

Psychometric tests are now a multi-million-pound business: what lies behind a coach's decision to use them?

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Abstract

The use of psychometric tests has grown into a multi-million-pound industry. This paper describes a phenomenological study to investigate the reasons why coaches choose to use psychometric tests designed for personality assessment in their coaching. The aim of the study was to explore the decision-making process involved and whether accreditation is important. Data were collected from in-depth interviews with six experienced coaches who were accredited to use the Myers-Briggs Type Indicator and at least one other psychometric test. The findings suggest that a background of psychological knowledge is as important as the knowledge of the use of psychometric tests.

Key Words: Phenomenology; psychometric test; coaching; psychological knowledge.

Introduction

Companies spend millions of pounds a year on psychometric tests which measure personality types, learning styles and the personal preferences of their employees. McHenry (2003) states that the value of psychometric tests sold every year to UK organisations is more than £20 million, and that in 2003 they were used in most of the public sector and for selection in more than 70 of the FTSE 100 companies. According to Howard (2008), this figure now stands at 85% of the FTSE 100. In the United States, it is suggested that the value of sales of psychometric tests and inventories for recruitment, team and personal development is in excess of 100 million US dollars per year (Zemke 1992 p. 43). More than 3.5 million people around the world annually complete the Myers-Briggs Type Indicator personality inventory (MBTI), (Briggs Myers 2000 p. 5). A formula entitled the "utility equation", a financial measure of productivity, has been developed which can calculate how much the use of psychometric tests can be of value to organisations that use them (McHenry 2003.) One survey found that psychometric tests (including both aptitude and personality tests) were used in some manner by 60 per cent of the respondents (CIPD 2006). In the light of this, it might be useful to consider whether this has any significant impact on how coaches coach. If a coach is helpful to guide a client through the process of understanding their personality type or preferences as part of the coaching process, there could be grounds for suggesting that training courses for coaches should automatically include becoming accredited to use a particular psychometric test. If that were to be the case, it could be argued that coaches should always use them in their coaching. On the other hand, it could also be argued that it is not necessary to use psychometric tests at all, provided clients reach a successful coaching outcome.

This paper is an exploration of some of these questions. It examines why coaches use psychometric tests and in what circumstances. It seeks to understand the decision-making process, as well as the relevance of accreditation. Given the expenditure on psychometric tests by companies and individuals, and the fact that there are thought to be more than 5,000 psychological instruments in the English language (Simms 2007), it seems pertinent to develop a level of insight into what coaches feel they contribute to their own coaching process. The study was not concerned with the merits of any particular psychometric tests, only why coaches use them, and solely addressed those psychometric tests which measure personality in some way, rather than intelligence or ability. This paper will review the literature, explain the choice of methodology and provide the background of the participants in the study. This will be followed by a discussion of the findings and the conclusions.

Literature Review

In Ancient Greece, the word “psyche” encompassed the essence of an individual and their physical being, their life spirit and soul, their heart, their personhood, as well as their spirit after death (Morwood and Taylor 2002). Kline (2000 p. 1) says that the etymological definition of psychometrics is “measuring the soul” and explains that it can be understood as “the study of individual differences”. There is much literature on the development of the theories of personality, and the history of personality profiling, from the late 19th century onwards. One of the leading psychometric tests is the MBTI, which is based on Jung’s theory of personality. Jung rejected Freud’s view that trauma at a young age led to neurosis: for him these neuroses were more to do with archetypes, a synthesis of what had occurred, rather than Freud’s “reductive” (*author’s emphasis*) approach which concentrated on the initial event itself (Casement, in Wiley 1996 p. 85). Jung’s work on psychological types, published in 1921, particularly in relation to the attitudes of introversion and extraversion, has carried through to the present day (Nelson-Jones 2006 p. 53). Theories of personality were also being developed by trait theorists such as Gordon W Allport. Later, Hans Eysenck and Raymond Cattell developed their factor-analytic theories of personality traits, namely the Eysenck Personality Questionnaire (EPQ) and Cattell’s 16 Personality Factor Test (16PF). Kline (1993 p. 454) describes the EPQ as a “benchmark” personality test and considers that Cattell’s research into factor analysis methods is “superlative” (Kline 1993 p. 474). This area of the literature is important in establishing that psychometric tests did not develop simply in isolation. Rather, they evolved organically alongside the heightened interest in understanding and developing theories of personality at the end of the 19th century and the beginning of the 20th century. Given the differences of opinion of even the early theorists, it is perhaps unsurprising that there are now so many different varieties of psychometric tests which measure personality.

The literature reveals a considerable amount of evidence regarding the application of psychometric tests outside business settings. One example of their use is in the growing arena of offender profiling and forensic science and there are suggestions that in the future, interpretations of psychometric tests may shed light on clinical conditions and classification of types of offender (McCann, 1992); (Edens et al, 2001). However, this particular literature does not address the possibility of pigeon-holing individuals by virtue of perceived personality, or whether there should be limitations in the use of psychometric tests in these circumstances. In sport, psychometric tests that profile personality are widespread, but there are concerns that they do not all measure the same things and therefore lack uniformity and clarity about what they are measuring (Thomas, Murphy et al, 1999 p. 698).

There would appear to be many and varied reasons as to why psychometric tests are used in business settings. It may be directly linked to simple economics: to improve a company's competitive edge; increase profits, develop better HR strategies (Williams and Dobson 1997; Jenkins 2001). However, the administration of psychometric tests may not always achieve the desired result if they are incorrectly applied (McDonald and Edwards 2007). The National Grid Company introduced assessment centres into the organisation in 1990 in order to help facilitate new working practices following privatisation. Staff were asked to undergo psychometric tests, and feedback was to be provided by managers. The process proved to be deeply unpopular and costly, partly because the managers themselves needed feedback training (Winter 1995 pp. 15-19). There do not appear to be any statistics available to illustrate how much companies fund trainers in the use of psychometric tests, and whether these are internal staff, or internal or external coaches. Neither does the literature make clear whether companies usually expect coaches to administer psychometric tests and provide feedback as part of a coaching programme. If the administration of psychometric tests and the feedback can be done by trainers on behalf of the company, it might indicate little or no need for coaches.

Personality in the context of leadership is perhaps where a crossover exists in business between straightforward feedback and coaching. Any understanding of leadership must include an appreciation of personality and "leadership, personality, and personality assessment are necessarily related" according to Hogan and Hogan (2001 p. 40). Their longitudinal study of leaders used their own personality inventory which was designed to draw out potential shortcomings. They found that some of these could be masked by significant social skills and would not be apparent during a selection interview. This raises a possible concern that in the wrong hands, this could become something of a weapon to be held against an employee who is thought to be under-performing. Nevertheless, it seems that the application of psychometric tests in business is becoming common practice and is used extensively for selection and for enhancing leadership and team development.

There is significant literature on using psychometric tests in coaching. Much of it describes the positive impact that psychometric tests can have, for example: beginning a coaching conversation; understanding differences; a useful agent of change, even though they can be time-consuming and expensive (Hardingham et al, 2004; Rogers, 2004; Taylor, 2006). Melamed and Jackson (1995 p. 13) discuss the benefits of using psychometric tests in a holistic framework to empower individuals, not just in the workplace but in all aspects of their lives. There are also cautions about the use of psychometric tests. They can be intimidating and have the potential to damage client relationships (Zeus and Skiffington, 2000; Peltier 2001). However, in spite of the quantity of literature on this subject, there appears to be very little which fully addresses the coach's individual motivation or need to use psychometric tests.

Methodology and Data Collection

According to the philosopher Edmund Husserl, phenomenology seeks to understand how the foundation of knowledge of our view of objects and events arrives in consciousness (Spinelli 2005). Giorgi and Giorgi (2003, in Smith, 2003 p. 26) suggest that the application of psychological phenomenology in research is an attempt to throw light on how people exist in their worlds and their experiences and meanings. This study was seeking to understand the "lived experience" of coaches (Creswell 1998 p. 54) and a phenomenological enquiry was therefore chosen as the best fit.

The study was carried out with six respondents who were all coaches with many years of experience between them. They coached in one-to-one and team settings and were all independent, except for one coach who was employed by a large organisation in the public sector, but also worked privately on occasion. Their client-base ranged from large corporations and industries in the public sector, to individuals and small and medium-sized businesses and organisations in the private sector. In order to ensure parity of experience, they all had certified qualifications in the use of MBTI and at least one other model of psychometric testing or personality profiling. In fact they each had several accreditations and qualifications, including: FIRO-B; 16-PF; the Birkman Profile; the Thomas-Kilmann instrument; Margerison-McCann Team Management Profile; Honey and Mumford Learning Styles; the Enneagram; California Personality Inventory; Schein's Career Anchors; and Belbin Team Roles.

The interviews were carried out in a semi-structured format and the focus of the interview was to elicit the rationale of the coaches for using psychometric tests. The intention was to find out what was important when they were making the decision to introduce psychometric tests in their coaching. Various questions and prompts were used to help articulate their logic, values and attitudes in this process. The interviews were tape recorded and transcribed and each interview lasted between one-and-a-half to two hours. Data were analysed based on methods described by Devenish (2002); Giorgi (1985); Colaizzi (1978); Hycner (1985, 1999); Lindahl (1997), and Groenewald (2004). This process was repeated for each interview and enabled the identification of emergent themes. Follow-up questions enabled verification of the findings. Each respondent agreed to the use of anonymised quotes with pseudonyms.

Findings and Discussion

The data in this study revealed that the role of psychometric tests in coaching was different for the coachee, the company and the coach. Each of these roles is discussed in turn.

Theme 1: The Role of Psychometric Tests for the Coachee.

There were three aspects that appeared to be the most important to the respondents. These were: i) the coachee's self-awareness and self-development; ii) the beliefs of coaches in the consistency of coachee personality type as revealed by psychometric tests; iii) the risk of the coachee's behaviour being stereotyped.

The position of the respondents appears to be consistent with the coaching literature, that using psychometric tests in coaching can increase a coachee's self-awareness and self-development. The respondents seemed to feel that psychometric tests provided a common language and could develop an appreciation of different personalities in the workplace. Their use encouraged "*self-reflection*". They raised awareness, "*the greater somebody's aware, the greater choices they have*". They were "*good tools for people who have no self-awareness at all.*" There was concern, expressed by Neil, that some of the available psychometric tests focussed on weaknesses:

I think that's counterproductive, it's much better to declare your strengths, what you're good at, put your energy into that.

Only one study participant always used psychometric tests as part of her coaching process. The remaining respondents felt they should only be introduced if the coachee felt they would be of value, which supports some of the literature previously reviewed. Sometimes psychometric tests

made people feel uncomfortable, according to Meg, and a model which suited one person might not suit another:

It is very helpful to give a better understanding of themselves, but only if it's something they're going to accept as being valid, so it's about working out when, if ever, it's appropriate to use it.

It appeared that the respondents were not saying that a coachee's self-awareness could only be achieved if psychometric tests were used, but that they were a way of facilitating and perhaps providing a shortcut to the process. What was important for the respondents was that the coachee did become more self-aware, no matter how it happened.

The participants in this study had all been accredited to use several of the better-known psychometric tests and constancy of type is a central tenet for many of them. There were mixed views about the consistency of personality type on re-testing over time. Opinions varied from believing type did change: "when I do the test, I'm always different"; to thinking that it never changed: "we just have a predisposition or habitual point"; to feeling that it was bound to change as coachees developed a better sense of self-awareness and therefore a better sense of true type. For the respondents, the main point was that coachees would have the opportunity for self-development once they had gained knowledge of their personality type or profile through a psychometric test, even if it changed later on. It would seem that the variety of respondent opinions is also reflected in some of the literature (Howes and Carskadon (1979, in Pittenger 2005); Lewis 2002; Pervin et al, 2005).

The respondents seemed to be aware that stereotyping a coachee's behaviour after a psychometric test might be a potential problem. They had their own ways of dealing with it. These appeared to be based on their own experiences in coaching and their own knowledge through the accreditation and reading they had undertaken.

One study comparing the strengths and weaknesses of some psychometric tests suggests that it would be wrong for practitioners to have a "blind reliance" on such tools (Patel 2006 p. 195). In spite of their wide experience in the use of psychometric tests, it did not appear to be the case with these respondents. The implications in this study suggest that the use of psychometric tests for the coachee can increase self-awareness and self-development. There is a risk of stereotyping coachee behaviour through the use of psychometric tests but provided coaches are vigilant, there are ways to manage this effect. With regard to the mixed responses on the question of constancy of type, this might be an area for further examination. There appears to be a lack of completely independent research on consistency of type in the literature, or a full discussion on whether it actually matters if type changes, as long as there is some self-development in the coachee who has undergone a psychometric test.

Theme 2: The Role of Psychometric Tests for the Company

There were two aspects to this theme which appeared to be the most important in this study. They were: i) the financial implications for the company; ii) fulfilling company expectations.

The respondents were all aware of company budgets and that companies would want value for money. Their accreditation had all been either fully or partly-funded by the company they were working for at the time. Two of them were unsure if they would have self-funded at that time, although they had gone on to fund some of their own accreditation in other areas, as had the other

participants in this study. The literature has demonstrated a variety of reasons why companies might wish to use psychometric tests with particular regard to profitability. Bluckert (2006) considers that one of the core competencies of a coach should be an awareness of the business world, and an understanding of corporate dynamics and this seems to be the case for the participants in this study.

There was a sense among the respondents that the kind of psychometric tests which provided printed information was as important to the company as it was to the coachee. Joanna said she felt it meant that companies could see what they were getting:

There's a product in terms of the profile that comes out of it, it's accessible...it's part of a language that builds up within the organisation so it's very quickly knowable and understandable.

The use of psychometric tests could be a means of providing tangible evidence, “a glossy report”, that a staff development programme was in place, especially for senior people. But Meg was concerned that psychometric tests were not always carried out in a way that contributed to people’s understanding of themselves and their impact on others and were sometimes used as a treat:

They're used a bit like Smarties...oh you will do your this, and you will do your that, and actually they're not really done very well so you get a couple of hours of something with a little sheet of paper which tells you what you are, then you park it away.

This may appeal to organisations where the business climate is one of goal orientation and measurable activity (Peltier 2001). The experience of the respondents was that intensive coaching coupled with the use of psychometric tests was only being offered to leaders. It may be that organisational trends in companies are rapidly changing due to increasing economic factors, and therefore the process of selection and development of senior staff has to be part of their strategy to keep ahead (Kwiatkowski 2003). Two of the respondents thought that psychometric tests coupled with coaching might, on occasion, be offered as some kind of perk to senior leaders by companies who wanted to be seen to be providing this kind of personal development opportunity. One respondent described how some of the leaders she had coached had “boxfuls” of profiles. This view is consistent with the idea that coaching at a senior level may not always be necessary but is being provided as part of the executive package (Wasylyshyn 2003).

Theme 3: The Role of Psychometric Tests for the Coach

There were three aspects in using psychometric tests that were important to coaches. These were i) the coach’s psychological knowledge in relation to the use of psychometric tests: ii) the coach’s self-awareness, and iii) the impact on evaluation and supervision for the coach.

The data analysis with regard to the role of psychometric tests for the coach appeared to reveal strong opinions from all the respondents. This aspect of the data would seem to be the most important and has considerable implications for coaching. One of the respondents considered that even though her knowledge of specific psychometric tests was useful and helpful, it was more important to have an understanding of the process of business and “*psychological concepts for individuals and organisations*” and this was key to her coaching. Another respondent was of the opinion that qualifying in the use of some psychometric tests had in itself given him some

understanding of psychology, and he also had regular therapy which he believed enhanced his self-awareness when he coached.

Karen did not think anyone should coach without some psychological insight:

The thing about psychology, you need to know enough to know not to go there, don't you. How would you even know what the boundaries are unless you had some knowledge about psychology, you wouldn't even be getting alarm bells going?

Psychological knowledge was as important as using psychometric tests and should be incorporated into coach training as far as Neil was concerned:

You're providing a very personal service so it's very important to understand the intricacies of personality...you're affecting people's thinking, dealing with behaviour."

There is much literature to support this view (Buckley, 2007; Spence et al, 2006; Berglas, 2002). The British Psychological Society guidelines on the use of psychological tests (by which term they include psychometric tests) state that people who use psychological tests should not "offer services that lie outside their competence" (BPS 2007 p. 15). In a survey of coaches, who had an average of 14 years of experience between them, it was found that some of them had decided to seek further training in either psychotherapy or counselling, in order to widen their knowledge of human development (Zagier Roberts and Jarrett 2006, in Brunning 2006 p. 29). While it is important to be able to distinguish between psychotherapy and coaching, this, and other knowledge from the so-called "caring professions" can all contribute to the coach's expertise (Downey 2003 p. 204). The potential impact this extra training might bring to bear is demonstrated by Wasylyshyn (2003) in her survey of her own coaching clients. She found that the top credential in choosing a coach was graduate-level training in psychology (82 per cent), followed by experience or understanding of business at 78 per cent. Coaching methods, which included psychometric tests, achieved just 35 per cent. Respondents had more than one choice of answers in each case. In a further paper, she suggests that psychology and the use of psychometric tests can bring deep behavioural insights into a coaching relationship (Wasylyshyn 2005).

The finding that using psychometric tests had increased self-awareness is not surprising. It stands to reason that a coaching tool designed to develop self-awareness and self-development for the coachee, will also enable the coach to develop. What seems to have been important to the respondents in this study is also the manner in which they were able to use this self-awareness to improve their coaching skills. Two of the respondents talked about how it had helped them to understand their own "*strengths and weaknesses*." It gave one of the participants in this study a better understanding of how his personal style would affect the way he coached, and the impact this could have on clients. A continuing process of self-awareness was essential to Rob's own working methods:

Without self-knowledge AND self-management then your agenda, concerns and personality will be muddying the water for the coachee.

The relevance of self-knowledge was "*huge*" for one respondent. Another described this process of self-awareness as part of a journey of maturation which enabled her to be a better coach. One participant in this study explained that using psychometric tests had contributed to her self-awareness, but so had her career and life experience. This combination of learning is comparable

with a study of experienced nurses who were found to be constantly building their knowledge on a complex assimilation of the “thinking, feeling and acting” elements of their profession (Daley 1997, in Daley 1998 p. 2). The significance of coach self-awareness is becoming more widely recognised in coaching (Zeus and Skiffington, 2002; Goleman, 1995). Whitmore (1992) claims that for coaches, self-awareness is an assimilation of many perceptions, including an understanding of psychology. It seems reasonable to suggest that for the respondents in this study, their accrued learning through psychological knowledge, use of psychometric tests, and experience, have all contributed to their self-awareness.

For the respondents, the question of evaluation and supervision appeared also to be important. However, they did not all agree that their accreditation in the use of psychometric tests should form part of an evaluation process. Two of the participants wondered how accreditation alone, would prove that psychometric tests were being administered correctly:

“a couple of day courses and get a certificate – what does that tell you?” (Neil)

“the piece of paper is neither here nor there, it’s how you use it that counts” (Joanna)

In Nancy’s experience, companies were using evidence of accreditation much more in their decision-making process when they were considering hiring a coach, although there was still a place for traditional methods:

People will always before hiring you, phone somebody and say...what’s she like really... so I think there’s always this kind of formal accreditation and there’s the word of mouth and the reputation as well.

The views of the respondents about evaluation seemed to centre more on how their skills might be perceived, rather than how their coaching might be measured by clients. However, coaching skills themselves are not often measured with reliable methods (Lidbetter 2003). The International Coach Federation guidelines (2007) ensure that its members commit to professional conduct, but there is no guarantee of good conduct by coaches who do not belong to it, or other coaching affiliations. All of the participants in this study seemed to think that supervision should be encouraged: *“it’s safety for the contracting of the client and for the coach”*. Nonetheless, only one was being formally supervised and one took part in an informal peer-to-peer supervision arrangement. There was a sense that supervision would encourage good practice, by providing an opportunity to discuss individual coaching methods and thereby provide a forum for reviewing the use of tools and techniques, including psychometric tests.

Conclusion

This study set out to understand what lies behind the coach’s decision to use psychometric tests. It was an attempt to get some sense of the respondents’ experience of using psychometric tests in their coaching. The phenomenological approach to the research provided rich data. The finding that the use of psychometric tests can raise awareness for both coach and coachee was not unexpected, and was consistent with the literature. With regard to the findings in relation to the role of psychometric tests for the company, the views of the respondents seemed to be straightforward. They had an appreciation of company finances and it appeared, in their experience, that psychometric tests were only being offered to senior staff, either as part of their

career development, or sometimes as a perk of the job. The findings concerning the belief in the consistency of personality type as revealed by psychometric tests, were consistent with the literature in that there were mixed opinions about whether type could or would change over time. Although there has been considerable research over many years into the validity and reliability of psychometric tests, there do not appear to be any studies about coaches' experience of consistency of type. This would be a useful and informative addition to the literature.

As already stated in this paper, the findings concerning the coach's psychological knowledge in relation to the use of psychometric tests would appear to be the most significant. Bluckert (2006 p. 92) suggests that "psychological mindedness" should be a standard proficiency in executive coaching. The respondents interviewed all had either an academic background or training in psychology, or had acquired knowledge through self-teaching and experience. It would seem that for all the respondents, the psychological knowledge involved in the use of psychometric tests is as important as the knowledge of the tests themselves. They do not appear to feel that being able to use psychometric tests in their coaching is enough on its own. In the literature, there is considerable support for psychological learning of some kind. The difficulty is in how that learning can be guaranteed. The participants in this study all trained in the use of psychometric tests and part of that training included some psychological knowledge at a superficial level. However, on its own, that cannot be a guarantee of psychological knowledge. The respondents' psychological training or accrued career learning about psychology could be relied on as part of their coaching process, even if they were not aware of it. Linley (2006 p. 2) describes how coaching has moved into a new generation, "based on explicit psychological principles and grounded in a solid evidence base, something that is only just beginning." Given the increasing demands for a more rigorous evaluation of the coaching profession, including accreditation and supervision, it may no longer be enough simply to rely on accumulated psychological knowledge. In spite of the limitations of the study, there are implications in respect of those coaches who use psychometric tests and who do not have psychological knowledge.

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