

WORK IGNITED PRESENTS

Using Assessments to Measure Bench Strength



Case Study

How a major health system utilized the
WorkPlace Big Five Profile and 360° Feedback
for
Succession and Targeted Development Planning

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Case Study: Building Bench Strength

The Situation

This 400+ bed hospital is one of the largest in its community. In addition to traditional hospital care, services include ambulatory surgery, lab, imaging, and private practice centers. The organization, established in 1904, traditionally attracted their workforce from the immediate community and the local nursing school. A favored place to work in the community, turnover was low and most managers “grew up in the organization”.

The organization celebrated its 100th anniversary and began to plan for its second century. This planning included a critical look at the organization’s talent. The Executive Team felt confident that they were capable of designing a vision for the future. But, they were quite uncertain about the ability of the Middle Management Team to execute the strategy, or to eventually be prepared to lead the hospital in the long-run. Their concerns included:

- The Middle Management Team’s inability to drive performance.
- Significant resistance to change, which would impede the ability to grow.
- A lack of critical thinking and problem solving among the Middle Management Team.

Most of their Middle Managers had been in their positions for many years. It would be difficult to make major changes, but they had to take action. They didn’t know where to begin.

The Project

Data is used to fuel decisions at every level of an organization. So, it makes sense to use data to make people decisions as well.

The WorkPlace Big Five Profile is one of the most valid and reliable assessments on the market today and widely used for recruiting, development, succession planning, and organizational analytics. It measures an individual’s personality on five different dimensions:

- Need for Stability: How one reacts in stressful situations.
- Extraversion: Energy for working with people and other stimulus.
- Originality: Desire to focus on strategy and change versus implementation and detail.
- Accommodation: How adaptable an individual is to others.
- Consolidation: The degree to which one focuses and pushes toward goals.

The WorkPlace Big Five Profile also has the potential to predict emotional intelligence, values, and the natural energy or potential for performing over fifty job competencies. It is therefore, an ideal tool for understanding leadership potential and succession planning, based on a structured competency framework.

Step One: Potential

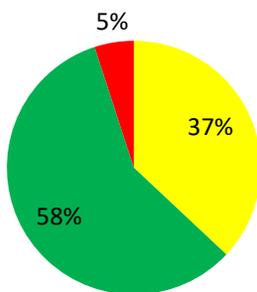
The first step was to understand the potential for the Middle Management team to successfully perform the competencies desired for leadership success in the hospital. Aggregate reporting from the WorkPlace Big Five Profile opened the Executive Team's eyes to some interesting information:

- People skills, such as teamwork, working with diverse populations, and coaching others were natural talents for the Middle Managers. Given their clinical backgrounds, the ability to serve and work with others was energizing for them.
- Task skills, such as managing performance and problem solving were more draining for the team. Change was difficult for them to accept, let alone drive.

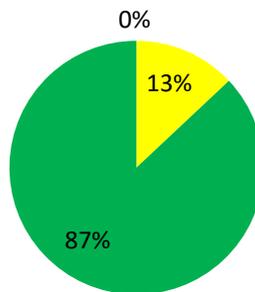
Selected Competencies

Green = Energizing/Natural for Team Yellow = Somewhat Natural Red = Draining for Team

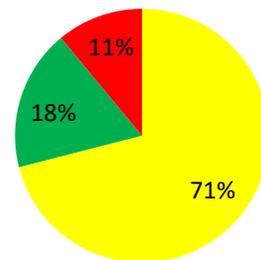
Teamwork & Cooperation



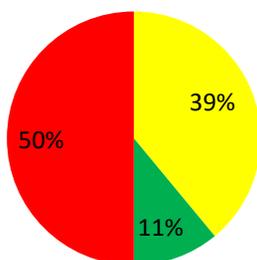
Comfort with Diversity



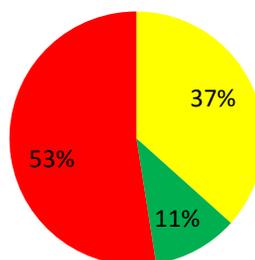
Coaching Others



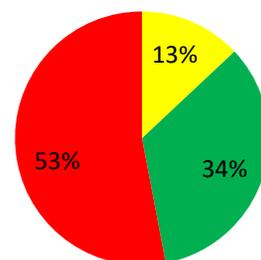
Performance Focus



Comfort with Change



Problem Solving



The results of the assessment revealed that many Middle Managers did not possess the natural talent to drive performance, change and problem solving. *Spending money on training programs in these areas will not have the desired impact.*

Step Two: Adding Performance

The WorkPlace Big Five Profile provides an objective measure of potential for any given trait or competency. However, it does not measure actual performance. So, the hospital utilized 360° feedback to understand perceptions of others. The 360 was customized to measure behaviors and skills associated with the desired leadership competencies.

Results from both the WorkPlace Big Five Profiles and Leadership 360’s were combined to illustrate potential and performance in a traditional nine-block matrix.

Performance/Potential Matrix

Performance An individual's ability to demonstrate the competencies as measured by 360° feedback.	Potential An individual's capacity for growth based on competencies and "fit" as measured by the WorkPlace Big Five Profile.		
	Low	Medium	High
	Effective Performer Has overcome significant competency gaps to exceed performance expectations.	Solid Performer Able to demonstrate most leadership competencies to exceed performance expectations.	Top Performer Naturally possesses desired leadership competencies and exceeds performance expectations. Has significant potential for growth.
	Stable Contributor Has significant competency gaps resulting in average performance. Could have limited potential for growth.	Emerging Contributor Capable of demonstrating leadership competencies but could be more successful in applying them to exceed expectations.	Natural Contributor Naturally possesses desired leadership competencies but could be more successful in applying them to exceed expectations.
High	Medium	Low	
Mismatch Has significant competency gaps which may be driving low performance. Most likely has limited potential for growth.	Questionable Capable of demonstrating many leadership competencies but may lack the ability to apply them to meet expectations.	Capable Naturally possesses desired leadership competencies but is not successfully applying them to meet expectations.	

Two matrices were created:

- The first matrix was designed to understand the Performance and Potential for the *Executive Team*.
- The second matrix was designed to understand the Performance and Potential for the *Middle Management Team*.

Both matrices are illustrated on the following page.

Executive Team

Performance An individual's ability to demonstrate the competencies as measured by 360° feedback.	Potential An individual's capacity for growth based on competencies and "fit" as measured by the WorkPlace Big Five Profile.		
	Low	Medium	High
	Effective Performer Chief Medical Officer	Solid Performer Chief Operating Officer Chief Quality Officer	Top Performer Chief Nursing Officer
	Stable Contributor	Emerging Contributor Chief People Officer	Natural Contributor Chief Executive Officer
Low	Medium	High	
Mismatch	Questionable	Capable Chief Mission Officer	

Middle Management Team

Performance An individual's ability to demonstrate the competencies as measured by 360° feedback.	Potential An individual's capacity for growth based on competencies and "fit" as measured by the WorkPlace Big Five Profile.		
	Low	Medium	High
	Effective Performer Director of Spiritual Care Nursing Director #4	Solid Performer	Top Performer Nursing Director #1
	Stable Contributor Nursing Director #5	Emerging Contributor Nursing Director #2 Director of Primary Care	Natural Contributor
Low	Medium	High	
Mismatch Director of Transport Director of Imaging Director of Housekeeping Director of Dietary Services Director of Admissions Director of Facilities	Questionable Foundation Director Director of Financial Services	Capable Nursing Director #3	

This analysis confirmed many things for the Executive Team including:

- Their own strong ability to be the primary drivers of the future strategy.
- The significant number of Mismatched Middle Managers explained the lack of bench strength and inability to execute the strategy.
- Nursing Director #1, who had posted and was rejected for two positions within the organization, could be at great risk.

Yet, many of these individuals, if terminated, would be difficult to replace. And, significant turnover among the Middle Management team would not be seen as favorable among the highly unionized, sensitive workforce.

In addition, the Executive Team recognized that conducting mass training would not provide the desired return on investment. So, they explored a variety of learning techniques:



Ultimately, the team designated specific learning interventions for each block on the nine-block matrix to create a very targeted development program. This would allow each individual to get the learning and growth opportunities that were right for them, at the right cost for the organization.

For example:

- *Top Performers* were given opportunities for job rotations and new experiences.
- *Capables* were given the training to build on their potential.
- *Effective Performers* were given one-on-one coaching to make sure that their high performance was not coming at significant personal expense.
- A variety of approaches were used with *Mismatches*.

Targeted Development Program

Performance An individual's ability to demonstrate the competencies as measured by 360° feedback.	Potential An individual's capacity for growth based on competencies and "fit" as measured by the WorkPlace Big Five Profile.		
	Low	Medium	High
	Effective Performer One-on-One Coaching	Solid Performer Industry Conferences Challenging Assignments	Top Performer Job Rotations Special Projects
	Stable Contributor Compensating Strategies	Emerging Contributor One-on-One Coaching Coaching from Managers	Natural Contributor Action Learning Coaching from Managers
Low	Medium	High	
Mismatch Job Reassignment Team Building Outsourcing Termination	Questionable Job Reassignment Termination	Capable E-Learning Traditional Training	

The Results

After a three-year focus on developing leaders, the hospital has achieved numerous awards and distinctions including:

- Top 100 Integrated Health System
- Community Value Index – 5 Star Hospital for Financial Stability, Cost Control and Quality Performance
- Top 100 Hospital for Intensive Care
- Positioned for the Changes Associated with Healthcare Reform

Most importantly, in a conversation with the Chief Operating Officer, he reported that patient satisfaction and employee satisfaction were at the highest they've ever been, and financial results were ahead of plan. When asked about the critical factors for this success, he replied, "We're being a lot nicer to our employees. We're giving them a chance to use their strengths on the job every day, while creating partnerships and innovative ways to compensate for individuals' short-comings."

This organization used data to drive their people decisions and ultimately, their organization's growth. It wasn't a difficult undertaking, simply one that required strategic solutions and simple tools to achieve their workforce goals.

More Information About the Workplace Big Five Profile

The Five-Factor Model of Personality is the most current, valid, and reliable personality assessment available today. Psychologists use it as the primary means of understanding and interpreting personality. During the 80's, the Five-Factor Model of Personality was tested extensively in academic and research communities world-wide and was found to be a superior model to earlier means of explaining and describing personality. The business community began to take the Big Five seriously when Pierce and Jane Mitchell Howard's article, *Buddy, Can You Paradigm?* was published in the September 1995 issue of *Training and Development Magazine*. Organizations that want to be up-to-date and remove biases from the workplace are using the Big Five as their model of choice since it offers so much depth and understanding for employees and leaders in all aspects of human resource development.

Primary Elements of the Workplace Big Five Profile

Need for Stability	Extraversion	Originality	Accommodation	Consolidation
Worry	Warmth	Imagination	Service to Others	Perfectionism
Intensity	Sociability	Complexity	Agreement	Organization
Optimism	Activity	Change	Humility	Drive
Rebound Time	Take Charge	Scope	Reserve	Concentration
	Trust			Methodicalness
	Tact			

Top Users of the Workplace Big Five Profile

Aetna Insurance	Catholic Health System	General Motors
Alcoa Aluminum	Center for Creative Leadership	Marcus Hotels & Theaters
Allstate Insurance	Coca Cola Bottling	Sovran Self Storage
Aramark Corporation	Federal Express	Swarovski Crystal Global
Atlantic Beach Police	Frito Lay	United Way
Bank of America	Horizon Behavioral Health	US Air Force
Brunswick Bowling		US Army

Costs

The full WorkPlace Big Five Profile includes the Trait Report, Narrator Report, and Capacitor Report which predicts natural energy for performing over 50 job competencies. The cost is \$400 per participant, including a one-hour debrief.

Get Certified Today

At Work Ignited, we know that your own human resources team is often looking for the right tools to make their jobs easier. That's why, we provide our 2 ½ day WorkPlace Big Five Certification Program to build your in-house expertise, while lowering the costs associated with administering reports. Certification is available at our site, at your site, or online. The cost per participant is just \$1,995. It practically pays for itself after just 8 assessments.

More Information About 360° Feedback

360° feedback can be complex, time consuming, and expensive. If done well, the return on investment can be significant. Individuals build their self-awareness through feedback and establish action plans to capitalize on their strengths and compensate for weaknesses. However, mistakes in the process can lead to a trail of destruction, distrust, and discontent. These mistakes are easy to make, but we can show you how to avoid them.

At Work Ignited, we'd be honored to fully facilitate your 360 process including design, administration, and debriefing participants in person or by phone. But, we also know that once we give you the knowledge and tools to do it yourself, you can do amazing things. That's why we provide do-it-yourself software and certification programs to build your in-house expertise.

Everything DiSC 363 for Leaders

Everything DiSC 363 for Leaders combines clear visuals and a conversational narrative to make the report easy to understand and use. With an exclusive selectable comments feature called CommentSmart, feedback providers can give focused, balanced, and constructive feedback. Leaders will learn about 8 approaches to effective leadership and get strategies for development in 3 areas based on their results. A coaching supplement makes debriefing a breeze.

WorkPlace Performance 360

The Workplace Performance 360 is the perfect solution if you're using competency models for your organization. The Workplace Performance 360, created by our research partners at the Center for Applied Cognitive Studies allows you to select specific competencies and collect feedback on their importance from both the participant and manager. Then, ratings can be gathered from a variety of feedback providers to measure performance in important areas. The report uncovers blind spots as well as hidden strengths, and results can be compared to norms of working adults globally.

20/20 Insight Gold

Our most robust solution is 20/20 Insight Gold, a fully customizable automated survey system. You can manage multiple surveys simultaneously, merge data from multiple projects, and conduct Time 1 Time 2 comparisons. Plus, the software comes with a library of over 1200 items and hundreds of performance improvement recommendations. You can even use 20/20 Insight for surveying customers, teams or your entire organization.

We're pleased to offer the best 360 tools on the market, allowing you to select a solution that meets the scope and budget of your project. If you're looking for strategic solutions for measuring performance, identifying targeted development needs, or succession planning, our 360 tools and behind the scenes support will allow you to achieve your goals.