastern United States, the outsourcing company operates more than 140 on-shore, near-shore and off-shore solutions facilities in 27 countries, including about 40 sites in the United States.

Essential to the organization's success is the ability to maintain a workforce able to meet the high expectations of a clientele that runs the gamut from financial institutions, to health care providers, to manufacturers, to government agencies, and beyond. The company, which has roughly 60,000 employees worldwide, invests a lot in its associates to ensure they have ample subject-matter expertise and superior people skills. The human resources department estimates that new hires go through several weeks of training. The bottom line: Excessive turnover can significantly increase the cost of doing business.

To help avoid that problem, the outsourcing company began a relationship with Profiles International. Today, all of the company's operations make use of the ProfileXT®, and to support that the vendor has helped to develop 400 to 500 ideal profiles for various positions across the enterprise. But a specific branch in the Southeastern United States stands out for its work to get the most possible value from the tool, exceeding expectations with results in not just pre-hire screening, but employee development and succession management<sup>2</sup>. This case study focuses on that particular site.

<sup>1</sup>The ProfileXT® (PXT) is a multi-purpose assessment often used in the pre-hire screening process. It helps companies to develop a profile of the ideal candidate for a position and compare profiles of actual employees and candidates against this profile.

<sup>2</sup>“Succession management” is a strategic and systemic process for creating successors at many levels of the organization, including non-managerial roles. Succession management refers to an organization's processes for identifying, selecting and managing successors, as well as the processes of career planning and talent migration.



### KEY TAKEAWAY

The involvement of senior management in the selection of an assessment provider reinforces the company's commitment to talent management and increases the speed of adoption of the assessment tools.

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## Path to Profiles International

Some years ago, it became clear to leaders at the organization that recruitment models typically used at other companies didn't quite suit its needs. The varied expertise that the company requires of its employees and its preference to consider each applicant for multiple positions are two examples of what makes this outsourcing company unusual.

Also, the organization had encountered cases in which applicants professed certain skill sets, and maybe even actually had skills in what seemed to be the right categories, but nonetheless ultimately proved a bad fit for their positions. So in 2003, the company opted to try looking at more than just competencies, broadening its pre-hire screenings to look at personality and behavioral traits.

Largely through the initiative of one particularly interested executive, the organization found Profiles International. Given the company's underwhelming previous experiences, decision-makers were understandably cautious. When they visited Profiles' headquarters in Waco, Texas, to learn more about what this latest vendor had to offer, they took a show-me mindset.

## Implementation from the top down

The corporate group who went to the three-day training in Waco included the human resources manager for one of the company's sites. The travelers not only studied Profiles' approach, they took assessments themselves. They finished the trip eager to introduce the ProfileXT® in the branch, though some had been skeptical at first.

As the HR manager recalled, “Quite frankly, when someone brings you a new software tool, the first thing you think is, ‘Oh, brother, another thing we’ve gotta learn ... and do we even have time to deal with this right now?’ But when I went to that training and saw the reasoning behind the tool and, of course, the science behind it along with some of the results of how it worked after we took the test ourselves – it really helped me to come back with more of a story behind it, not just, ‘Here’s what we’re doing.’ And I think that’s critical to implementation.”



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The organization has found Profiles International to be ready and able to look into any questions that have arisen along the way, as well as suggest ways to adjust tools or their usage to ensure concerns are addressed.

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### First-hand experience informed the process

Next, members of the human resources team and all senior staff took the assessment. That experience and the discussion that followed – regarding the accuracy of their scores, what was reflected about their personalities, and how they could use those insights in working together – were key steps.

Critical thinking about the accuracy of assessment tools is important for any company that’s looking at using one to guide decisions that will affect individuals’ livelihoods and the future of the enterprise. To be lax on that step in initial implementation or in the ongoing validation of the tools would be irresponsible. The organization found Profiles to be ready

### Identifying top performers

Ultimately, all employees would complete assessments, but next in line for the assessment were new hires and top performers. A composite ideal profile is developed against which job applicants can be measured. But how does a company identify its top performers for an initiative like this? The organization handled the question thoughtfully, aware that missteps here could threaten the success of everything to follow.

Senior leaders met monthly during this stage of implementation, which began with gathering statistics on employees and ranking them. Supervisors then invited top performers to be assessed, making the request an honor. The test itself was given on-site, where human resources staff could explain its purpose and address any concerns.

In deciding which top performers to feed into the composite profile, decision-makers ruled out those whose scores were seen as anomalies. They reasoned that those who had scored extraordinarily high on, for example, the learning index – a measure of how quickly a person learns – might skew the ideal, causing applicants with lower but ample aptitudes to appear less well-suited for a job.

### BEST PRACTICE

To serve the organization's need to assess candidates against more than one job, multiple reports are generated for each applicant against the profiles of all relevant positions.

## Using the ProfileXT®

The branch in the Southeastern United States uses ProfileXT® in three primary contexts: pre-hire screening, employee training and development, and succession planning.

### ► Pre-hire screening

The organization's business model and approach to hiring create some peculiar needs when it comes to creating and implementing assessment tools. For example, many companies judge job candidates in terms of their qualifications for only one job at a time. This company prefers to gauge each applicant's suitability for multiple positions at once, and then set the applicant on a path toward whichever position seems the best fit.

To serve that preference, multiple reports are generated from each applicant's assessment, measuring his or her results against the profile for all relevant open positions at a given location. Given the business model, the relevant open positions can be quite diverse. For example, clients include a bank, a health care provider and a credit-card company. And multiple lines of business within the site serve each client in different ways. The health care provider alone gets help with calls from health care practitioners, Medicare inquiries, and questions about billing and enrollment.



This means that greater numbers of ideal profiles are tapped regularly for the organization's operations than what's typical for other companies. At one site, the number is seven. Across the company, the number is 400 to 500.

When someone applies to work at a branch of the company, the application first gets a glance from someone in the human resources department. If the candidate meets minimum requirements, he or she is invited to the site to learn more about the company. Then, if the applicant is interested, comes the ProfileXT®.

PXT results are generated quickly enough for a hiring manager to discuss findings with the applicant during the same visit and specify which job is

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expected to be the best fit. The assessment is designed in such a way that the hiring manager can get a sense of whether the applicant’s answers to similar questions have been consistent. Inconsistency, or distortion, can suggest that an applicant has tried to tell the company what he or she thinks will help to land the job.

Before the next step, the interview, the hiring manager can refer back to the assessment results and use them to tailor an approach that pinpoints areas of distortion, as well as areas where the applicant’s profile deviates most from the ideal. Interviewers use standardized questions, but emphasis in an interview can vary for this purpose.

#### ► Learning and development

If a candidate is hired, he or she goes on to training, and ProfileXT® results are used again at this stage. Trainers receive copies of assessment results, as well as guides for interpreting them, and participate in what the outsourcing company calls “Friday-before” meetings in advance of each group training session.

The meetings are forums for discussing what the assessment has indicated about each applicant’s training needs and how they might affect a particular session. For example, awareness of a training group’s particular mix of learning styles might lead a trainer to adjust his technique. Low scores on the learning index might signal a need to bring in an additional trainer to provide extra help. Trainers have learned that extreme aptitude gaps in a group can make it hard to set a pace for learning that is appropriate for everyone.

Assessment results also are used after training sessions. For example, if conduct problems arise with a particular trainee – or any employee – company officials might examine assessment results for any indication of whether the problem stems from core behavioral or personality traits. If that is the case, it can be a red flag that problems are likely to continue throughout employment. If it’s not, the problems might be attributed to circumstances that will pass or an issue that can be addressed with coaching, which also can be guided by assessment results. If problems are traced to a characteristic on which an employee’s score deviated from the ideal profile, the situation can prompt an adjustment in how that characteristic is weighted in future hiring decisions or reinforce the importance of considering such deviations.

# CASE STUDY

## MINING THE FULL VALUE OF AN ASSESSMENT



### KEY TAKEAWAY

Companies use assessment tools to screen and assess candidates, uncover strengths and weaknesses, determine job fit and leadership potential, and identify specific development needs that drive success.

An HR representative said, “We’ve tried multiple times to make a liar out of the assessment. But time and time again it has shown that it is credible – extremely credible. And we’ve hoped that it wouldn’t be sometimes, when we’ve wanted to take a chance on hiring someone, but unfortunately it was right, and I wasn’t.”

#### ► Succession management

The outsourcing company found that ProfileXT® results can offer a great starting point for discussions of employees’ potential for promotion, and for identifying the development needs of high-potential employees who want to advance. Because the assessment is part of the hiring process, this discussion of possible career paths can begin very early in the employment

life cycle – as early as the initial job interview. And it can be revisited during performance reviews to keep motivation stoked and to guide goal-setting sessions between an employee and a supervisor.

Assessment results can also offer a tie-breaker when it’s time for tough choices regarding which employees to promote. For example, one branch’s human resources manager noted a recent situation in which two employees were considered strong candidates for a single higher-level opening. In terms of past performance and other criteria, the two were neck-and-neck. But a check of the employees’ assessment results revealed that one was a better fit for the position, and that’s the one who’s likely to get it.

Leaders at the organization appreciate the help assessments offer with what otherwise might be more subjective decision-making. While subjectivity can’t be eliminated entirely, a science-based tool can help to ensure that standards of the U.S. Equal Employment Opportunity Commission<sup>3</sup> are met, and that job candidates and employees are treated fairly.

Figure 1: Attrition Improvements at Site in Southeastern U.S.

	2008	2009
30-day goal	15%	10%
90-day goal	18%	13%

Source: Profiles International, 2010

## Results

The branch in the Southeastern United States reduced its 30- and 90-day attrition goals by 5% and still continue to meet these goals every month. The site’s first quarter 2010 attrition rates are on track for another successful year. These improvements are a direct result of the hard work and focused actions that this outsourcing company took to seek out, select and implement the right solution.

<sup>3</sup>The U.S. Equal Employment Opportunity Commission (EEOC) is responsible for enforcing federal laws that make it illegal to discriminate against a job applicant or an employee because of the person’s race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information. It is also illegal to discriminate against a person because the person complained about discrimination, filed a charge of discrimination, or participated in an employment discrimination investigation or lawsuit.