

ASTD 2008 International Conference & Exposition

Session: SU 316

**Putting out the welcome mat:
new leader assimilation and coaching**

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Resources:
www.ipat.com/astd

Session Learning Objectives:

- analyze and evaluate new leader assimilation practices within your organization
- examine and analyze a job position within your organization from a personality perspective
- apply the concepts of person-job fit to your new leader assimilation processes



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Company leadership onboarding assessment

Position Title: _____

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1. This company values self-knowledge as a key factor for success	5	4	3	2	1
2. The job we are analyzing is usually filled with people who already know the job well and how to succeed in it	1	2	3	4	5
3. This job is generally the first supervisory job a person will have in his or her career	1	2	3	4	5
4. This company does a good job of showing leaders how we do things, not just what to do	5	4	3	2	1
5. This company has a strategy for establishing a development plan for leaders in this job starting on day one of their career	5	4	3	2	1

Sum of Scores 1 through 5: _____

Interpretation

20-25 High probability of on-boarding success

15-19 Average probability of on-boarding success

Under 15 Lower probability of on-boarding success

What to look for in an assessment provider questions for the practitioner to ask

If you've decided to augment your processes with psychological assessments, you should make a thorough evaluation of all possible providers. A few areas of inquiry are listed here.

Scientific expertise

<input type="checkbox"/>	Company History – Is the firm an assessment publisher? (Some firms that provide assessments are consultancies or software companies, and assessment expertise may be secondary). The better providers have a strategic market presence in the assessment publishing industry, have a strong reputation and are members of the Association of Test Publishers.
<input type="checkbox"/>	Technical Reports – Have they conducted applied research using the assessment and written summaries of their work for public consumption? Do they publish in peer reviewed journals or have their assessments been independently reviewed?
<input type="checkbox"/>	Professional Staff – how many Ph.D. measurement specialists are on staff? What professional associations do they belong to (e.g., American Psychological Association)?
<input type="checkbox"/>	The Right Tool – Is the right instrument and report(s) being offered? Confirm that the assessment instrument and its report are appropriate for your application.

Customer solution expertise

<input type="checkbox"/>	Customer Service Infrastructure – Are they able and willing to provide you with adequate support after the sale? This includes service and research professionals.
<input type="checkbox"/>	Customization – Can they customize the assessment to your need or will you be asked to use their assessment in its current form?
<input type="checkbox"/>	Implementation Assistance – Are they able to help you roll out the solution to your company? Do they offer training around the use of their product if needed or desired?
<input type="checkbox"/>	Research and Analysis Services – Can they help you to review your program and to provide insights that your management team can review to help examine program effectiveness or inform other initiatives?

Leadership competency worksheet

Position Title: _____

Key Responsibility	Key Competencies	Personality Factor
Example: Revenue Planning	Financial Acumen	Abstract Reasoning
	Critical Thinking	Intellectual Efficiency
	Planning Skills	Organization
Example: Managing People	Performance Coaching	Extraversion
	Career Development	Social Boldness
	Communication Skills	Warmth
	Implementation and Delegation	Influence

New leader onboarding/assimilation practices

You should view your talent management efforts as an ongoing process that incorporates strategies around pre-employment, onboarding, and development/coaching, among others. This worksheet can help you to consider some key milestones, and to examine current and possible future states and their place in the continuum.

Best Practice	Current State	Future State
Resume review		
Pre-employment Assessment		
Skills Assessment		
Behavioral Interview		
Offer		
Acclimation		
New Leader Program <ul style="list-style-type: none"> • Pre-test • Standards review • Compliance • People practices overview • Operational overview • Best practices overview • Simulation • Self-knowledge • Developmental Action Planning • Post-test 		
Follow up <ul style="list-style-type: none"> • Performance Support partner contacts new leader 		

Job Aid

tips for launching your new leader onboarding efforts with assessment tools

Analyzing your need

- Be sure you know why you want to use an assessment.** Your decision shouldn't be just about adding content to a workshop. You need to have a valid business reason for investing the time and resources into using this particular tool, and a plan to support this component. Personality assessments, for example, are excellent tools for individual self-awareness and team formation or teambuilding. Does this correspond to your need or goals?
- Make sure your choice fits into the business strategy.** If it doesn't, then ask yourself why you want to use it. For example, understand how individual self-awareness will contribute to on-the-job success. If it won't, re-think your strategy. How will information in the assessment reports be used within the organization, and what organizational benefit will be derived?
- Arriving at the Right Tool.** Examine more than one tool and be prepared to explain/defend your decision to use a particular tool. Key considerations would be the effectiveness of the instrument, ease of use, cost, ability to understand program impact, and support you will receive.
- Check Up On Your Provider.** Be prepared to conduct background research on other organizations that may be using the tool you choose, and check references. Call at least two or three references and ask them specific questions about why they use that tool and how they are using it and how long they have been using it. Let those who need to know that you have taken this step.
- Have a Strategy Around Your Data.** Be sure to understand how you will handle the sensitive information that your assessment tools and reports will provide. Will it be provided directly and solely to test-takers? Will management or coaches receive individual reports?

Selling your program

- Conduct a cost analysis and look at other resources and tools.** Make sure that the tool you choose fits and makes sense financially once you have the business facts in place. Create a list of options for application and cost.
- Make the Business Case.** Prepare an executive summary that is easy to understand so when you do your presentation it's easy for others to digest. Make it easier to understand the program value for those whose buy-in you need to gain. Anticipate their questions and concerns, including any legal questions or considerations around use of the particular instrument.
- Be prepared to present and sell your idea whenever you can.** Your initiative may still be rising up the priority list, so a full planning meeting may be difficult to come by. But have your pitch ready to present, whether in the hallway or the elevator, when you get your moment.
- Budget Friendliness** - Find a way to make the cost of the tool budget friendly, from its design to implementation to support. If you're entering into a contract, make sure it fits your budget, or if you have to space out the payments over time, negotiate that up front. Consider the short and long term costs of your decision, since workshop redesign can be costly. Consider insisting on "proof of concept" before making a longer term commitment to a solution.
- Be prepared to hear "Maybe".** Be prepared for this, and also be prepared to ask questions and provide clarifying information. That will you get to "Yes".
- Change Takes Time.** Allow those with the ultimate decision making power sufficient time to carefully think the decision over.