

# **LOMINGER ASSESSMENT INSTRUMENTS:**

**An Overview of Research Background and Support**



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# **LOMINGER ASSESSMENT INSTRUMENTS:**

## **An Overview of Research Background and Support**

Lominger has a large number of leadership and organizational assessment instruments that have been developed over the past 15 years. These assessments come in the form of paper-and-pencil questionnaires, on-line or electronic surveys, and sort cards. These psychological instruments measure such varied constructs as learning agility, team effectiveness, strategic effectiveness, and employee engagement. All these instruments were developed based on empirical data and the experience base of Robert W. Eichinger, Michael M. Lombardo, David Ulrich, and others. It is important that one understands that the scientific literature supports the psychometric integrity and usefulness of the instruments.

The objective of this report is threefold: (a) to briefly describe the instrument, (b) to highlight its factor and dimension structure, and (c) to overview its research support. The following nine instruments will be reviewed:

1. CHOICES ARCHITECT®
2. LEARNING FROM EXPERIENCE™ (LFE) Interview Guide
3. ENGAGEMENT ARCHITECT®
4. INTERVIEW ARCHITECT® (IA)
5. PERFORMANCE MANAGEMENT ARCHITECT® (PMA)
6. STRATEGIC EFFECTIVENESS ARCHITECT™ (SEA)
7. SUCCESSION ARCHITECT®
8. TEAM ARCHITECT®
9. VOICES® 360° Feedback System

In addition, we provide the research support for the “Big 8” competencies (see pp. 30–32).

# **CHOICES ARCHITECT<sup>®</sup>** **and** **LEARNING FROM EXPERIENCE<sup>™</sup> Interview Guide**

The CHOICES ARCHITECT<sup>®</sup> and LEARNING FROM EXPERIENCE<sup>™</sup> (LFE) Interview Guide are research-based tools designed to measure “learning agility.” Learning agility has been found to be a significant predictor of promotion potential and is incorporated into Lominger’s SUCCESSION ARCHITECT<sup>®</sup> methodology. The CHOICES ARCHITECT<sup>®</sup> assesses learning agility via sort cards, paper surveys, and e-surveys. The LEARNING FROM EXPERIENCE<sup>™</sup> Interview Guide is used to detect learning agility during the personal interviewing process.

## **The Case for Learning Agility**

Successful leaders develop on the job (McCall, Lombardo, & Morrison, 1988). They learn managerial lessons from day-in and day-out work experiences. On the other hand, many executives derail. They depend too much on the competencies that moved them into management in the first place and tend to stop learning the skills that are needed to continue to perform effectively as a manager (McCall & Lombardo, 1983). A relatively new concept called “learning agility” is increasingly recognized as essential for long-term success. The concept derives from a variety of studies conducted at the Center for Creative Leadership. Robert Sternberg and his colleagues at Yale (Sternberg, Wagner, Williams, & Harvath, 1995) and Daniel Goleman’s (1995) work with emotional intelligence also is focused on this concept. Learning agility is the ability to learn something in situation *A* and apply it in situation *B*. It is about forming patterns collected in one context and then using those patterns in a completely new or different context to make sense out of something you’ve never seen or done before. Research indicates that learning how to deal effectively with first-time or changing situations is more predictive of long-term potential than raw intelligence.

The evidence is compelling for building managers across time. Goldsmith and Reiter (2007) and Hall (1995) postulate that it is imperative for people to learn new skills as they climb up the career ladder. Successful executives learn from experience; they respond to adversity and diversity by learning new skills and additional ways of thinking (Lombardo & Eichinger, 1989).

## Lominger's CHOICES ARCHITECT®

The CHOICES ARCHITECT® consists of 81 items or behaviors that measure the following four areas of learning agility: (a) Mental Agility, (b) People Agility, (c) Change Agility, and (d) Results Agility. These four factors were derived from empirical studies (see Lombardo & Eichinger, 2000). When completing the 360° assessment, raters are asked to rate the targeted person on a 5-point scale, ranging from Not at All Like This Person (1) to One of the Clearest Examples of This I've Ever Seen (5).

The CHOICES ARCHITECT® can be used to:

1. Create candidate slates for key job openings and more significant promotions.
2. Determine who would most likely succeed in a newly created and untested position.
3. Upgrade performance after promotion.
4. Determine developmental needs of high potentials.
5. Match people to opportunities that will help them developmentally.

The following are some research findings on the reliability, validity, and generalizability of the CHOICES ARCHITECT®:

- The eCHOICES® Survey has high reliability. According to Lombardo and Eichinger (2000), the internal consistency for the four factors of Mental Agility, People Agility, Change Agility, and Results Agility are .93, .95, .96, and .96, respectively. An independent study conducted by Connolly and Viswesvaran (2002) also reported high internal consistency. Lombardo and Eichinger (2000) observed a test-retest correlation of over .81 for *each* of the four factors.
- An individual's overall learning agility (and scores on *each* of the four factors) was found to be significantly related to being classified as a high potential and staying out of trouble (Lombardo & Eichinger, 2000).
- Learning agility was significantly correlated with supervisory ratings of job promotability and overall job performance. Further, learning agility provided incremental validity over cognitive ability and the Big Five personality traits in predicting the above two criteria (Connolly & Viswesvaran, 2002).
- A field study conducted in a Fortune 100 food company reported that learning agility predicted their multiple performance measures (Church & Desrosiers, 2006).
- Another study validated the high potential assessment process in a Fortune 500 special materials company (Capretta Raymond, 2006).
- Research has also revealed that learning agility (as measured by the eCHOICES® Survey) is *not* correlated with IQ test scores. And it is *not*

- correlated to the Big Five personality traits, except for the trait “openness to experience” (Connolly & Viswesvaran, 2002).
- With regard to age differences, younger people tend to score slightly higher than older people on the Change Agility factor. However, the difference is small and does not appear to have any practical meaning (Lombardo & Eichinger, 2000).
  - Females tend to score slightly higher than males on the People Agility factor. Again, the difference is small and does not appear to have any practical meaning (Lombardo & Eichinger, 2000).
  - It also has been found that the CHOICES ARCHITECT® functions equally well in different cultures. The means of the four factors of agility were reported to be about the same across cultures. Moreover, it was observed that people around the world generally scored higher on Results Agility than on People Agility (Capretta Raymond, 2006).

## **Lominger’s LEARNING FROM EXPERIENCE™ (LFE) Interview Guide**

Most interviewers look for functional or technical skills, job experience, smarts or IQ, and clones—a “like me/us” mentality. However, research has shown that factors which cause hiring problems rarely pertain to a lack of functional, technical, or business skills, or a lack of basic intelligence. Rather, problems are typically related to conflict-resolution and problem-resolution skills and a lack of learning agility. The LFE Interview Guide helps you improve your ability to identify people who have the potential to perform well now, as well as in the future, under new and changing conditions. In Lominger’s view, learning agility is an early indicator of high potential. LFE is a structured, behavior-based interview that assesses learning agility. Using the LFE Interview Guide, interviewers assess four dimensions of learning agility: (a) Mental Agility, (b) People Agility, (c) Change Agility, and (d) Results Agility. As mentioned before, these four factors were derived from empirical studies (Lombardo & Eichinger, 2000) and are valid predictors of job performance and long-term promotability (Connolly & Viswesvaran, 2002; Lombardo & Eichinger, 2000). Raters are asked to rate the targeted person on a 5-point scale, ranging from Little/No Evidence (1) to Superior (5).

Features of LFE include:

1. It's a structured, behavior-based interview.
2. On the bottom of each interview page is an evaluation section with positive and negative themes to look for.
3. The LFE interview is probably more fair to those individuals with limited backgrounds in the sense of tenure and diversity of experiences.
4. LFE asks specific questions around common things that almost everyone has experienced.

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# ENGAGEMENT ARCHITECT®

## Why Do We Need Engaged Employees?

Traditionally, there was a psychological contract between employers and employees. An unwritten rule existed in which the employer would grant employees job security for life, and in return, employees would promise to be loyal and work hard (Rousseau, 1995). Much has changed during the past two decades of globalization, mergers, acquisitions, and downsizings. This implicit agreement has been breached. One study found that Harvard MBAs, on average, change companies three to four times during their first 10 years out of school (Reichheld, 2001). In this new era of the boundaryless career (Arthur & Rousseau, 1996), employees do not pursue employment loyalty and stability anymore. Rather, they look for companies that provide career growth, job challenge, professional development, work flexibility, and employability (e.g., Lockwood, 2007; Ulrich, Eichinger, Kulas, & De Meuse, 2007). Hence, *employee engagement* becomes a key ingredient in the new psychological contract between employers and employees. However, gaining employee engagement can be extremely arduous under the new psychological contract and the new world of global business.

Nowadays, employee engagement is frequently measured in organizations, but many organizations define and measure it differently. Organizations typically assess only the “roots” of engagement which can be traced back to the constructs of job satisfaction, group morale, organizational commitment, job involvement, and organizational citizenship behavior (e.g., Downey, 2007). While there is similarity among these concepts (e.g., all refer to positive emotional attachment to work and the organization), these variables differ conceptually and have different practical implications for organizations. An important difference is that employee engagement stresses discretionary behavior, going beyond what is normally required for a given job. This type of discretionary effort needs to be aligned with organizational strategy and purpose to create a competitive advantage for organizations. Organizational culture, agility, function, form, and employees should be aligned with organizational strategy and goals in order to be successful (Eichinger, Ruyle, & Ulrich, 2007).

Engaging employees is critical in today’s work environment. Unfortunately, research suggests that more than 70% of the workforce at most companies is not fully engaged on the job (Towers Perrin, 2003). It has been estimated that organizations can expect to increase performance by up to 20% and obtain an 87% reduction in employees’ probability of departure by increasing employees’ engagement levels (Corporate Leadership Council, 2004). In addition, organizations that are able to engage their employees deliver better business performance and returns to shareholders. Hewitt Associates (2004) found that

employee engagement at double-digit growth companies exceeds average employee engagement at single-digit growth companies by over 20%.

## **What Is the ENGAGEMENT ARCHITECT®?**

Research suggests that there are 11 fundamental causes (we can refer to them as "drivers") of employee engagement. Engagement Drivers refer to factors in organizations that influence the extent employees are engaged. Lominger's ENGAGEMENT ARCHITECT® has 55 items measuring the following 11 Engagement Drivers:

1. Strategic Alignment
2. Trust in Senior Leadership
3. Career Support
4. Developmental Opportunities
5. Immediate Manager Working Relationship
6. Peer Culture
7. Personal Influence
8. Employee Recognition
9. Pay Fairness
10. Nature of the Job
11. Nature of My Career

In addition, the survey contains five items which measure employee engagement itself. Lominger defines employee engagement as a heightened connection employees have with their jobs, career paths, and organizations that (in turn) leads to value-added work behaviors which significantly contribute to the goals of the organization.

The ENGAGEMENT ARCHITECT® is psychometrically sound. An extensive literature review has been performed. Two pilot studies were conducted using a sample of 695 employees from 10 different companies to identify the engagement factors and items. The scales are reliable. Our pilot tests also provide initial validity evidence. The 11 engagement driving factors as measured in this questionnaire predict job attitude, turnover, and employee engagement. On the other hand, the factors are unrelated to age, gender, and education.

Engaging *all* employees is important. However, engaging high potentials is even more important. During the past several years, a growing number of executives have become concerned about their organization's ability to retain the best and brightest employees (Schippers, 2007). Such "high potentials" and "high performers" count most, and their loss costs most. Organizations have limited resources. To maximize ROI, companies should prioritize service offerings so that the most time and resources are spent on the most value-adding parts. Research suggests "HiPos" may have a different view of engagement. For

example, HiPos appear to want to be challenged more than others. They seem to possess a quicker trigger to quit the company if they are not fully engaged. Consequently, embedded in the ENGAGEMENT ARCHITECT® survey are 19 items which assess four unique factors that drive engagement for high potential employees. These dimensions (referred to as “HiPo Drivers”) include:

1. Palpable Talent Management
2. Trust and Respect in Top Management
3. Personal Impact
4. Positive People Treatment

Thus, this survey can be used for the general employee population *and* exclusively to measure the engagement of a company’s high potentials. Preliminary results suggest that high potentials must be at least one standard deviation above the mean of other employees in the organization or risk losing them.

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# INTERVIEW ARCHITECT®

The INTERVIEW ARCHITECT® is a Human Resource (HR) tool designed to assist employers and HR professionals with the interviewing process. It enables interviewers to assess internal and external candidates more consistently and accurately. Three key features of the INTERVIEW ARCHITECT® are described below.

## **It Is a Highly Structured, Behavior-Based Interview**

While many interviewers will attest to their strong ability to “read” others and to be a good judge of character in an interview, their intuition does not necessarily serve them well when it comes to making hiring decisions. In fact, research has shown that the probability of making a successful hiring decision when following a typical set of informal, casual interview practices is roughly equivalent to making the decision by flipping a coin (Hunter & Hunter, 1984). There is a plethora of research supporting the notion that structured interviews accurately predict job performance (e.g., Huffcutt & Arthur, 1994; Schmidt & Rader, 1999). According to a report released by the Merit Systems Protection Board (MSPB) of the federal government, agencies are advised to use structured interviews to assess candidates for federal jobs, because structured interviews are twice as effective as unstructured interviews in predicting job performance (“MSPB calls for,” 2003). Two of the most important benefits of using structured interviews include: (a) better hiring decisions, and (b) less adverse impact. For example, McDaniel, Whetzel, Schmidt, and Maurer (1994) studied the criterion validity of interviews by conducting a meta-analysis. Using job performance as a criterion, they found a corrected criterion validity coefficient of 0.44 for structured interviews and a corrected criterion validity coefficient of 0.33 for unstructured interviews. In another meta-analysis, Huffcutt and Roth (1998) found that both Black and Hispanic applicants received interview ratings that on average were about one quarter of a standard deviation lower than those for White applicants. Structured interviews had a lower adverse impact than unstructured interviews. Legal research shows that structured interviews stand up very well in court (Williamson, Campion, Malos, Roehling, & Campion, 1997).

## **The Interview Process Assesses Leadership Competencies**

A competency is a measurable characteristic related to work success. Further, the leadership competencies are behaviorally defined. Following the INTERVIEW ARCHITECT® process, interviewers can assess Lominger’s 67 Leadership Competencies by collecting specific past behavioral incidents. The value of competencies is in the common language they provide different interviewers. It is

critical that all interviewers use the same language and look for the same behaviors when evaluating a candidate. A structured, consistent interview process creates an even playing field for evaluating candidates for a position. When interviewers talk in a common language, the consistency of the interview process is enhanced (Hallenbeck & Eichinger, 2006).

Lominger's Leadership Competency Library was assembled more than 15 years ago and originates from research first conducted at the Center for Creative Leadership (Lombardo & Eichinger, 1989). Since the Library was introduced in the early 1990s, competency data have been collected from thousands of employees in over 140 organizations. The Library database is updated regularly, and a fresh study is conducted every two years (Lombardo & Eichinger, 2004).

### **INTERVIEW ARCHITECT® Collects Information from Past Behaviors As Well As Assesses the Likelihood of the Replication of Those Behaviors in the Future**

The research on successful and effective leaders shows that one of their key skills is being able to perform well under first-time and tough conditions (Eichinger & Lombardo, 2004). Effective leadership is not so much what individuals have accomplished in the past as it is what they will be able to achieve in the future when faced with new business challenges or changing strategic propositions requiring new behavior and attitudes. We call that variable "learning from experience" (McCall, Lombardo, & Morrison, 1988). It enables us to predict future performance in lesser-known assignments and changing environments. It is possible to find a person who has successfully demonstrated in the near past the exact abilities and skills needed for the job or assignment under consideration. However, it may not predict how the candidate might perform under changing conditions and requirements in the future. The ability to perform today is a useful piece of information, but it isn't all you need to know about the candidate. The Lominger INTERVIEW ARCHITECT® process assesses whether the candidate has direct personal experience involving the competency. In addition, the interview process evaluates how much the candidate understands how the skill works in theory and predicts the probability that the candidate will replicate this competency in the future.

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# PERFORMANCE MANAGEMENT ARCHITECT®

## Research Background of Performance Management

Performance management is a process that assesses progress toward achieving individual and organizational goals. Performance management and assessment has been long recognized as a fundamental building block in the selection, development, promotion, and retention of employees (Cummings & Schwab, 1973). According to a 2007 survey conducted by the Aberdeen Group, 95% of responding organizations regularly conduct performance reviews. Ironically, only 11% of the respondents indicated that they were very satisfied with the current performance management process utilized by their organizations. The Society for Human Resource Management (SHRM) estimated that more than 90% of all performance appraisal systems fail. These results demonstrate that there is a clear gap between the concept of performance management and its successful execution.

When performance management is effectively implemented, it can engage and motivate employees, reduce employee turnover, recognize and compensate top performers, protect an organization legally, and increase business results (e.g., see Cederbloom & Pernerl, 2002; Macaulay & Cook, 1994).

## What Is the PERFORMANCE MANAGEMENT ARCHITECT®?

The PERFORMANCE MANAGEMENT ARCHITECT® (PMA) is designed to improve what employees accomplish and how they get the job done. The PMA measures performance on the 10 Universal Performance Dimensions. These Dimensions are part of the Lominger LEADERSHIP ARCHITECT® Competency Library, which also includes the 67 Leadership Competencies, 19 Career Stoppers and Stoppers, and 7 International Focus Areas. The Dimensions are numbered from 81–90 in order to fit them in between the 67 Leadership Competencies (numbered 1–67) and the 101–119 numbered Career Stoppers and Stoppers. As one can observe, spaces between these sets of numbers were reserved for future list expansion.

The 10 PERFORMANCE MANAGEMENT ARCHITECT® Dimensions include such performance areas as Quantity of Output of Work (#81), Timeliness of Delivery of Output (#82), and Team/Unit Contribution (#87). What makes this architect particularly useful is that it maps competencies to each of the 10 Dimensions for individual contributors, managers, and teams (see Eichinger, Ruyle, & Lombardo, 2007).

Each Dimension represents a key aspect of how performance is achieved and has a corresponding 10-point behaviorally anchored rating scale (BARS), ranging from *misses* to *overused*. According to past research, BARS can increase both the accuracy of employee performance appraisal and ultimately the effectiveness of the organization (Benson, Buckley, & Hall, 1988; Rarick & Baxter, 1986). Other advantages of BARS include clear standards, less rating biases, better performance feedback, and more consistency.

The 10 PERFORMANCE MANAGEMENT ARCHITECT® Dimensions were derived from studies on performance management and represent the key to creating an effective performance management process in an organization. These 10 Performance Dimensions can be used by managers to (a) target goal setting, (b) monitor and document performance results, (c) coach and provide feedback, (d) write and deliver accurate performance appraisals, and (e) generate useful individual development plans. The acronym A-L-I-G-N-M-E-N-T was developed to help managers implement the Lominger system of performance management. Research has shown that effective performance management systems *align* an individual's goals and performance with the organization's strategy, culture, and objectives (Eichinger, Ruyle, & Ulrich, 2007). Moreover, successful organizations document performance results, give ongoing feedback, and offer development opportunities to enhance employee performance (Cederbloom & Pernerl, 2002).

Research also suggests that performance management should gather employee performance data linked to customer expectations and corporate strategy (Connell & Nolan, 2004; Cunneen, 2006; Smither, 1998). Consistent with Eichinger, Ruyle, and Lombardo (2007), Connell and Nolan suggested that effective performance management clearly defines and communicates the underlying purpose of providing performance management feedback to employees—i.e., for evaluative or developmental reasons.

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# STRATEGIC EFFECTIVENESS ARCHITECT™

## Why the STRATEGIC EFFECTIVENESS ARCHITECT™?

The practice of competency modeling has exploded onto the field of Human Resources (HR) during the past decade. One estimate of competency-based practices indicates between 75% and 80% of companies have some competency-driven applications currently in place (Schippmann et al., 2000). However, if competency models are to be helpful, they must be properly designed. Most importantly, the competency system adopted by organizations must be aligned to their strategies. Edward Lawler and his colleagues recommend that HR should take a strategic partnership role that contributes to business development and implementation based on the consideration of human capital, organizational capabilities, and organizational readiness (Lawler & Mohrman, 2003). Becker and Huselid (1999) presented empirical evidence of HR's impact on strategy and value creation. In their study, organizations with HR practices aligned and integrated into the organization substantially outperformed other organizations that adopted a more traditional perspective on HR practices. They observed that when each HR system element is aligned, particularly when HR is aligned with corporate strategies, firms average 27% higher gains than they would expect from the "sum of these parts" (Becker & Huselid, 1999). In studying how top 20 companies grow great leaders, Hewitt (2005) found that top companies possess the right programs and execute them properly. Top companies differentiate themselves by effectively utilizing their practices to develop leaders in support of their business strategies. The Human Resource Planning Society's annual State-of-the-Art Survey reported that HR needs to understand the business in order to (a) link HR initiatives to the business, (b) link HR initiatives to the firm's strategy, (c) link HR initiatives to customer value, and (d) understand the customer (Eichinger & Ulrich, 1997).

The benefits of strategic alignment are well documented. Yet, only 24% of firms report that they have a competency system aligned to their strategy (Lawler & Mohrman, 2003). The STRATEGIC EFFECTIVENESS ARCHITECT™ (SEA) was developed to help organizations align their competency-based HR practices to their business strategies. It is achieved by identifying organizational capabilities that are important for the successful execution of the strategies, and then translating these organizational capabilities into a list of mission-critical competencies (Eichinger, Ruyle, & Ulrich, 2007).

## How Was SEA Created?

The STRATEGIC EFFECTIVENESS ARCHITECT™ is an update and extension of the ORGANIZATIONAL CULTRIBUTE ARCHITECT®. A "cultribute" is defined

as a combination of selected organizational core competencies, organizational capabilities, and cultural attributes which, when active, either enable or chill an organization's implementation of strategic change. The development of the ORGANIZATIONAL CULTRIBUTE ARCHITECT® was a collaboration of Dave Ulrich of the University of Michigan and Bob Eichinger and Mike Lombardo from Lominger. In creating the tool, the authors drew from a combination of research, case histories, and their combined consulting experiences with hundreds of companies. Through an extensive literature review, they developed the initial items. These items have been pilot-tested on 1,000 (mostly) managers (62% of the sample). The 80 Cultribute items were organized into 16 clusters based upon the results of a factor analysis. Since then, the ORGANIZATIONAL CULTRIBUTE ARCHITECT® has been used by many organizations, including several Fortune 500 companies. In the past decade, there have been new trends in the business world, and it became apparent that the organizational capabilities for successful execution of organizational strategies should address the issues related to these new situations. Examples of these new trends include outsourcing, supply chain management, board responsibility, talent management, and employee engagement. Dave Ulrich and researchers at Lominger, including Bob Eichinger, Mike Lombardo, and Kim Ruyle, examined the continuing research since the introduction of the ORGANIZATIONAL CULTRIBUTE ARCHITECT®. They also surveyed users to see what needed changing and what needed to be added to address these emerging business issues. Based on this new research and consulting experiences, the set of organizational capabilities has been expanded to 95 items, grouped into 8 dimensions and 20 clusters. Each of the 95 organizational capabilities is mapped back into the LEADERSHIP ARCHITECT® Competency Library. Raters are required to rate the organization's *current organizational capability* on a 5-point scale, ranging from Behind the Pack (1) to Leading Edge/Best (5), as well as the *capability's importance level* (1 = Not Important to 5 = Mission Critical).

## Example of SEA Items

1. Align people policies, practices, and programs to support our business strategy.
2. Use our strategy to guide decision making.

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# SUCCESSION ARCHITECT®

## Identify and Develop Talent Early

Much has been said about the managerial succession crisis in America. Who will lead the business in the new millennium? Baby Boomer managers are retiring; CEO tenure is shrinking. In today's competitive economy, CEO tenure is down to a median of five years. Moreover, between 1995 and 2003, CEO turnover increased 170% (Lucier, Schuyt, & Handa, 2004). To fill these vacant leadership positions, companies have two options: (a) buy talent by hiring outsiders, or (b) develop talent internally. Outsiders generally are chosen because they can do a specific job—turn around the company or restructure the portfolio. Unfortunately, external candidates in many cases are a greater risk than internal candidates. For example, 55% of outside CEOs in North America who departed in 2003 were forced to resign by their boards as compared with 34% of insiders. Rather than focusing on competing for the short supply of outsiders, many companies are looking inward to develop future leaders. To increase the likelihood of finding a leader who will serve long and well, companies should have available a deep pool of internal candidates, kept well stocked by a leadership development process that reaches from the bottom of the organization to the top (Charan, 2005). In many companies that have succession plans, the window in which to identify CEO talent is narrow. Organizations require sufficiently seasoned candidates who can be counted on to hold the top job for a decade or more. This puts the age of accession between 46 and 52. For potential candidates to be ready by 46, serious development needs to start by age 30 (Charan, 2005). Lominger proposes a succession process that identifies seven CEOs from the top down to the benchwarmers into the leadership pipeline (De Meuse, Dai, & Tang, 2007).

## A Formal High Potential Identification Process

Succession planning is not a new phenomenon. Nevertheless, fully 74% of companies that invest in a succession planning process continue to struggle to fill talent pipelines (Aberdeen Group, 2006). One of the most critical drivers for implementing succession planning is to have in place a formal, high potential identification process. In studying top companies for leaders, Hewitt Associates (2005) found that 95% of the *top companies* formally identify high potential leaders as compared to 77% of other companies. Best-in-class companies are more advanced in the ability to identify talent (Aberdeen Group, 2006). Many companies confuse high potentials with high performers. In reality, high potentials are rare. Top companies recognize this distinction and assess high potentials separately from high performers. Research suggests that only a

relatively small percentage of leaders who are identified (about 11%) truly are high potentials in top companies (Hewitt Associates, 2005).

Lominger has developed a nine-cell matrix to help organizations identify candidates for leadership development. The matrix measures employees along two distinctive dimensions: (a) performance and (b) potential. In Lominger's terminology, high potentials are defined as highly agile learners (Lombardo & Eichinger, 2000). The ability to learn from experience is how an individual demonstrates what is termed high potential. We call this ability to learn from experience "learning agility." (CHOICES ARCHITECT® is the Lominger instrument that measures this personal construct.) Studies have demonstrated that learning agility is a valid predictor of performance and potential (Connolly & Viswesvaran, 2002; Lombardo & Eichinger, 2000). The Lominger Performance Potential Matrix is an advanced talent assessment tool that has been used in many companies (e.g., PepsiCo, RohmHaas, Novartis).

## **The Nine-Cell Development Plan**

Research has repeatedly found that true development happens on the job, not in a classroom. Studies suggest that development should follow the 70-20-10 rule. Seventy percent is derived from experiences both on- and off-the-job, including full- or part-time assignments. Twenty percent should come from other people (e.g., coaches, mentors, one's boss). And 10% should come from courses. Few companies know how to expose their best employees to the experiences that would prepare them for an upper-managerial role or to rigorously evaluate them in the jobs they perform (Charan, 2005). Lominger has designed a nine-cell development plan that tailors each cell of the Performance Potential Matrix. The match between the nine developmental plans and the nine-cell matrix is based largely on the research conducted at the Center for Creative Leadership (CCL). The CCL research identified 88 developmental experiences that are likely to develop leaders (Lombardo & Eichinger, 1989).

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# TEAM ARCHITECT®

## What Is the TEAM ARCHITECT®?

Teams are used increasingly by a wide range of organizations. A team refers to a group of people with complementary skills who work toward a common goal with collective responsibility for the group's outcomes (Katzenbach & Smith, 1994).

Numerous studies have shown that teams can improve their job performance—product/service quality, productivity, customer satisfaction, and employee satisfaction (e.g., Gross, 1995; McShane & Von Glinow, 2004). However, not all teams work well. According to Gross (1995), teams typically fail due to unclear goals and objectives, inadequate management support, ineffective team leadership, little mutual accountability, lack of team rewards, and/or inadequate team member priority. In order to establish an effective team, several things are needed, such as communication skills, competent members, technical tools, organizational and time-management skills, problem-solving skills, independent decision-making skills, conflict management, and knowledge of how organizations really work (e.g., Hoefling, 2003; Robbins & Finley, 2000).

The TEAM ARCHITECT® is based on the research that has identified the key behaviors imperative for high performance teams (De Meuse, 2007). Although several typologies of team behavior and functioning exist (e.g., see Kozlowski & Ilgen, 2006), this measure is one of the most detailed in the marketplace. In a review of the literature which focused exclusively on top management teams, the TEAM ARCHITECT® also was demonstrated to be applicable (Dai & De Meuse, 2007).

## How the Measure Is Structured

The TEAM ARCHITECT® measures seven factors of team functioning. These seven factors compose Lominger's T<sup>7</sup> Model of Team Effectiveness. These seven factors include:

1. Thrust
2. Trust
3. Talent
4. Teaming Skills
5. Task Skills
6. Team Support Provided by the Organization
7. Team-Leader Fit

The first five factors assess conditions, skills, and processes *inside* the team. The last two factors measure issues *outside* the team. Factor six examines the

degree of support an organization provides the team. Factor seven diagnoses the match (or fit) between the team members and the team leader. Embedded in these seven factors are 20 dimensions of team functioning that the T<sup>7</sup> Model suggests are critical for successful team performance, ranging from Thrust Clarity and Thrust Commitment to Conflict Resolution and Team Atmosphere.

The TEAM ARCHITECT<sup>®</sup> is available in an electronic 360° feedback version, known as eTEAM<sup>™</sup>. Clients can choose to assess all seven factors, the initial five factors, or a combination of the first five with factors six or seven.

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# VOICES<sup>®</sup> 360° FEEDBACK SYSTEM

## Why Was the VOICES<sup>®</sup> 360° Feedback System Created?

It has been estimated that nearly all of the Fortune 500 and 90% of the Fortune 1000 companies have used or intend to use multisource feedback in some form (Atwater & Waldman, 1998; Hedge, Borman, & Birkeland, 2001). Multisource feedback or 360° feedback refers to evaluations gathered about a targeted individual from two or more rating sources in positions above, below, and lateral in the organizational hierarchy. Multisource feedback is used to systematically obtain information about how others perceive one's behavior and performance. The data then are compared to one's own views. According to a meta-analytic study conducted by Harris and Schaubroeck (1988), ratings between peers and subordinates agree to a greater extent than ratings between self and others. Self-ratings also tend to be higher on average than ratings provided by others. Further, a meta-analysis published by Conway and Huffcutt (1997) confirmed Harris and Schaubroeck's (1988) conclusions and extended their research to show that it is crucial to include subordinates' ratings in multisource feedback because of their unique perspective relative to peers and supervisors.

In addition, research has found that competency-based 360° feedback is more effective for development than for performance management, selection, and other HR-related needs (London & Wohlers, 1991; Toegel & Conger, 2003). For example, London & Wohlers (1991) reported that 34% of raters would rate their boss higher if the feedback was used for performance appraisal rather than for developmental purposes.

VOICES<sup>®</sup> utilizes Lominger's LEADERSHIP ARCHITECT<sup>®</sup> Library as the foundation for assessment. The Library contains 67 Competencies (characteristics generally considered beneficial for career success) and 19 Career Stallers and Stoppers (characteristics generally considered harmful to career success). The Competencies and Career Stallers and Stoppers were derived from a detailed content analysis from many different sources (e.g., major research findings at the Center for Creative Leadership, long-term studies at AT&T and Sears; Lombardo & Eichinger, 2004). Since the original development of this Competency Library in the early 1990s, Michael Lombardo has been tracking the new research regularly to look for emerging leadership competencies. The Lominger LEADERSHIP ARCHITECT<sup>®</sup> Library is considered the most comprehensive in the field of leadership.

## Lominger's VOICES® Instrument

VOICES® is Lominger's research-based and experience-tested solution for delivering 360° feedback that helps career-minded employees to succeed. It is an objective way of rating skills from a representative sample of people who work with a given individual. Both competency *skill* and *importance* can be rated. An employee's skill is measured on a 5-point scale, ranging from A Serious Issue (1), A Weakness (2), Skilled/OK (3), Talented (4), to A Towering Strength (5). How important a given competency is for the job is likewise rated on a 5-point scale, ranging from Not Important (1), Less Important (2), Useful/Nice to Have (3), Very Important (4), to Mission Critical (5). In addition, raters have an opportunity to indicate the employee may "overuse" each of the 67 Competencies. Companies also have the option of having participants rated on the 19 Career Stoppers and Stallers. The VOICES® feedback report includes additional information, such as an individual's blind spots and hidden strengths.

## VOICES® Norms

Since the development of the VOICES® instrument, Lominger has conducted multiple normative studies and regularly updates the norms for its users. Recent findings include:

- Overall, North American norms pertaining to "skill" rankings have been relatively stable during the past four years. The results indicate that managers' relative strengths and weaknesses have remained pretty much the same over the years.
- Overall, North American norms pertaining to "importance" rankings also have been relatively stable during this time.
- Mean competency ratings (as opposed to rankings) for *both* "skill" and "importance" generally have increased between 2002 and 2006. This finding is particularly prevalent for "skill" ratings. For example, the mean skill rating across all 67 competencies was 3.59 in 2002 and 3.73 in 2006.
- Norms suggest that females do not differ significantly from males on overall leadership. However, females tend to be more skilled in interpersonal areas; whereas, males tend to be more skilled in business acumen and strategy.
- The findings also indicate that very few differences exist between Caucasians (classified as the "majority group") and the "minority group."
- Competency skill ratings were found to increase as one climbs the organizational ladder. For example, the mean skill rating across all 67

competencies was 3.55 for individual contributors, 3.67 for first-level managers, and 3.77 for senior-level executives.

- Finally, analyses have found very few differences in skill and importance ratings around the world. Overall, the results reveal more than 80% similarity among the four international regions examined (Asia, Europe, New Zealand/Australia, and North America).

The above findings are presented in three technical reports available at Lominger (Dai & De Meuse, 2007a, 2007b; Tang, De Meuse, & Dai, 2007).

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## ABOUT THE BIG EIGHT

The “Big 8” refers to the eight competencies significantly correlated with performance and promotion potential across organizational levels *and* with generally rated low skill levels. The evidence came from Lominger’s research and others’ research, particularly leadership studies conducted at the Center for Creative Leadership (CCL).

### Skill Ratings Associated with the Eight Competencies

The eight competencies are generally rated low in the population, regardless of the position level. The following table depicts the population rank order of the eight competencies. The data were obtained from 5,354 learners rated by 47,592 raters from 140 organizations collected from 1997 to 2002.

Competency	Rank Order
2. Dealing with Ambiguity	47
14. Creativity	49
28. Innovation Management	52
36. Motivating Others	56
47. Planning	51
58. Strategic Agility	58
60. Building Effective Teams	60
65. Managing Vision and Purpose	62

Source: Lombardo and Eichinger (2003).

## Relationship with Performance

Lominger collected independent performance ratings from roughly 2,000 learners from the sample mentioned above. The table below shows competencies that are significantly correlated with performance ratings at various position levels. Six of eight competencies were found to be consistently correlated with performance.

Competency	Overall	Individual Contributor	Manager	Executive
2. Dealing with Ambiguity				√
14. Creativity	√	√	√	√
28. Innovation Management	√		√	√
36. Motivating Others	√	√	√	√
47. Planning	√	√	√	
58. Strategic Agility	√	√	√	√
60. Building Effective Teams				
65. Managing Vision & Purpose	√	√		√

Source: Lombardo and Eichinger (2003).

## The Reason for Derailment

CCL conducted many studies attempting to identify traits and behaviors associated with leaders who derail (e.g., Lombardo & McCauley, 1988; McCall & Lombardo, 1983). Derailment occurs when a manager who is projected to go higher in the organization (and who is judged to have the ability to do so) is fired, demoted, or plateaued below expected levels of achievement. Two factors which are associated with derailment across cultures are (a) having problems with interpersonal relationships, and (b) inability or unwillingness to change or adapt (Leslie & Van Velsor, 1996). Two competencies that are closely related to these two factors are Building Effective Teams and Dealing with Ambiguity. People who are low on these two competencies are less likely to get promoted.

## Summary

The Big 8 was identified based upon Lominger's research examining skill ratings and the correlations between the competencies and performance ratings, as well as research investigating derailment factors. Individuals are generally rated low on these eight competencies. Overall, these eight competencies predict performance and/or promotion for various positions in an organization.

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