

What assessments do coaches use in their practice and why?

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This short research note commences with a review of the limited literature on psychometrics in coaching. It then presents results from survey of over 100 UK and international coaches, and thus extends the findings presented as a poster at the first European Coaching Conference in December 2008. We note that psychometrics are of benefit to coach, coachee and the coaching process and highlight avenues for future research.

Keywords: *coaching, type of assessment, development, psychometrics, user survey.*

PSYCHOMETRIC TESTING has a long history which can be traced back to the end of the 19th Century, 'James MacKeen Cattell is generally credited with coining the term mental test' (Vinchur, 2008, p.197). Early work concentrated on establishing reliability of tests, then focused on validity and in particular the association with various criteria. Initially tests tended to concentrate on ability and mental functioning, with personality testing taking hold in the 1950s. However, Guion and Gottier in 1965 published a much cited review that claimed personality tests were seriously flawed. Since then, the debate about whether or not testing is a good way of assessing people has persisted. With the advent of sophisticated meta-analytic techniques much support has been alleged for the criterion-related validity of tests (e.g. Hunter & Hunter, 1984; Hunter, 1986; Salgado, 1997). However, particularly for personality questionnaires, the validities have been criticised as being potentially inflated due to methodological flaws (Morgeson et al., 2007). These authors concluded that using self-report questionnaires in selection should be reconsidered. However given the focus of their article little consideration was given to the use of personality questionnaires in purely developmental context such as coaching, other than highlighting that personality measures should be developed with particular outcomes in mind.

In the UK, work has recently been undertaken at co-validating different types of personality questionnaires against work performance ratings (Saville et al., 2008). Overall, this presents validity coefficients that are higher than those criticised by Morgeson et al. (2007) and findings also indicate that short questionnaires do not necessarily have to incur losses in validity. It will be valuable for the psychological community to have these findings submitted to publications that are independently peer reviewed, and of course for other authors to follow suit and conduct their own co-validation studies.

Regardless of these conceptual and methodological debates, tests remain widely used in practice. In the UK, Chartered Institute of Personnel and Development data (CIPD, 2008) suggests that 41 per cent of organisations use general ability tests, 35 per cent use personality and aptitude questionnaires and 48 per cent use specific skills tests in a selection context, the aim being to assess and then select the best possible employees for a particular vacancy. However, no such usage data is currently available on the use of psychometrics for developmental purposes, such as coaching, mentoring or training. We do not know how many practitioners use psychometrics in this context; neither do we know for what purpose they do so. The current study aimed to fill this gap by under-

taking the first exploratory survey that investigated current use of psychometrics in coaching. We briefly review the limited literature on psychometrics in coaching, before presenting the results from our survey data.

Literature on psychometrics in coaching

Scoular and Campbell (2007) wrote that psychometrics can make two contributions to the coaching process. First, they can assist the coach to better understand the coachee. Secondly, they can be the 'most powerful take away' to coachees in terms of generating better self insight and awareness. The article went on to outline the key features of widely used tests such as Firo-B, Hogan Development Survey (HDS), Myers Briggs Type Inventory (MBTI) and Schein Career Anchors. This broad discussion of the tools is useful, but based on the author's own experience rather than evaluation data.

Bourne (2008) provided the first extensive chapter dedicated to psychometrics in coaching with helpful coverage of the basics in psychometrics (including a clear explanation of key terms such as personality and motivation), moving on to guidance on how to choose a good test, before providing a best practice feedback guide and an extensive case study.

Bourne (*ibid*) postulates that the most important decision when considering different types of psychometrics is whether or not the use of an instrument is likely to create unique insights for the client and help them move forward. We do not contend this point, but would argue that the feedback skills of the coach are just as important as the quality and choice of the instrument (see also McDowall, 2008, for a fuller discussion). The diagnostics available from the use of any instrument are a helpful starting point, but unlikely to generate insight by themselves unless they are bound into an entire process of setting goals, questioning, reflecting, and of course proactive input from the coachee. According to Bourne (2008) practicality is the second most important consideration in terms of how easily output can be accessed,

the cost of the instrument and so on. This is certainly a notion that merits exploration in future work, in terms of the extent to which coaches weigh up the generation of insight against the practicalities of choice. In other words does convenience take precedence in everyday practice?

Psychometrics in Coaching (edited by Passmore, 2008) is the first volume specifically targeted at an audience of coaches and coaching psychologists. It covers a whole range of psychometrics, providing a chapter each on various tools ranging from established 'Big Five' measures through to measures concerned with other concepts such as Emotional Intelligence (EI) and stress.

It is a strength of the book that each chapter discussed explicitly how respective instruments might be employed in coaching, as well as offering more general guidance on test choice and feedback. Allworth and Passmore (2008) highlight in the opening chapter that using psychometrics in coaching can take either of two basic approaches, these being: (a) to profile individuals (e.g. the assessment of skills and/ or preferences); and (b) a criterion-related approach where the focus is on the assessment against benchmarks such as job-related performance criteria and the notion of 'fit' (how a profile maps to a particular context).

There are, of course, other measures that find their use in coaching, including 'objective' or performance data (Smewing & McDowall, forthcoming). McDowall and Kurz (2008) discussed the use of 360 degree assessments, as discrepant feedback from different sources can act as a catalyst for behaviour change. EI has also been discussed further, as Maddocks (2009) suggested that creating emotionally intelligent organisations provides a framework for coaching by encouraging and fostering personal responsibility for actions. Nelson and Hogan (2009) wrote about 'coaching on the Dark Side', highlighting the need to assess potentially dysfunctional traits in order to formulate successful coaching interventions.

However, there is currently too little process-focused research that would provide insight into the mechanisms in coaching such as which coachees might respond best to a particular instrument, or indeed which coaches benefit from using which instruments. Mansi (2009) introduced promising research taking a mixed method approach and combining 360 degree feedback ratings and scores from the Hogan Development Survey (HDS). The research questions are why narcissists (broadly speaking those with an inflated sense of self) present for coaching and how coaches deal with these personalities. The eventual findings should be of interest to academics and practitioners alike.

Given that little data exists about the current use of psychometrics in coaching, we sought to investigate what tools coaches are currently using and for what purpose.

Methods

Survey strategy

It was our aim to survey UK coaches (including coaches practicing or visiting the UK who might otherwise be resident in other countries) widely. We therefore produced a pen-and-paper survey which was distributed at the 2007 Coaching Conference in London. The article authors hosted a stall advertising the research via a poster, and handed out a paper version of the survey to those expressing an interest. Participants completed these in their own time during the conference and returned the questionnaires to a collection box. There was also a web-based version which was advertised concurrently on two web-based discussion groups for coaches. Thus, we cannot determine an exact response rate.

Sample

Fifty per cent of respondents described themselves as a 'professional coach', with a further 23 per cent stating that they 'often coach people'. 17.6 per cent stated that they 'coach people occasionally'.

Results

We are reporting the findings below, presenting percentages and raw data to illustrate our findings.

Reasons for using assessments

Eight-eight per cent of all respondents said they used assessments, and most of those (60 per cent) said they used them with at least 70 per cent of their coachees. A relatively small percentage, 12 per cent of respondents, said that they did not use assessments at all. The main reasons given for this was that they did not feel that assessments 'added much value' (five per cent, they didn't 'fit in with my approach' (four per cent) or they weren't trained to use any (four per cent). One respondent wrote: *'I believe good coaching helps clients to understand themselves by their own reflective learning rather than being told via a test.'*

Of those who used assessments, the most popular reason was to 'open up areas for discussion' as seen in Table 1. The next reason, 'a useful source of data', also highlights the general contribution to the coaching context, as does the last reason of 'providing structure'. Furthermore coaches also valued very highly how useful assessments are to coachees, citing this as a stronger reason than their contribution to their own effectiveness.

One respondent explained: *'Because they (personality questionnaires) tend to be self-reports, they provide a useful insight and a focus for reflection around preferred styles.'*

Another said that she used them: *'...when the coachee has low self awareness. When teams are wanting to understand one another and appreciate differences When a team wants to drive in new leadership competencies, so to get feedback where they are with that now.'*

Some respondents said that they used assessments in response to client demands. One commented: *'In most cases, it has been asked for by the client and/or coachee. I do not otherwise suggest its use unless there is an unidentifiable block that really is a problem.'*

Another respondent said: *'Some clients who are very data driven want to have a tangible assessment profile tool as a back up to coaching. It*

Table 1: Reasons for using assessments and types of measures used in coaching.

Reasons for using assessments (N=90)		Type of measure used (N=90)	
They open up areas for discussion	96.3%	Personality measures	86.3%
They provide a useful source of data	79.3%	360 degree feedback	56.3%
They are useful to my coachees	73.2%	Learning styles	35.0%
They enable me to coach more effectively	48.8%	Emotional Intelligence	32.5%
They provide structure to coaching sessions	41.5%	Interest questionnaires	31.3%
		Performance data	26.3%
		Intelligence/aptitude tests	20.0%
		Competency measures	20.0%

also makes it easier to measure the ROI which is becoming increasingly important. Large corporations especially are increasingly asking for data that measures the effectiveness of coaching.'

Types of assessment used

Personality questionnaires were the most widely used assessment instruments, followed by multi rater (360) assessment/feedback, and Learning styles (see Figure 1 overleaf), which shows that use of psychometrics is very different in coaching, than it is in a more traditional assessment context.

With regard to specific measures used, the most popular was the MBTI (R), followed by Shultz' Firo B/Firo Elements, and Cattell's 16PF/16 PF5 as shown in Figure 1.

The main reasons why respondents chose particular assessment instrument were because they were '*...well researched and validated*' (74.4 per cent), the coach was '*...qualified to use them*' (66.7 per cent), they were '*...easy to use*' (50.0 per cent) and because of the '*...quality of reports produced*' (48.7 per cent)

Summary and discussion of findings

Our survey indicates that assessment instruments are widely used as part of coaching though they do not suit everybody. Some of our respondents did not see their added value or found that the use of these did not fill well with their approach; practical considerations such as insufficient training also play a role. Those who do use them say that they are a tool to structure and enhance the process itself. Assessments are seen as pro-

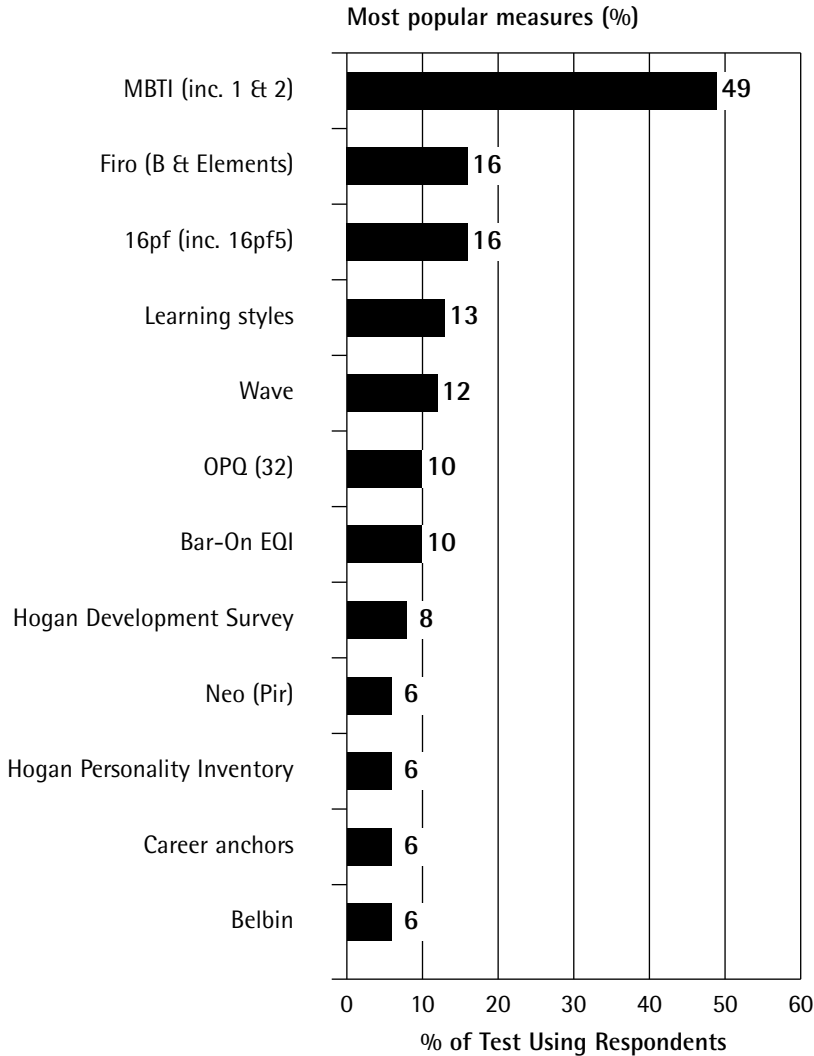
viding useful information to both the coach and the coachee, and are also sometimes used to provide data to the client. These findings indicate that coaches are perhaps more likely to use a profiling approach than to use a criterion-related approach as outlined earlier.

Whilst personality measures are the most popular, a wide range of different assessments are used with some coaches using different assessments in different circumstances. Whilst perhaps not unsurprisingly the most well known measures are the most widely used, newer measures such as the HDS or the Wave® model are also gaining in popularity. Again, the most popular measures were more suited to a profiling approach, as for instance the MBTI® which was explicitly been designed as a tool for individual career counselling and coaching. It is also interesting that measures such as learning styles and the career anchors are popular as these are easily accessed and require little training. This is in line with Bourne's (2008) observation that practicality is likely to have an impact on instrument choices.

Implications for future research

We are aware that our survey was limited to an initial exploration, rather than digging deeper into the motivations for using psychometrics. Future research could build on our tentative foundation to build a framework that investigates the value of assessments to the coach, to the coachee, and also to the client and the commissioning organi-

Figure 1: Most popular measures.



sation. It would be also be helpful to ascertain coaches' approach to coaching (including any training undergone) as well as potential individual differences, such as efficacy beliefs, as it is possible that some of us may require an 'assessment security blanket' more than others, therefore using assessments in different ways.

Finally, we call for more published and peer-reviewed case study research as a resource for coaches' and coaching psychologists' personal development. Whilst *Psycho-*

metrics in Coaching (2008) provides us with examples of how different instruments can be used, it is still necessary to build up an evidence base that links the use of psychometrics both to outcomes (focusing on a criterion-related approach) but also to process variables and the coaching alliance. We are also wondering whether there is scope for setting up an interest group around the use of assessments in coaching. Please get in touch with the first or second author if you are interested.

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