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The Self-Assessment Process

The self-assessment method presented here is a systematic process designed to generate the type of accurate self-awareness needed to make rational job and career decisions. This approach is similar to that used by many professional career management consultants, with one important exception. The process described here is not just a human assessment process, it is a self-assessment process. You will not only acquire skills in assessing other people for career decision-making purposes, you will learn how to assess yourself.

Our underlying philosophy here is that with some guidance and understanding of the process, any careful and thoughtful person can generate personal information, assess its usefulness, and draw conclusions from it that will be helpful, even extremely helpful, in making career-related decisions. Professional counselors could no doubt interpret any single instrument with a greater degree of skill than we will develop here, and if you have access to them, we encourage you to seek their assistance. *You,* however, will be making the decisions and living with them. We believe that since the consequences of your decisions will affect you, you should maintain the primary responsibility for generating, evaluating, and using the data that affect those decisions. Hence, our focus on *self*-assessment.

We realize that your lack of professional training in career counseling and your own biases and preconceptions about who you are may leave you uneasy as you contemplate a self-assessment process. We have taken these things into account and have provided ways of compensating. First, we will explain in nontechnical terms the strengths and weaknesses of the process and the instruments we will use so that you can make an informed and conservative use of the data. Second, we will provide a way of allowing for the impact of your preconceptions. Third, we will use a variety of instruments so that we will not have to rely on any single data-generating device, but rather will be able to take a view that is multifaceted and therefore less susceptible to distortion.

We also expect that you may become impatient with this process. In our graduate program, we spend a full semester working through this book. Our experience has been that at first the data-generation process seems disjointed and unconnected. Do not let that disturb you. Before long it will begin to come together, and you will understand more clearly what is happening. It *is* a rigorous process, though, so you should be committed to following through. You can learn something by doing bits and pieces of the self-assessment, but the real strength of the process lies in the integration of the various exercises we will ask you to do. We promise you, as did some of *our* students in the introduction, that it will be worth your time and effort.

The Basic Approach

We will utilize a five-step approach to each of the exercises in the self-assessment process. As you go through the first part of this book, you will be repeating the following cycle a number of times:

1. First, you will use some data-generating device.
2. Then you will be asked to record your reactions to the exercise in a Feelings Record or journal.
3. You next will read the chapter that explains how to score and interpret the scores from that device.
4. You will then practice interpreting the data supplied by that instrument, using data from one or more cases.
5. Finally, you will do an initial interpretation of your own data.

The fourth step in the cycle is particularly important. Developing your skills at assessment requires practice. The case material in the first part of the book is carefully chosen with that requirement in mind.

Generating Useful Data

Rational assessment, of necessity, begins by generating or gathering information. This book contains and describes a number of different mechanisms that can elicit potentially useful information about a person. These include devices we have created for use here, as well as some standard psychological instruments. None of these methods alone can come close to capturing all there is to know about a person. But as a group they will provide a rich and diverse pool of data tailored for our purposes.

Throughout the first stages of the self-assessment process, you will be asked to use the devices in the book to generate useful data about yourself. Most of these exercises will require only thirty to sixty minutes of your time. (One exception is the written interview, which will require considerably more time and effort, and which we will explain later.) You will probably find some of the exercises fun, or at least interesting. And you will probably find some of the exercises boring, or anxiety-producing. These feelings can be useful data too, and we will ask you to record them as well.

One of the reasons people often feel anxious while using these devices is because they assume these mechanisms are evaluating them. They consciously, or more often unconsciously, believe that the devices will tell them if they are "dumb" or "smart," whether they have any chance at all of becoming a CPA, or whether or not they are "sane." As a result, they approach these devices with ambivalence, and they find using them to be somewhat anxiety-producing.

It is very important for you to recognize at the outset that these data-generating mechanisms *do not analyze you.* They do not tell you what you can or can-

not do with your life or how good a person you are. All they do is supply potentially relevant information that *you* can use to create a self-assessment, which then can help you make better job- and career-related decisions. *You* have to make sense out of the information. *You* have to do the analysis. *You* are in charge. That's what self-assessment is all about.

Recording Your Feelings

Despite what we have just said, you will no doubt have a variety of emotional reactions to the various instruments in the self-assessment process. These reactions will be in large part due to the nature of the instrument, but other things will affect your feelings as well. The way the instrument is introduced to you, your physical and emotional state when you receive the instrument, what you were doing before you received it, interruptions while you are taking the test, and many other factors will influence your response to each instrument.

A careful recording of your reactions to each device can help in several ways. First, since each of the instruments is different in some way, a Feelings Record will help you to analyze your responses to different kinds of situations. This will help you anticipate your responses to similar situations on the job. Second, since there are so many different factors that influence your reaction to any particular data-generating device, a record of the most salient will help you to sort out any distortions you feel have occurred in your test results. Finally, since you will be doing the analysis and will draw conclusions based only on data in which *you* have confidence, a detailed Feelings Record can help you to calibrate the validity a particular set of test data has for you. Your notes will remind you of your concerns about an instrument and to put its results in a reasonable perspective.

Understanding the Data-Generating Devices

In order to utilize the information supplied by any data-generating device, it is crucial that you understand the strengths and weaknesses of the device. Your data are only as good as the instrument used to generate them. The *kind* of information, the *accuracy* of the information, and the *use* of the information will all be affected by the nature of the instrument.

We have provided chapters that will give you some insight into the instruments we will be using.

These chapters are not designed to make you an expert in measuring techniques; instead, they are designed to provide you with enough information so that you can reasonably and intelligently interpret the output of those devices. Remember, *do not read these chapters before you have completed the test or exercise associated with them.* If you do, your responses may be distorted by your knowledge of the scoring system and your beliefs about what constitutes a "desirable," "right," or "socially acceptable" response.

Practicing Interpretation

Once you have taken a test or exercise and read the note accompanying it, you will be asked to practice interpreting someone else's data—in most instances a case included in the book. This will give you a chance to develop some skill in using each set of data before you begin working on your own.

Our approach is fundamentally a process of inductive logic. That is, it starts by focusing on specifics (data generated by the various devices) and from that slowly develops generalizations (themes). This is in contrast to a deductive process, in which we would begin with a set of generalizations (a model) about the behavior of all human beings, and then use them to generate more specific generalizations about a specific person. (For example, if a model says that "all people with red hair are temperamental" and Joe has red hair, we would *deduce* that Joe is temperamental.[1])

This inductive process of thematic analysis is, in a sense, systematic detective work. It involves sifting through large amounts of information looking for clues (to potential themes), drawing tentative conclusions (about what the themes might be), and then testing those conclusions against still more data. And like detective work, it can be fun.

When you make observations from another person's data (the cases), strive to be conservative and to keep your inferences closely connected to the data. It is easy to let your own values, beliefs, habits,

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[1] It would be nice if we could use a deductive approach to self-assessment, particularly because most of us have been educated more in deduction than induction. Unfortunately, however, we cannot. There exists today no single model of human behavior that is of the quality necessary for our purposes. The very best psychological or behavioral models are very limited in their scope and applicability. The behavioral sciences might some day create a truly general-purpose model of human behavior, but it most certainly does not exist now. An alternative method that would still allow deduction would be to study *all* the current models of human behavior and how and when each can be useful. But that is a task far beyond our scope here.

and views of the world color what we might say about another person—and what we might conclude about ourselves. One of the major objectives of the "practicing interpretation" step is to develop skill in drawing simple, conservative inferences from the data. We will have more to say about this later on, but be sure to keep it in mind as you begin.

You might ask: "How do I go about generating conservative inferences?" Generally, you will be asked to do two things. First, you will be asked to *observe* and *cite* a specific bit of evidence (a score on a test, for example) and then to draw an *inference* about what that datum might mean. These inferences are very simple, tentative statements, closely connected to the datum, that attempt to clarify the meaning of the datum. The note that accompanies each instrument will help you make these observations and inferences.

We also encourage you to think carefully about the strengths and weaknesses of each data-generating device. Ask yourself what kind of data it is producing. How accurate is it? To what kinds of distortions is it susceptible? What does it add to what I already know (or suspect about myself?) How might I use the data in conjunction with the other data I have generated? The answers to these questions will help you put the data you generate from each instrument into perspective.

If you are working through the self-assessment process alone, we encourage you to work through the case too. Somehow it is much easier to be "objective" about someone else's data than it is about your own. We would also encourage you in your discussions with friends or spouses or counselors to seek feedback that will add to and complement your conclusions rather than that which will only confirm your views of yourself.

Interpreting Your Own Data

Now, once you have generated some data, read the note, and practiced interpreting a case, you will be asked to begin drawing inferences from your own data. Again, the principles of conservatism, tentativeness, and careful, logical connection should hold. Do not be concerned about drawing sweeping generalizations early in the process. The broader conclusions will come later. This we call "identifying themes."

Identifying Themes

Gradually, as you generate and sift through more and more data, you will begin to see inferences that

recur or bits of data that seem to be connected in some way. These connections may be reflections of central themes that are characteristic of your life.

Keep in mind that our purpose is to use a self-assessment as an aid in making career and job decisions. That is, we seek to create a product that can help to discriminate among a set of potential or real career- and job-related options. We need something that can be used to help "predict" what might happen if a person chooses one career or job option over another: Will the individual be happier with job 1 or job 2? Will she be promoted faster at company A or company B? Will he be more likely to succeed with option 1 or option 2? Will she feel more family/job conflicts with offers 1, 2, or 3?

A self-assessment that can help answer these questions must focus on a person's central and stable characteristics. An assessment which says that an individual likes X, or tends to behave like Y, is not very useful if both X and Y can change within a month. Although human beings do change rather drastically in some ways in a short period of time, all people tend to change slowly or not at all in other ways. It is this latter set of characteristics that one searches for in the data.

To get at these more stable, central, and important aspects of a person that in daily conversation we often call "interests," "values," "skills," or "motives," we will be helping you develop skills at thematic analysis. In this type of analysis, we sort through data and inferences from the various devices looking for recurring ideas (themes). The underlying logic is straightforward and compelling: If evidence pointing to a particular theme ("likes to be in charge," for instance) is found a significant number of times in data generated from numerous devices, then it is probably justifiable to conclude that the evidence is saying something important about the person. With the systematic use of this type of analysis, you can find most of the important themes in your life and be well on your way toward a sound self-assessment.

Identifying Implications

The final step in the process is to identify the basic job, career, and life style implications of the themes you have located. This step involves translating that which you have found in the data into a form and format that is not only accurate, but easy to use in job or career decision making. We will help you as you make that translation.

Some Caveats

The process we will repeat with each instrument is outlined in Exhibit 2-1. The self-assessment checklist included at the end of this chapter is provided as a guideline to help you follow the procedure and track your progress.

Human beings are incredibly complex. You could spend your entire life learning about yourself. With varying degrees of awareness, you probably will. To undertake a self-assessment like the one presented here is an opportunity to learn a great deal about yourself in a relatively short time, and in a structured and carefully guided way. It requires a significant commitment of time and energy. Perhaps at no other time in your life will you take or make the opportunity to do what you are about to do. But there are some things you should think about before beginning.

Learning self-assessment is as intellectually demanding as learning marketing, or finance, or art history. But unlike most other subjects, self-

Exhibit 2-1

The Self-Assessment Process

1. Complete the test or instrument without understanding its intent or objectives so as not to bias or distort your responses.
2. Record your reactions in your Feelings Record. How did you *feel* about taking the test? Where and when did you take it? How did that influence your results?
3. Read the accompanying note. Find out as much as you can about the instrument. How was it constructed? What is it trying to measure? How are the responses scored? What are the instrument's strengths and weaknesses?
4. Practice interpreting a sample case. Note a piece of data (a score, for example) and then draw a *simple, conservative, tentative, and logically connected* inference from it. "This is a person who. . ." may help you get started.
5. Interpret your own data using the principles and skills developed in item 4.

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6. Use all the data (including your Feelings Record and your inferences) to *inductively* identify themes that run through the data.
7. Develop a set of *implications* for job- and career-related decisions.

assessment can also be *emotionally demanding.* It is useful to recognize this aspect of the process from the beginning. It is relatively easy to be objective and calm when we are asked to evaluate someone else's strengths and weaknesses. Assessing ourselves is quite a different matter. Virtually everyone finds engaging in self-assessment difficult. It is only natural to worry about how the assessment will turn out. It is normal to find yourself occasionally angry about one of the data-generating devices or cases. It is also common for people sometimes to see nothing but "good" or nothing but "bad" things in their data, and to feel either very high or very low. That is just the way we are. Again, we encourage you to resist the evaluative posture and to adopt a descriptive one. Do not allow yourself to be always judging. Rather, *describe* and then use that description to make decisions.

Second, self-assessment can be very time-consuming. Sometimes, anxiety pushes people to spend inordinate amounts of time in the pursuit of the "final answer" or of every nuance in the "full story" of their lives. No known process can do that for you. You will not be able to "know all" as a result of this experience. Consequently, we urge you to think carefully about your schedule, your other responsibilities, and your self-discipline as you approach this process. Plan to spend enough time to allow you to work through the exercises, but also discipline yourself to say "Enough is enough." At every step, we will suggest assignments and activities to guide you through the process. These will generate enough data and enough skill in using the data to develop a personal profile that will identify most of the relevant themes in your life. You may feel compelled to go further. We caution: Be reasonable.

You should also know that there are no magic answers to the career-related questions that face you. We offer no crystal balls or predictions about "the perfect job" for you. We do offer a time-tested approach to generating and using extremely useful career data. But you must do the analysis. Do not expect miracles; expect instead an intense and very rewarding exercise in learning or articulating or confirming some important things about you.

This course is also not therapy. You should not consider the book or the process outlined in it to be a substitute for professional counseling. If it is feasible, we encourage you to take the course under the guidance of a trained faculty or in conjunction with other forms of career counseling. If you feel a need for in-depth, personal counseling, seek it. This book will not replace the benefits of that kind of assistance.

Consider these caveats carefully. Remember too, that as of December 1990, more than 2,500 of our students and hundreds of students in other settings have successfully carried out this self-assessment process and have utilized it productively. Seldom has anyone found the process too demanding emotionally. Most have felt that the process, though intense and demanding, yielded extremely useful information about themselves, about jobs in business management, about making career-related decisions, and about the impact of those decisions on their lives and on the organizations for which they work.

First Assignment

With this background, we hope you are eager to proceed. If so, we would like to introduce you to the data-generation part of the self-assessment process by asking you to read the case material that follows. The Dan and Mandy case which follows will help you to think about the *kinds* of information you will want to generate in your self-assessment process. As you read, ask yourself the following questions, and then note your answers on a piece of paper:

1. What decisions do Dan and Mandy need to make?
2. What *kinds* of information do Dan and Mandy need in order to make their decisions? (Consider not only data relating to them as individuals and as a couple, but also to the specific options they face.)
3. Assuming that Dan and Mandy have been able to collect the information you identified in question 2, *how* should they make their decision(s)? What *process* should they use to decide?

DAN AND MANDY

Dan and Mandy were second-year students at the Harvard Business School. On April 15 they were sitting in Mandy's living room discussing the decisions that were facing them. They had met in the first year of the MBA program and in the fall of the second year had become engaged to be married. They faced several different career and life style options and were wrestling with the choices they had to make.

Dan's Background

Dan was raised in an upper middle-class suburb of Philadelphia. His father had an M.D. and was a teaching doctor at a prestigious university. His mother had earned a Ph.D. in Social Research. Dan was the middle child of three boys. He had attended an exclusive boys' prep school from the third grade through his high school graduation and gone on to Harvard College, taking a year off to "find himself" while working off and on as a short order cook. Dan worked for several years as a teacher of Transcendental Meditation, most recently to professional sports teams. After an attempt to write a book, Dan had decided to attend the Harvard Business School to gain more professional business education and to broaden his skills. He was 31 when he was graduated.

Dan's Options

In April, Dan had several job options.

NON-PROFIT DATA SERVICES: NPDS, a relatively new Boston firm engaged in fundraising for non-profit organizations and direct mail marketing for private sector companies, had offered Dan the position of Marketing Manager for Sports. Dan's responsibilities would be to work with professional sports organizations to develop computer-assisted means of generating income from alternatives to paid gate attendance at sporting events.

ATLANTIC ASSOCIATES: The AA offer was in Washington, D.C., where Dan would be working with public sector clients as a salesman and trainer/consultant. Dan expected that he would be traveling to visit clients at least two or three days out of every week.

NEW ENGLAND CONSULTING: NEC offered Dan a position in Boston in their Organizational Development and Executive Education group. Dan was to be a consultant, traveling about 50% of the time.

EXECUTIVE EDUCATION: Dan had also received an offer from another business school to be an assistant program manager for a series of executive education courses conducted by the University. Implicit in the offer was the understanding that after six months to a year of experience Dan would be made the Program Manager. It was also understood that the job would probably not extend beyond five years. The school was located within an hour's drive of Boston.

A MAJOR BROADCASTING COMPANY: One of the major TV-radio networks had offered Dan his choice of two positions, one in sales and one in advertising and promotion, both located in New York. The jobs held the promise of a possible move into sports in the future.

SOLAR ENERGY CORPORATION: Dan's last offer came from SEC. The firm was young, comprised of engineers working on problems associated with the large-scale generation of solar produced electrical energy. The small firm wanted Dan to be its Business Manager. The firm was located in a rural setting west of Boston.

Mandy's Background

Mandy was born and raised an only child in a blue collar neighborhood "15 miles geographically but 850 million light years culturally" removed from New York City. Mandy's parents both worked in public education—her father as an administrator and her mother as a teacher. After she graduated from high school, Mandy went to Barnard College and in her second year married her high school boyfriend. After giving birth to two children, Mandy was divorced from her hus-

band and left school to work on Wall Street for a well-known stockbroker. She rose very quickly in the organization and received large salary increases beyond her expectations. Working at night, she finally completed her undergraduate degree when she was 28. Then, with the financial support of the company, she applied to the Harvard Business School and was admitted.

Mandy's Options

Having met Dan and become engaged, Mandy faced several career options as well.

WALL STREET: Mandy's first option was to return to the Wall Street firm where she had been employed before coming to the MBA program at a greatly increased salary but to work for the same supervisor she had had when she left.

HOUSEWIFE AND MOTHER: Alternately, Mandy could stay at home while Dan worked and attend to raising her two daughters and to managing the household affairs. This alternative would provide her children with a "traditional home life" that they had not yet experienced.

UNIVERSITY ADMINISTRATION: Mandy also had received an offer to work as an Assistant Director of Admissions at a Boston university, a position that would include the supervision of the processing of thousands of applications on an annual basis.

Additional Issues and Concerns

In the midst of their career decision making, Dan and Mandy also faced some other major questions.

MARRIAGE: Dan and Mandy had set May 30 as the date for their wedding. Aside from the significant time and energy required to plan the event, they were thinking about adjusting to their new life style—indeed, about *shaping* it. Questions about family finances, education for the two children, friendship networks, commuting and travel time, recreation, and others bubbled up frequently in their conversations.

HOUSING: Since at the outset their marriage would involve four people, they had thought seriously about purchasing a home. Interest rates at the time were rising, and it seemed economically wise to invest in a house as soon as possible. Mandy, given her background, had had a childhood dream of living in a well-groomed, suburban neighborhood. An opportunity had arisen in a community 30 minutes west of Boston to purchase a home which seemed to meet both of their life style interests, and in fact, they had signed a purchase and sale agreement with a probable closing date of May 30. The house had over an acre of land and was set in a thickly wooded area.

The home was 10 minutes from SEC's offices and about 45 minutes each from Atlantic Associates and Dan's Executive Education offer. It took an hour to reach Boston's Logan Airport.

Making Their Decisions

As Mandy and Dan talked, the options that faced them raised a complex set of decisions that had to be made. They wrestled with their decision to purchase the house, with which of the job opportunities would make the most sense as a family, and with the kind of life style that they would like to forge out of their new marriage, their new family, and their new career opportunities.