Assessments and Tools in Coaching
by Brian Nichol and Lou Raye Nichol

Business coaches draw on many assessment instruments and training tools in their work with clients. It's important that a coach becomes familiar with a number of these assessments and tools, as well as understands their function and how they are administered.

We've listed some popular assessments in this section. Most of these assessments are based on personality psychological theory, and many are backed by research and normative databases. Usually, but not always, the distributers require training and certification before a coach can use the assessment. Coaches also pay a fee each time they use the instrument. Information about the availability of these assessments can be readily found on the Internet.

Assessments

Workplace Big Five
The WorkPlace Big Five is a personality assessment based on the Five-Factor Model of Personality, the current standard for psychologists. WorkPlace is written specifically for business applications such as team building, leadership development, performance coaching and job selection. (www.centacs.com)

DISC Personality Assessment
DISC is an acronym of the four personality traits on which the assessment is based:
Dominance – relating to control, power and assertiveness
Influence – relating to social situations and communication
Steadiness – relating to patience, persistence, and thoughtfulness
Conscientiousness (or cautiousness) – relating to leadership development, improving interpersonal communications and team development.
(www.discprofile.com)

Myers Briggs Type Indicator (MBTI)
The Myers-Briggs Type Indicator (MBTI) assessment is a psychometric questionnaire designed to measure psychological preferences in how people perceive the world and make decisions. It is used for personal development, career coaching, team building, communication training and management development. (www.myersbriggs.org)

Hogan Personality Assessment
The Hogan Personality Inventory (HPI) is a measure of normal personality and is used to predict job performance. It is used for career development, job selection and training and development. (www.hoganassessments.com)

Birkman Personality Assessment
The Birkman Method® consists of a 298-question personality assessment that facilitates team building, leadership development, career counseling and interpersonal conflict resolution. (www.birkman.com)

FIRO-B
FIRO is an acronym for the full title Fundamental Interpersonal Relations Orientation. The author theorizes that our relationships are affected by three primary factors, our need for affection, control and inclusion. In organizations, FIRO-B is used to assess how an individual's personal needs impact his behavior toward other people. It is used for management development, team building and personal development. (www.cpp.com/products/firo-b)

Campbell Interest and Skill Survey
The Campbell Interest Survey is used to assess vocational interests and skills for career guidance in relation to specific occupational areas. It is used for career development, to guide individuals to appropriate academic courses and to assist displaced or laid off employees. However, this instrument may be more effective with young people at the start of their careers than those in mid-career. (www.pearsonassessments.com/ciss.aspx)

Now Discover Your Strengths
A book of self-assessments by Marcus Buckingham and Donald Clifton. The questionnaire assesses 23 strengths based on Gallup research compiled from individual employee surveys in thousands of organizations. It is used for career coaching, team development and management development. (www.strengthsfinder.com)

360 Feedback Process
A process which collects feedback on the work performance of an individual from his peers, direct reports, supervisors and sometimes customers - a 360-degree sweep of the individual's organizational environment. It is used for personal and professional development. Although the process has been developed and elaborated on by many assessment providers, it remains possible for the individual coach to design his own version that is customized to their client's requirements.

Lominger International (www.lominger.com) and the Center for Creative Leadership (www.ccl.org) are two organizations that provide 360 programs that are standards in the industry. A more recently developed model is the Tilt 360 Leadership Predictor - a strengths-based character assessment that measures the core character strengths of leadership presence and impact in the four pillars of their model: wisdom, humanity, courage, and resilience.
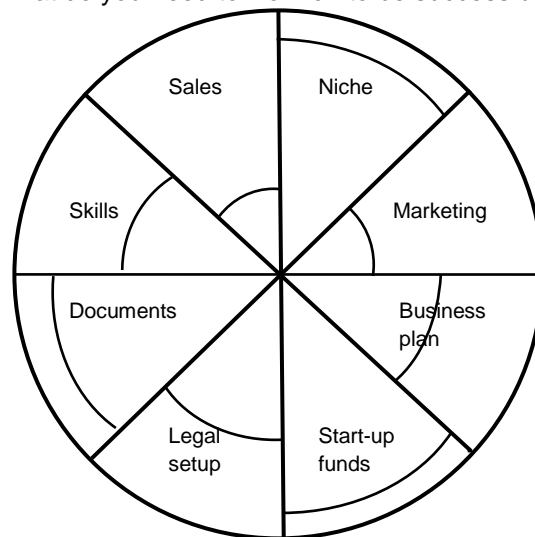
Self-Assessment Training Tools and Exercises

The assessments discussed above provide feedback or information to the client about his or her personality, potential interests, strengths or areas for development. They are derived from comparison with normative bases or from others' perceptions. This can be valuable information, but sometimes it can be difficult for the client to know quite how to use it. Some coaches use assessments such as DISC or MBTI to help them relate to the client more effectively; however this can increase the risk of stereotyping the client and should therefore be used with sensitivity.

Other assessments or exercises draw out information from the client for exploration in coaching. For example, a simple tool many coaches use is *The Wheel*. This is a flexible device that can be adapted to a range of client issues - work/life balance, developmental needs assessment, values/career alignment and strategic planning to name a few. In the example below, we have used developmental needs of a new coach as the focus of the wheel. The client draws an arc in each segment - near the center for weakness and closer to the perimeter for strength in the element represented. Then the question becomes "If this were a unicycle, how bumpy is the ride?"

The Wheel

How prepared are you in the following areas for getting
started on a coaching business?

What do you need to work on to be successful?

Coaches can draw on thousands of exercises that have been developed for a range of leadership and management training over the past fifty years. There was a time when management trainers were happy for others to use the exercises they had developed. More recently, people discovered the value of intellectual property, and now many such exercises are copyright material. The series *The Annual Handbook for Group Facilitators* by John Jones and William Pfeiffer is an

excellent source for training and development exercises, all of which are freely available for use by coaches.

Also included in this appendix are two tools developed by the Business Coach Institute and colleagues:

The Skill Preference Matrix

The Skills Preference Matrix enables a client to identify his current skills as well as skills he needs to develop.

The Competencies of a Manager

This is a flexible tool listing competencies that should be tailored to a specific management role. The questionnaire can be used by supervisors to help them articulate the performance development objectives for an employee. The questionnaire can also be used as the basis of a 360-degree feedback exercise.

Skill Preference Matrix

Instructions

Format and print the Work Skills listed on the next page on 80-to-a-page sheet of return address labels. Clients then choose relevant skills (labels) and stick them in the appropriate box of the matrix below. Alternatively, they can cut and paste the skills using a word processing program on their computer. Change the list of skills to suit client needs.

Do Well and Like	**Want to Develop and Like**
Do Well and Don't Like	**Don't Do Well and Don't Like**
Need to Develop and Don't Like	

Work Skills
Review the following skills and in relation to your own abilities and place each skill in the appropriate box of the Skills Preference Matrix.

Accounting
Assess politics
Administer
Analyze

Brief
Budget
Build alliances

Calculate
Classify
Close a deal
Coach
Compile
Compose
Compute

Communicate
Conceptualize
Construct
Coordinate
Consult
Counsel
Create

Develop people
Demonstrate
Design
Develop ideas
Develop projects
Diagnose

Edit
Establish policy
Establish procedures
Establish systems
Evaluate people
Evaluate projects
Facilitate Implement

Initiate action

Innovate
Invent
Inspire

Lead
Learn
Lecture

Make decisions
Make things
Manage things
Manage people
Manipulate numbers
Market
Motivate

Negotiate

Organize

Predict
Persuade
Plan
Present
Program
Publish

Question

Research
Resolve conflicts
Represent others
Review

Schedule
Sell
Serve others
Solve problems
Strategize
Structure

Supervise
Synthesize
Systematize

Teach
Test
Train
Troubleshoot

Use physical skills

Visualize
Verbalize
Work with others

Write

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Competencies of a Manager

The Manager Competencies form is a flexible tool for assessing the competencies of a manager. The competencies should be tailored to the specific management role you are working with. The questionnaire can be used by supervisors to help them articulate the performance development objectives for manager. It can also be used as the basis of a 360-degree feedback exercise.

The competencies specified in this example were developed for a particular manager's role and do not necessarily apply to other managerial roles although many are generic.

Competence	Level of Expertise			
	None	**Basic**	**Intermediate**	**Advanced**
Understanding the Business: knowing how the functions of a business work (marketing, operations, finance, accounts, HR and R&D)				
Understanding the Industry: public policy, critical issues, economic and social systems which impact the business.				
Specialist Professional Knowledge: Specify:				
Supervisory Skills: Leading groups Interviewing Planning Problem solving Decision making Time management Other skills:				
Staff Development Understanding: job analysis, recruiting, selection and training and development.				
Coaching Skills: helping individuals recognize and understand personal needs, values, strengths and weaknesses, alternatives and goals.				
Delegation Skill: assigning task responsibilities and authority to others.				
Feedback Skill: communicating information, opinions, observations and conclusions so that they are understood and can be acted upon.				
Group Process Skill: influencing groups so that tasks, group relationships and individual needs are addressed.				

Competence	Level of Expertise			
	None	**Basic**	**Intermediate**	**Advanced**
Intellectual Versatility: recognizing, exploring and using a broad range of ideas and practices; thinking logically and creatively without undue influence from personal biases.				
Cost Benefit Analysis: assessing alternatives in terms of their financial, psychological and strategic advantages and disadvantages				
Organization Behavior Understanding: seeing organizations as dynamic, political, economic and social systems which have multiple goals; using this larger perspective for understanding and influencing events and change.				
Presentation Skills: presenting information orally so that intended purposes are achieved.				
Writing Skills: preparing memos, letters and reports that follow generally accepted rules of style and form, is appropriate for the audience and accomplishes its intended purpose.				
Self-Knowledge: knowing one's personal values, needs, interests, style and competencies and their effects on others.				
Relationship Building Skill: establishing relationships and networks across a broad range of people and groups				