

Coaching and Psychometrics: Comfortable Companions?

At a recent seminar in Aberdeen organised by the Scottish Association for Coaching an audience of 60 people participated in what was expected to be a relatively controversial session. The author, who was the presenter on that occasion, had been briefed to expect considerable resistance and even some hostility to the use of psychometrics in the coaching relationship. In the event, there proved to be very substantial interest in how psychometrics can be incorporated into the coaching relationship in such a way that it adds to, rather than subtracts from, the transparency of the process and the self-evaluation and insight achieved by the client.

Prior to the event attendees were offered the opportunity (without charge) to complete an online questionnaire before the session (Assessor from Selby & Mills Ltd), and to receive a personal narrative report at the event. The report was computer generated. This appeared to have the effect of giving people at the session more to say about psychometrics, rather than provoking some kind of confrontation. This outcome may have occurred for a number of reasons.

One is that when people think about psychometric assessment in the abstract (psychometrics is the measurement of behaviour after all), people frequently make assumptions which are more associated with the evaluation of ability than the description of personality and temperament. These assumptions are about topics such as the level of accuracy (correct or incorrect) associated with the candidate's responses. The assumption is frequently that there is a right way to respond and all others are wrong. By giving participants in Aberdeen the opportunity to complete a questionnaire and receive a report, they could understand that such an assumption was unjustified.

Secondly, there is an assumption that the candidate is somehow being tested, which results in a pass/fail outcome, when they complete a psychometric questionnaire, since ability and intelligence measures are also psychometric measures and do indeed have right/wrong responses. This is not the situation at all with personality and temperament assessment, where a picture of the candidate's preferences for behaviour and relationships is presented for the candidate to evaluate. The Aberdeen session provided reports which people could see were clearly descriptive rather than judgemental.

Thirdly, many people believe that psychometric assessment produces a measurement which is fixed and cannot change.¹ In other words people are pigeonholed by the assessment process. Nothing could be further from the truth. If personality and temperament questionnaires are used skilfully and appropriately in the coaching situation, they provide an accurate and sometimes enduring 'snapshot', but do not present a limitation. The ways that an individual's behaviour may change according to circumstances and context was discussed in the reports provided in Aberdeen.

Tools for the Coaching Toolkit

The result of the completion of a psychometric questionnaire is always a profile, whether or not this is accompanied by simple and readable narrative text. The profile presents a 'picture', expressed in some numerical and some text-based terms, which is simply a summary of the candidate's responses. This is frequently but not always also the result of a comparison between the summary of the candidate's responses and some other reference group, which is frequently called a norm group. This referencing process is utilised when psychometrics are being used in a decision-making context such as staff selection at work. That is not the case in the coaching relationship and it's a serious error to assume the two situations are similar.

It is perfectly feasible, following completion of a psychometric questionnaire, to produce a readable and transparent narrative report, without jargon or numbers, which the candidate can evaluate and then discuss with the coach. This can add dimensions to the conversation which may be achieved by conventional coaching, but which may take far longer to achieve than with the use of psychometric tools. The areas of

assessment covered by conventional psychometrics include preferred lifestyle, relationship style, motivations, emotionality, teamwork styles and interests.

I can hear some readers in some cases objecting that this insight can be achieved through coaching. I wouldn't dispute this. However, there are candidates for whom time is of the essence and those who would like a shortcut where it is viably available and psychometrics can offer a very succinct method for achieving this. There are different methods for completion of the questionnaire. These range from paper and pencil completion in exam-type conditions (not recommended) through to online completion where the client completes the assessment in the privacy of their own home or office at some convenient and comfortable time (highly recommended). The benefits of the latter approach are that the questionnaire completion occurs about one-third faster than on paper, the candidate answers more candidly and, finally, the process is rather more pleasant. It does not involve any time on the Coaches part. Several publishers provide this facility and a list of these publishers can be obtained from the British Psychological Society website at www.bps.org.

The training requirements to use individual questionnaires vary substantially. The key decision for anyone considering using a psychometric questionnaire in the coaching context is to decide whether they want to invest in the use of one particular questionnaire or learn generically about the use of questionnaires and be able to use a range. Whilst the latter is intrinsically more attractive than the rather limited approach suggested by the former, in practice people use one or a couple of questionnaires for many years and rarely switch between them. The most widely used questionnaires, so far as the author can determine, are the following:

- Myers-Briggs Type Indicator (Oxford Psychologists Press)
- Assessor (Selby & Mills Ltd)
- 16 PF (Oxford Psychologists Press)
- OPQ (SHL Group Ltd)

All these questionnaires are available for online completion and details of the publishers can be obtained from the BPS website. The training for each of these individual questionnaires is typically between three and five days, depending on previous experience and qualifications.

The alternative method of training is to train within the framework recognised by the British Psychological Society to achieve what is called Level A and/or B Certification. Level A is the first full level of test registration and relates to ability and interest questionnaires. (These will be of little relevance to Coaching). This typically involves five days in the classroom or a mix of distance learning and classroom-based activity and must be completed before Level B, which is personality level training, may be undertaken. For this reason alone the author would not recommend this approach for people working in the coaching context. Spending some £2,500 and upwards of a week plus fieldwork in order to gain access to a personality tool which can be accessed for less than half that on its own seems a highly questionable undertaking. Full information is once again available from the BPS website about Level A and B Certification.

The Coach-Client Relationship: Will it Cope with Psychometrics?

There is debate about whether it is appropriate for the coach to undertake psychometric assessment with the client. In other words, if assessment is used, should a specialist third party undertake it with the client? It seems to the author that this query or controversy is based upon an old-fashioned approach to the use of psychometrics and one which does not routinely include the provision of a transparent and readable text-based report to the client, prior to the de-brief discussion. If the coach agrees with the client that they will complete an online questionnaire and then, before they meet to discuss the outcome of that completion, the client receives a readable narrative report, it's obvious that the client will come to the discussion with a lot to say. By doing it in this way it overcomes the traditional barrier between assessor and assessee, which is that the assessor has all the information and therefore all the power in the relationship. ⁱⁱ

By the provision of a narrative report the reverse can be achieved; the power and motivation to understand and to take action is in the hands of the client and the coaching dynamic is radically changed. However, some of the test publishers do not encourage this, perhaps partly because it undermines the status distance between the assessor and the assessee. In the writer's eyes this is a positive outcome and the situation where the client comes to the conversation with a great deal to say is highly desirable. In addition, it also puts the assessor (coach) in the position of being able to discuss the narrative report which the client has received, with them, rather than putting them in the position of expert feeding back the results to the client. This is also much more consistent with the coaching relationship. However, if the reader's motivation for being coach is to be expert and in control (with all the power), then please read no further! Therefore, the writer can see little reason why a third person should be necessary to do the debrief following the assessment. .

Do Psychometrics 'Pigeonhole' the Client?

Not if the coach is working effectively and with a thorough understanding of the tools they are using. The idea of pigeonholing suggests a 'once and for all' identity which is bestowed by the output from the psychometric questionnaire. In the writer's experience this is a completely erroneous assumption. It's perfectly reasonable for someone to have a strong preference for a particular lifestyle. This does not mean that this is the only lifestyle within which they may be comfortable nor that they may not choose a different lifestyle at various times and in various contexts. For example, someone who is extremely private and self-contained may be 'life and soul' of the party when it's their party. Therefore the use of questionnaires needs to be carefully balanced with an understanding of the extent to which people flex and change according to different stimuli and in different situations. The effective use of psychometrics does not result in pigeonholing; it does result in the identification of preferences in order to help someone make judgments about the lifestyle and relationships they currently seek.

What does Psychometric Validity and Reliability really Mean? ⁱⁱⁱ

Strictly speaking, validity means 'Does the tool do what it says it does? Does it measure what it says it measures?' Reliability can be interpreted as 'Is the questionnaire repeatable over time? Are the items appropriate and is it the minimum necessary length?' All the tools which will be offered through the publishers listed by the BPS will probably be technically valid and reliable for use with a general population. You should check this before use. In the coaching context the normally rigorous rules of reliability and validity may be a little relaxed whilst still being relevant, because no decision will be made, except by the client, using that information. In addition, no decision should be made based solely upon that information. The questionnaire should produce a text-based report which can be understood by the client and used in conversation with the coach. You won't need to use a questionnaire many times, following training, before you will develop an understanding about whether it adds value to the normal coaching outcome. The technical properties of the questionnaire are extremely important in order to make the questionnaire user-friendly, transparent and reliable from the client's point of view. The most effective way to evaluate this in the coaching context is to identify the value which the client derives from their use.

The Client Relationship and Psychometrics

Psychometrics are only a tool to clarify, simplify and sometimes short-cut the coaching relationship as well as increase its effectiveness. In order for this to happen the coach must be able to review the results of the psychometric assessment and to move on from it to look at the 'so what do I do with this information?' phase. In order to do that it's useful to have a plan. For example, once the text of the report has been reviewed with the client it might be appropriate to say 'let's draw up a quick table on a piece of paper of what are the strengths and weaknesses or the priorities that you displayed in your responses, which we might want to take into account when looking at future actions?'. The piece of paper is divided into two columns, one for 'Priorities' and one for 'Unimportant' and the client then lists the things arising from the assessment report and discussion which are relevant under those two headings. These items then go into the

'Action' pot for consideration. An important point is that it's not always necessary to talk about the theory underpinning the questionnaire. Very often, in the case of Psychological Type questionnaires, such as the Occupational Type Profile or Myers-Briggs Type Indicator, the coach finds themselves explaining Jung's theory of Psychological Type. In the writer's opinion this is a frequent mistake, because it's offering scales and jargon which are alien to the client and not particularly relevant. However you need to work this out for yourself.

The use of psychometrics can provide you with your own private 'consultant' in the form of the report. This can be reviewed by the coach and the client critically and you may choose to ignore some bits and discuss further or act upon others. In this way psychometrics can help the client to turn walls into windows in order to enhance their understanding of themselves and their motivations, through using their responses to the questionnaire to benefit themselves. It often reduces the power relationship (or status distance) between the coach and the client and evens things up in a beneficial way so that the two people are working together to clarify and develop areas of benefit and further exploration for the client. Using competency reports can also help to clarify career, non-work activity and lifestyle direction.

While the use of psychometrics in the coaching relationship will not suit every coach's style, or be appropriate for every client, it is unwise to pigeon-hole psychometric tools on the basis of a passing acquaintance, coupled with conventional assumptions. The latest generation of online tools, which provide highly personal and non-prescriptive reports, are designed to offer significant benefits to the coaching relationship.

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ⁱ Shelley.D. and Cohen.D. (1986). *Testing Psychological tests*, p.31-46, p.106-122. London & Sydney: Croom Helm.

ⁱⁱ Toscano.J. (2006). The case for coaching. *Selection and Development Review*. 22(2), April, p.12-13.

ⁱⁱⁱ Kline.P. (2000) *A Psychometrics Primer*, P.23-45. London: Free Association Books.
Kline.P. (2000). *Handbook of Psychological Testing*, p.7-31. London: Routledge.