in collaboration with:

Assessments and Simulations: A Discussion with the Elephants in the Room

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Introduction

Organizational psychologists have long favored assessments and simulations as a means to evaluate and build workers' skills for better productivity and business outcomes. In the life sciences and B2B arenas, these methods have piqued interest of late. When it comes to training and development efforts, assessments and simulations seem to be turning into the next "shiny new object".

Assessments and simulations can be powerful, engaging tools to help with business growth challenges in today's global, social world. However, as leaders are jumping on the bandwagon — engaging with suppliers and consultants to execute assessment and simulation programs — oftentimes, potential impact is getting lost in the novelty. Good money (and precious time) is being thrown at suboptimal efforts.

Moreover, the paradigm we use to approach our workforce is evolving. Assessments and simulations have their roots in a time where we considered our people to be machine-like — organizational assets that must be mechanistically optimized and continually upgraded. Traditional assessments and simulations also typically require busy executives to spend significant amounts of time — sometimes even a day or two — out of the office.

But it doesn't have to be this way. Today, we're looking for ways that are more people-oriented and more relevant in a global, social, and digital world. As learning and commercial leaders, we have tremendous opportunity to evolve the space of assessments and simulations to better suit our fast-changing, turbulent business environment, and to best reflect the changing tastes, dreams, and expectations of those working in it.

To pursue a more progressive assessment or simulation program, we invite a discussion with a few elephants in the room. Addressing these three elephants can help you create an initiative that not only makes a difference to the bottom line, but also results in something that your learners actually crave.

About the white paper: lime LLC, a marketing strategy & capability company, and Sales Rampage, a sales capability company, DriveTrain, an account management capability company, and Fused, a data-driven performance and learning provider, work in partnership to deliver relevant and engaging sales and marketing assessments and simulations. Our work together over the years has revealed important myths, missteps, and must-dos organizations need to know in order to implement programs that matter to their personnel. As part of a collective of deep marketing, account management, and sales capability specialists who are unsatisfied with typical capability-building approaches, we are leading an insurgency to help companies get to the bottom line, faster.

Elephant 1: What Are We Actually Doing Here?

As we've become more intrigued about assessments and simulations in a for-profit, commercial setting, we've fallen into the common trappings of sloppy jargon. We've stopped being precise when choosing our words, and as a result, meaning is shifting. Everyone seems to have her/his own personal conceptualization, and even within the same corporate function, we aren't speaking the same language. Worse, some terms have been bastardized into snazzy buzzwords, losing their significance and distinct meaning. For instance, we've seen the term "simulation"— a sophisticated skills measurement and/or practice method that uses feedback in an imitated real-world setting — being used to describe a 5-minute knowledge test delivered over the mobile phone. For sure, our attraction to the shiny object has gotten us caught up in the game of bullshit bingo.

Semantics are important because they represent intent. We can't force the use of a disciplined, common terminology, but that means when we use these terms, we become less clear on what we are actually trying to achieve together with our people and our limited resources. We have not taken the time to be deliberate. We are not having the conversation we need to be having. Maybe we've even gotten a little lazy. It is a big deal.

Let's hold off on naming something an "assessment" or "simulation" until after we've answered the question: what's the point?

Enough gobbledygook. Instead, we should be asking each other: What's the point?

Rather than spin conversation by loosely throwing out words like "assessment" and "simulation" to describe what we're *doing*, instead, let's talk about where we want to *end up*. What are we trying to learn, decide, or achieve? What's our purpose? Why are we wanting to do what we want to do? What type of effect are we trying to have on the commercial organization? Let's hold off on naming something an "assessment" or "simulation" until *after* we've answered the question: what's the point?

From our experience, we find that, most times, conversations about assessments and simulations are really about a continuum of two main needs: Diagnose and Develop. We're trying to understand where we are and where we need to get better. Or, we might want to enhance a skill set in an experiential way outside of a traditional, live, didactic setting. And, let's not forget: "Develop" is a big bucket. There are so many different methods, modalities, and techniques — beyond just the sexy simulation — that may be more useful in meeting an organization's goals.

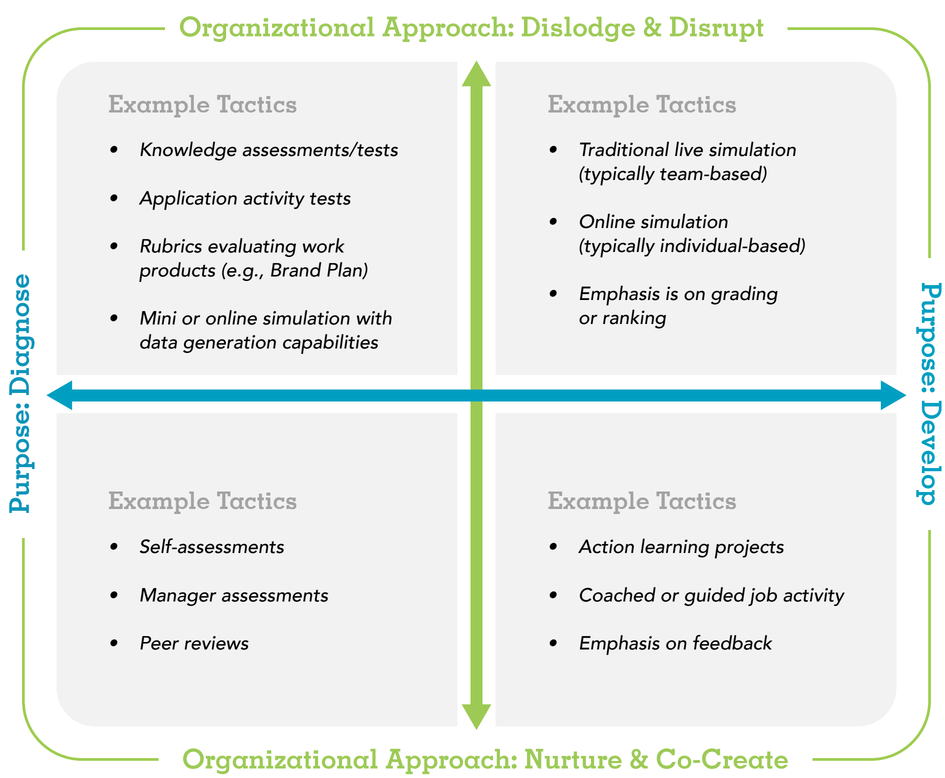
Another point to consider is: what is the program trying to do to the company culture? Sometimes, an organization is struggling with change, and the capabilities program is trying to dislodge stuck thinking and disrupt old patterns in favor of new ones. Other times, everyone's on board, and now's the opportunity for the capabilities program to help nurture learners and leverage them to co-create solutions in a world where there might not be a clear answer.

The first place to start is identifying where to go. What do you need to learn? What decisions are you trying to make? What do you hope to achieve?

What Do We Need to Achieve? A Focus for Conversation.

To help foster a more effective program design conversation, we propose the following schematic to help lay out these dimensions as leaders are engaging in program design.

With this graphic, the exercise of identifying purpose (described by dimensions of Diagnose/Develop and Dislodge & Disrupt/Nurture & Co-Create) is separated out from the exercise of identifying tactics (e.g., an assessment, a simulation). Starting with the question "What do we need to achieve?" can make for a richer and more effective program design than diving right into assessment or simulation discussion.



As you embark on this conversation, it's also important to be specific and prioritize when answering these questions. When choosing a destination, for example, you can answer, "We want to go to Florida". Great, but where, exactly? Orlando, the Panhandle, Miami, or the Keys? Each place offers very different experiences, and you can't do it all under fixed timing or budget. You've got to be specific and make choices. For instance, are you focused on broad, rudimental, technical awareness, or deep expertise in certain topics such as insight or value propositions?

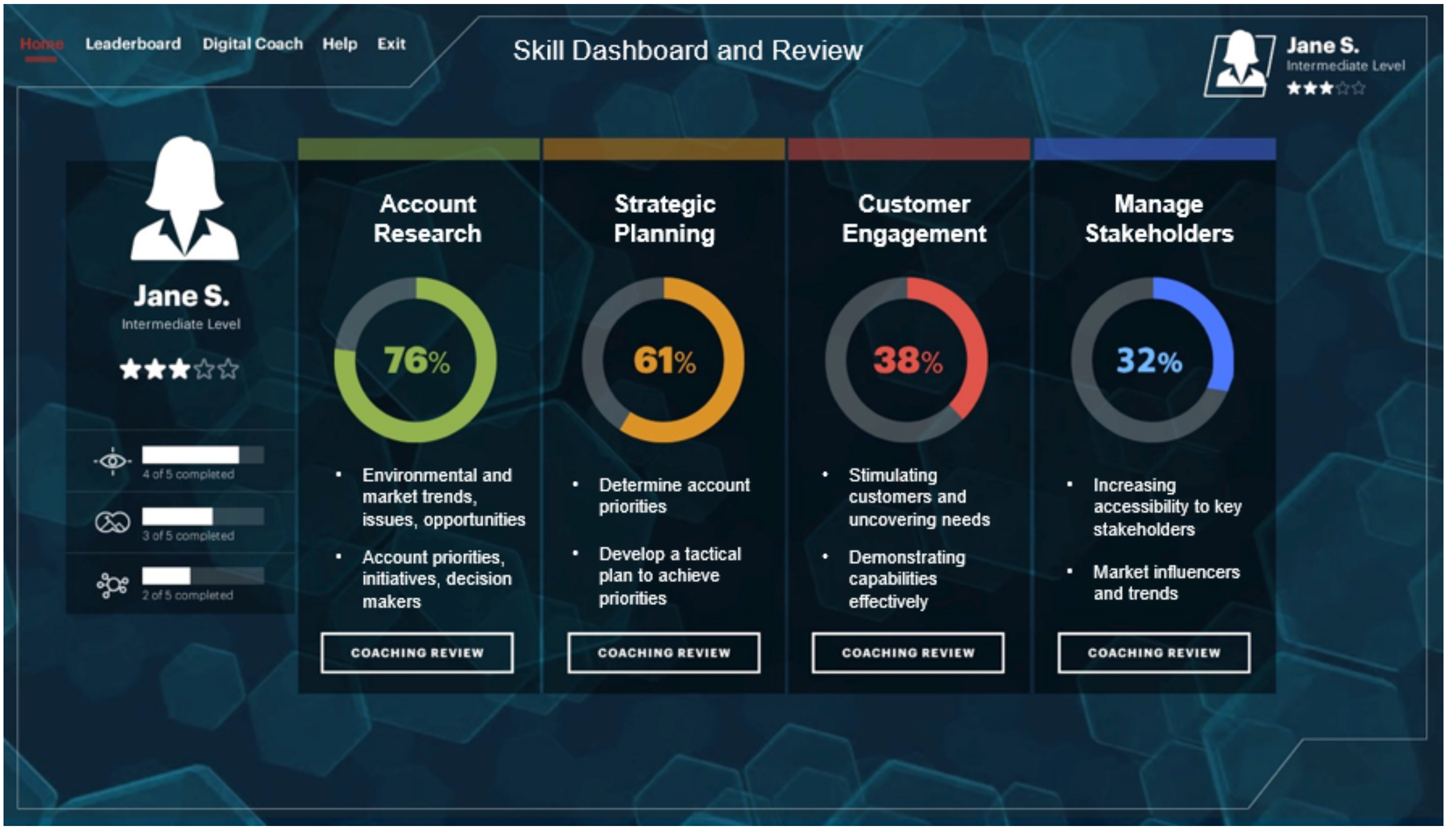
To what extent are you exploring the intersection of other aspects of commercial success, like leadership, stakeholder engagement, or innovation? Are you interested in measuring what happens in teams, or at the individual level, or some mix of both? It's critical to outline the key knowledge, beliefs and tasks that are essential to business success for the situation at hand — and possibly engage learners in helping identify exactly what these are!

MARKETING Case in Point:

When developing a marketing simulation for a B2B client, one of the issues the client faced was that marketers often tripped up when implementing strategic decisions in light of a heavily matrixed stakeholder team. In the simulation activity, we incorporated situations that mimicked the real world issues of managing multiple opinions that may or may not come from a place of informed expertise. In conjunction with other marketing technical skills, marketers received scores and feedback based on how they leveraged stakeholders, recognizing that sometimes consensus is helpful when making good marketing decisions and other times it is detrimental.

SALES Case in Point:

When developing a sales simulation for a B2B client, one of the issues the client faced was that account managers were not behaving in a customer-focused way throughout the sales cycle. These behaviors negatively impacted the length of sales cycle, the size of deals, and they limited the organization's ability to deliver a valuable customer experience. In the simulation activity, we immersed account managers in customer engagement scenarios that mimicked hurdles in the sales cycle to see what their "go-to" behaviors were when they were presented with typical, *everyday*, challenging situations. Account managers received scores, feedback and personalized learning assets based on how they analyzed customer data, engaged with customers in various parts of the sales cycle, managed various aligned and misaligned stakeholders, and negotiated a mutually beneficial deal. This approach helped pinpoint the specific skills throughout the sales cycle that were leading to suboptimal results with customers.



Elephant 2:
Is There Even a Truth Out There That Can Be Measured?

When assessments and simulations were first conceived for work and military settings, the modern world seemed to be one where things were more knowable and certain. There was a right or wrong. Cause and effect were clear. What was classified as a "truth" or "untruth" remained undisputed. Sure, stuff got complicated and messy, but there seemed to be an underlying natural order, even if life wasn't perfect. Assessments and simulations were built upon this underlying natural order.

Today, it's natural *disorder*. We're living, working, and strategizing in postmodern times. Knowing and certainty have been replaced by ambiguity and hyper-volatility. The rules of conventional wisdom don't always reveal the best way forward. Knowledge isn't always power (and too much information becomes debilitating!). There isn't an "answer key" as to what makes for business success. As leaders, we are often at a loss to generalize, categorize, or predict ways that make for future success. On top of all this, it's happening at warp speed.

"Not everything that can be counted counts, and not everything that counts can be counted."

-Albert Einstein

As a result, our legacy go-to marketing and sales frameworks have become less useful these days. We can't even agree on questions like: What is the role of a marketer? How should personal selling fit into the digital world? What is the one, commonly accepted, got-to-market model or process? What skills will drive business success? This fluidity becomes heightened when we apply these questions to leadership. Try getting agreement on: What is a great leader? What do great leaders do? What is the one, commonly accepted leadership model or process?

Under these circumstances, it then becomes hard to develop assessment and simulation instruments that are scientifically reliable and valid. If there isn't one model of success — a world we know for sure — then how can we develop a hardcore, replicable measure for attributes that are proven to lead to success? If the world is constantly changing, how can we be reassured by validity, when what was certain in the past may not be so in the future?

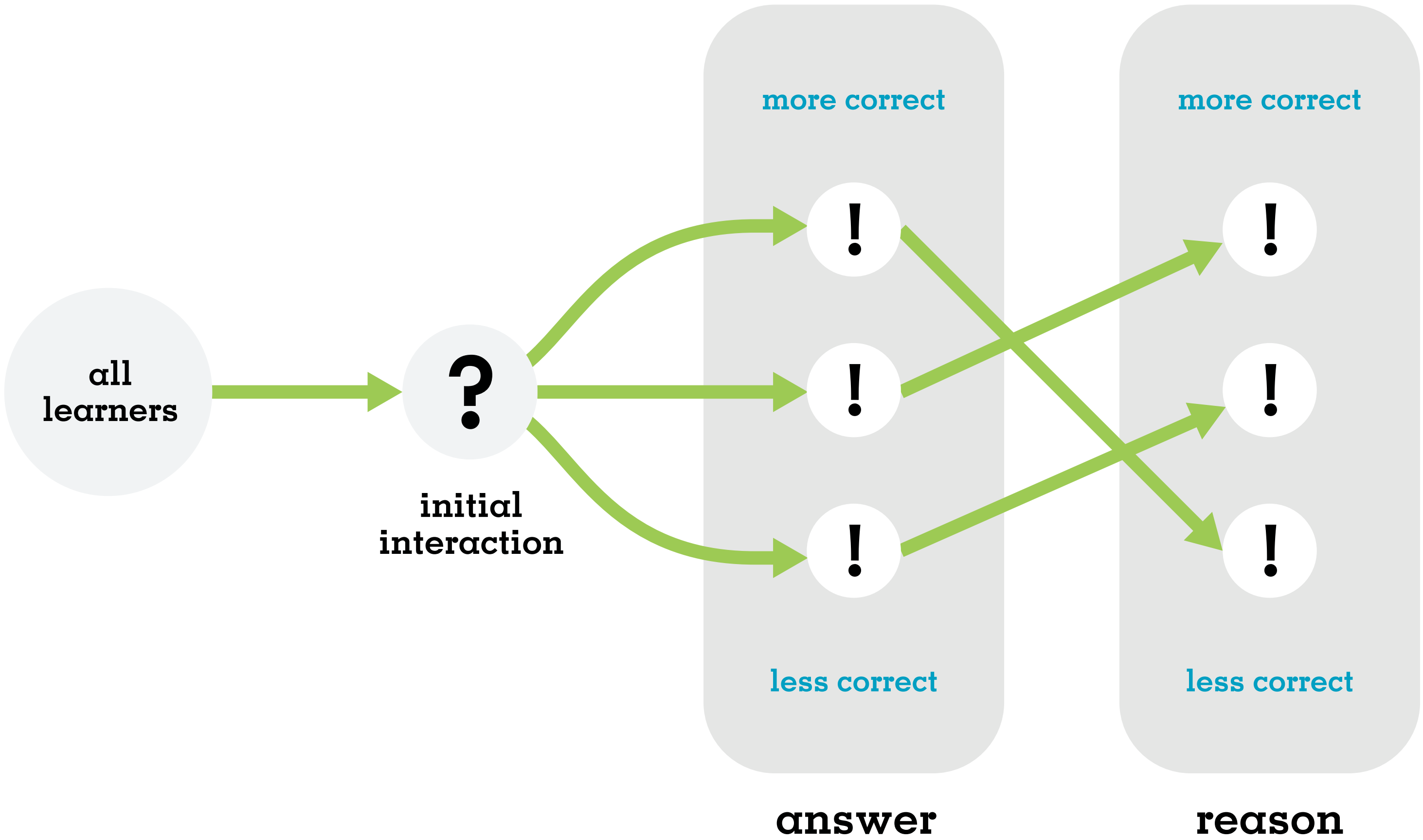
Yet — arguably rightfully so — we remain drawn by the need to assess and measure our people. So, we end up focusing on things that we can isolate and study in an objective manner. We try to measure what's easy to measure. But…are these the most useful things? Any executive will tell you that a controlled laboratory study does not represent business life. Rather, an executive's technical skills intersect with her/his disposition, capacity and passions, which then become entangled in the reality of the relationships of peers, managers, leaders, competitors, markets and customers. Sure, it's fairly straightforward to design a test that evaluates the skill in building a strategy from a range of preconceived choices, for example, but does that truly represent our *reality*? What can our executives learn from engaging in artificial exercises like this?

Instead, our efforts should consider how to focus on factoring in the other mitigating forces that make for commercial success — forces like imagination, team chemistry, strategic discipline, prioritization, cross-functional alignment, and even luck. Without a doubt, business impact is revealed when we try to create a decent, useful framework for evaluation in a world where there isn't one answer at the ready.

These practical challenges are not set out here to dissuade us from trying to assess. For sure, we should not give up on trying to craft a framework and evaluate against it. We need data! What it means, though, is that we need to be realistic and nuanced in our framework, recognize the imperfect nature of it, and be wary of claims about the certainty our measures measure. As leaders, we need to appreciate these challenges and factor them into the conclusions we draw and the actions we take. These are just a few ways we can shift from a mechanistic approach to our people to a more human one that represents a reality experienced.

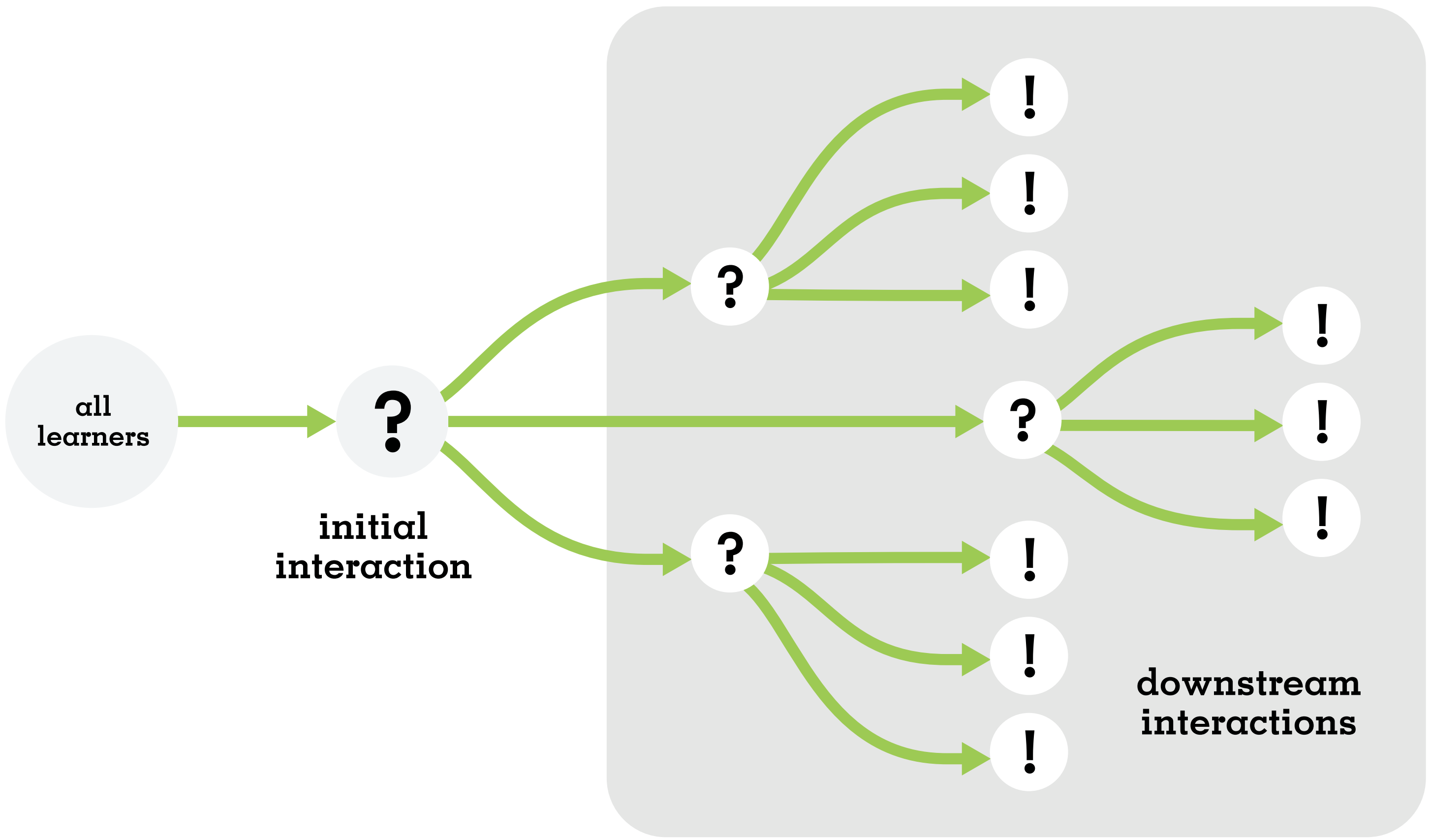
MARKETING Case in Point:

As part of a recent marketing simulation build for a large B2B company, we incorporated thought process questions to assess how marketers were analyzing to get to the right answer, as opposed to just scoring if they got the answer right. We looked at key principles they applied and the extent to which others' opinions should or do matter. This information provided a useful diagnostic for understanding how we could improve marketers' strategy development abilities in future training and change management programs, emphasizing feedback over raw scores.



SALES Case in Point:

As part of a recent account management simulation built for a large healthcare company, we incorporated branching scenarios to assess how decisions made in the simulated sales activities rippled throughout a contracting cycle. Given multiple options every step of the way — varying from excellent to poor choices, with numerous sub optimal choices in between — account managers made decisions and had to deal with the implications of these decisions as they navigated down the sales path. Using this process as opposed to a traditional "right or wrong" approach, we were able to ascertain nuances in decision-making. This information proved to be an extremely useful diagnostic that helped identify specific, micro areas that could be improved in account managers' strategic approaches. The data generated provided leadership and coaches with precise, individual data that informed their development and coaching plans for each account manager.



Elephant 3:
No One Likes to Be Evaluated!

The final major concern we aren't talking enough about is: What is it like going through an assessment or simulation? What impact do these programs have on the feelings of employees about their work, their company, and themselves? How does the employee's experience impact the quality and usefulness of the assessment or simulation results?

Would YOU want to go through the program you're about to implement with your people?

First, let's be honest here. No one likes to be evaluated.

We can couch it 'til the cows come home — "it's intended to help YOU in your skill-building" or "we're committed to your development"— but, let's face it, the reason companies do an assessment or simulation event is to improve productivity or drive the bottom line, even if the lever of "investing in employee development" is proclaimed. Come on, deep inside us we know: If it didn't benefit the company in some direct or indirect way, it simply wouldn't be something people would be required to do. Employees can smell false justifications a mile away! Why in corporations do we do this to ourselves? As leaders, let's treat our learners with the credibility and respect they deserve by calling things as they are. *Don't try to sell me a bag of manure.*

It's important to point out: we *do* need to measure things. When we look at nature, creatures survive because they gather feedback about their environment and themselves, and then adapt. Creatures thrive — our people thrive, our businesses thrive — when we adapt. We need information — what we assess and evaluate — so we know where and how we need to change. We need feedback mechanisms, whether it be at an individual, team, or organizational level. Just looking at our strengths (a strengths-based approach) can help with what we might leverage or amplify (and this feedback is certainly easier to digest!). This approach, though, misses identifying new critical areas to grow, or places to shift what's getting in the way of our survival, evolution, and success. An "all good" mindset may not inoculate us against a turbulent, global, fast-changing environment. We also need data to help us prioritize where and with whom to target our limited resources for training and development.

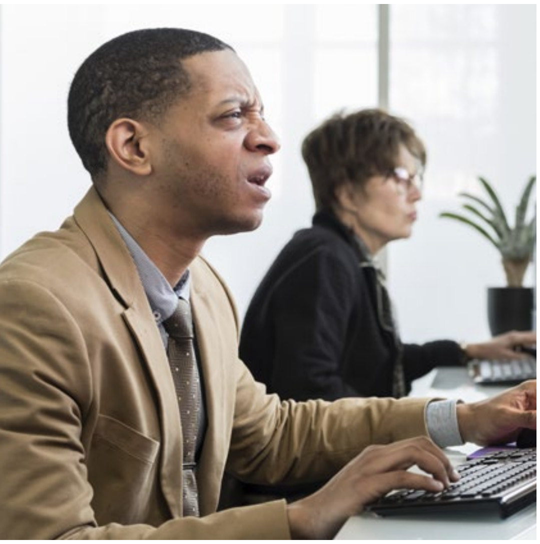
As leaders, designers or implementers, we need to validate the legitimate feelings and reactions people have about being measured. We need to stop justifying or rationalizing the benefits or trying to explain why they should like it. We need to empathize with what it takes to manage the pain that accompanies feedback, no matter how welcome or needed the feedback is.

Second, it sucks being in the hot seat!

With these programs, learners know they are being watched with scrutiny — the spotlight is on them, and there is nowhere to hide or save face. Assessments and simulations may threaten learners' egos or make them feel the standing and status they've earned through their past experience, accomplishments and reputation is vulnerable. In a Western culture like ours, where work and identity are often tightly linked, employees' individual results get at the core of who they are as people. All of that becomes at risk when we measure them. To be sure, methods that are being used to measure and teach concepts in graduate MBA school may not be as useful and practical for the corporate adult learner responsible for driving profit. Immersive methods for full-time, active duty military personnel may not be feasible to implement in a business setting where other demands compete for time to "learn and grow".

In addition, what is often not discussed in assessment circles, is how the act of a person being "studied" and interacting with the study instrument itself impacts the results we will get. The learner knows she/he is being evaluated and the stakes may be quite high, even if only to the individual's ego. How might that impact response integrity? In a culture where individual achievement is coveted currency, saying "be honest in your response, as this is for your own development" lands on deaf ears. *My own development is fine as long as I show how good I am*. Any assessment or simulation has inherent bias in it for this very reason. We can take steps to mitigate this bias, such as having multiple people provide input on a process, or by asking learners for their opinion and/or current practices, and then having them do a scenario exercise to see if that's what they actually do when faced with a hypothetical situation. We need to be critical of our testing instruments to ensure we've minimized bias as much as possible. But remember — we can never fully remove bias!

We must factor this reality into how we design programs and into how we interpret results. We must identify bias potential upfront, take steps to mitigate the bias in the methodology (as with any research), and be clear in what is and isn't appropriate when developing conclusions with absolutism. We also need an implementation success plan and an authentic and believable communication platform that treats adults as they would like to valued and respected.



Third, we often create assessment or simulation programs without thinking about the learner experience.

Are we being sensitive and empathetic to those who actually have to be assessed or who are going through the simulation? Are we creating a test that we're secretly glad WE don't have to take?

As we create programs we need to mindful of how they would be experienced by the learner at a cognitive, physical, and emotional level:

- Are learners being required to engage in a program right in the midst of a busy season of work? How is the timing relative to all the other business demands out there? How is the learning topic relevant to work they are already doing at this point in time in the business cycle?
- How does the length of the event impact the quality of information and the taste in the learners' mouths? Anyone would get fatigued during a monotonous 50-plus question assessment, for example — how might that impact the accuracy of the results? Who wants to sit through 4 straight hours of simulation? Instead, what are the possibilities available to deliver a program in bite-sized snacks versus multi-hour or day-long "all-you-must-eat" buffets?
- Is the scoring and feedback fair from the perspective of the executive? Do the "right answers" shore up with their own mental models of what's right, and if not, how are executives being supported to see alternative ways?
- Based on previous things going on in the company — for example, perhaps a wave of recent layoffs or a tough financial year — are employees in a place where they want or can hear the feedback, trust you and your intent, and be motivated to do something about it?

We must put ourselves in the shoes and seats of our people who are actually going through the program, and consider the unintended consequences of what we are doing and how that might impact what we find. We need to create safe spaces and allow them to save face.

Finally, the assessment or simulation program has the opportunity to bring about the change we want to see in our organizations and our people.

As Gandhi famously said, we need to be the change we want to see in the world. Given where people are, we may need to shake things up and reinvent a new status quo. Hence the experience we create with our programs may be more disruptive in nature. Conversely, there already may be some excitement, openness, and self-awareness, and we may want to take a more nurturing approach, where the learners can be co-creators in the actual knowledge, and new ways of working can be identified, new commercial approaches developed. In a world where there isn't an answer key, the assessment or simulation might be the catalyst for *creating* a new model or framework, rather than needing to be *reflective* of a finished one. Instead of being evaluative, perhaps the program becomes generative in nature.

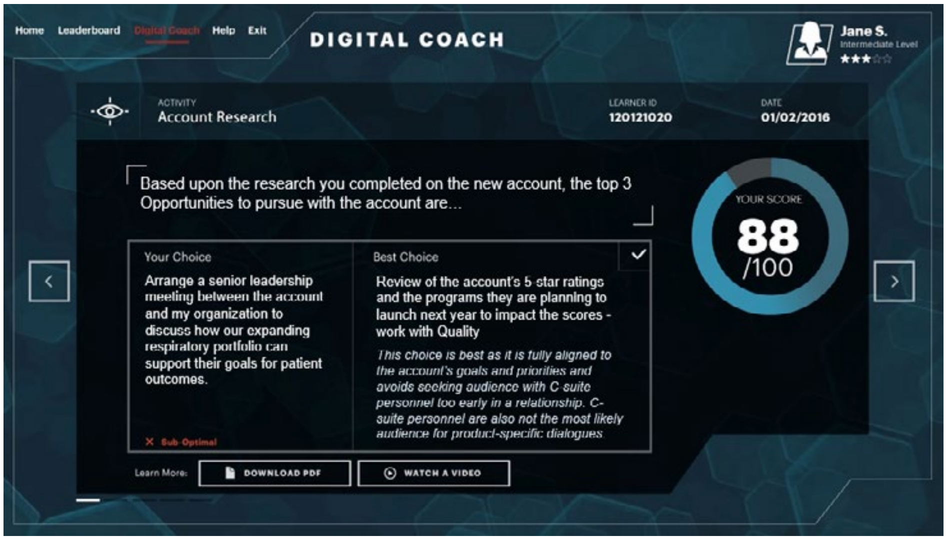
Our culture values scoring, competing with others, and always progressing. These traits in particular define American culture. Changing how assessments and simulations are positioned and perceived in some ways requires us to undo our fundamental and ingrained values. We value As, fear Ds and Fs, and hope we're never an average C. We value being in the "green", ever avoiding yellows and reds. We check to make sure even if we're good, we're also better than the next one out there. We're rarely at peace with what we've achieved — "enough" remains an upward, moving target in our lives.

As we implement our assessment and simulation programs, how can we create a new world where we're measured on a more relational scale, for instance, a purple, teal, and mauve scale that replaces dimensions of "good and bad" with dimensions of being adaptable? We have the opportunity to create a new paradigm for evaluation, one that is focused on generating a future world.

Case in Point:

With a B2B healthcare client, it became important to understand which departments needed which kind of training and development support, so that efforts could be prioritized and staged. However, given recent company layoffs, doing a traditional assessment was likely going to stir up fear. We worked with the client to position the assessment as a development survey and we designed questions that explored attitudes and practices people did in the last few months, versus focusing on knowledge or absolutes. We made sure individual data remained confidential and only aggregate reports were generated for senior leadership. Scoring was done, but we used less judgmental categories such as "strength to leverage", "further exploration" and "area of focus".

When getting their results, learners were also able to immediately download a results interpretation guide and development planner, written in a thoughtful and empathetic tone. In the guide were direct links to specific areas in an online resources center, leading them to learning tools based on that specific skill area for development. The next phase of the marketing program is focusing on generating knowledge and ways of working (versus "teaching" the right way) using an expert-facilitated online discussion forum with leaders and peers. This approach allows the marketers to be part of shaping their future marketing work while deepening their intrinsic relationship to important concepts and practices. We've applied this approach — feedback with access to resources and/or a digital coach — and it has been well received in the sales and account management environments as well.



A Way Forward

In a profit-driven world, performance matters…but people matter more. The day-to-day realities of our employees must accompany the intent and goals of our business programs. Our people and their work constitute what happens in our company. We and our work constitute what happens in our company. We are the "they".

In designing and implementing assessments and simulation programs, let's first engage with the elephants in the room. See what they have to say. There are example questions below to get the conversation started.

Elephant 1: What Are We Actually Doing Here?

- [ ] What is our business challenge? What are we trying to solve for? (Tip: You can't use 'assessment' or 'simulation' in your answer!)
- [ ] What are we trying to learn, decide, or achieve?
- [ ] What are the key knowledge, beliefs and tasks that are essential to business success for the situation at hand?

Based on these answers above, what tactics might be most successful? (This is where the exploration of assessments and simulations would come in.)

Elephant 2: Is There Even a Truth Out There That Can Be Measured?

- [ ] Before we determine if we can measure it, what is our hypothesis as to what makes for success? What is variable? What don't we know for sure?
- [ ] What are the key, few things we need to evaluate?
- [ ] How useful are more traditional measures at helping us evaluate results, and what might be other, creative ways we can get at measuring more subjective attributes?
- [ ] How can we get richer data to help guide our efforts?

Elephant 3: No One Likes to Be Evaluated!

- [ ] How would I feel if I had to do this or take this? Am I willing to do it along with the others?
- [ ] What is the opportunity we have with our learners to have them help us generate the future answer? (Tip: This is more than 'getting feedback from our stakeholders'.)
- [ ] What could be the unintended consequences of how we implement our program? How can we be more human and empathetic about what we are asking our people to do?

There is tremendous white space for change and innovation and to birth a new way of engaging and improving people and the work they do. How can you be part of advancing how we grow and develop our people and our business?