

CCH-JOURNAL, CPA Practice Management Forum, July 2008, **Improving Your Team Productivity Through Psychological Testing**  
**Improving Your Team Productivity Through Psychological Testing**

*By Sandra Wiley*

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What if you had a tool at your fingertips that is statistically proven to help build successful teams, hire individuals that fit a firm's culture, develop leaders for the future, motivate and retain current staff as well as resolve conflict? Most would jump at the chance to use it in their firms. Want to know more? Read on!

The Kolbe Wisdom(tm), a psychological system developed by well-known theorist Kathy Kolbe, emerged from her scientific studies (begun in 1970) of learning differences among people. In the 1980s, Kolbe used what she discovered from her research to advise such business giants as Kodak, IBM, Xerox and Alaska Airlines. The underlying premise of Kolbe's work is that people who work according to their instincts accomplish more. Those who fight or work against their instincts suffer stress (the most common workplace malady) and often fail to reach peak performance. Developed nearly 30 years ago, this system has been proven 96 percent accurate in test-retest reliability.

The Kolbe system maintains that creative instincts drive people to take specific actions. This mental drive is separate and distinct from passive feelings and thoughts. Creative instincts are manifested in an innate pattern that determines one's unique method of operation. We see these instinctive actions at work everyday within our firms. Because they function at the subconscious level, however, we sometimes don't recognize them when evaluating someone's performance.

**Kolbe System Tools**

|                    |                                                                                                                                           |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Kolbe A            | Reflects individual instinctive traits                                                                                                    |
| Kolbe B            | Reflects the individuals view of instinctive traits that are needed and expected in their current job responsibilities                    |
| Kolbe C            | Reflects the supervisors view of the instinctive traits that are needed and expected in the position being evaluated                      |
| Kolbe Team Reports | Team reports are developed from the Kolbe A, B and C reports to show the viability and potential productivity of the team being evaluated |

Instinctive behavioral patterns govern the actions, reactions and interactions of each individual. They also determine how an individual will use his or her time and communicate. Understanding and exercising control over these instincts offers one the freedom to be functionally authentic in his or her job role.

The accounting industry is struggling with identifying, retaining and motivating employees. Kolbe's tools are built to confront these exact challenges. But why is a tool used successfully in many other industries just now finding its way to ours? The answer is simple: we in the accounting industry are often late adopters because we want to know *exactly* what we are getting into before we jump!

## Changing how we think

Most of us don't understand our instincts. We don't learn about them in school, and they are often overlooked by human resource professionals during job interviews. A thorough exploration of all three parts of the mind is critical when we select, retain, coach and build teams within our firms. These are:

**Cognitive (Thinking)** —When we examine a resume or identify someone's skills for a certain job, we note the cognitive skills of that person. This part of the mind has been “fed” in classrooms and by life experiences.

**Affective (Feeling)** —The values and beliefs that drive a person's feelings and motivation are what make up his or her affective behaviors. These are often identified by good interview questions, or tests such as the Meyers Briggs ([www.meyersbriggs.com](http://www.meyersbriggs.com)) or Predictive Index ([www.piworldwide.com](http://www.piworldwide.com)).

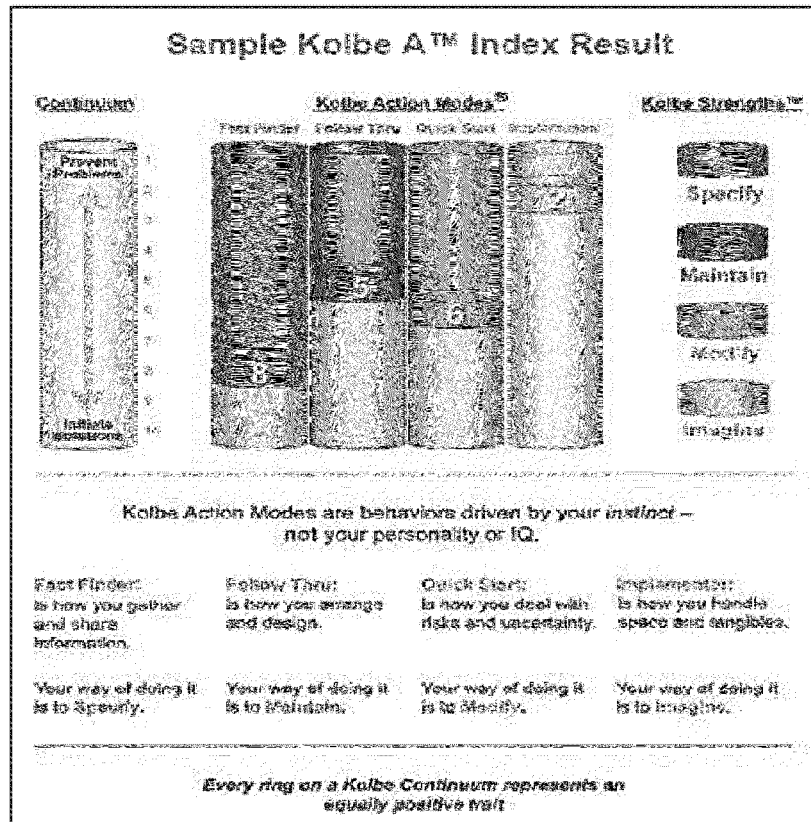
**Conative (Doing)** —The energy we expend when doing work according to our instincts is conative. In its simplest form, conation is purposeful intention to act —the innate mode in which one strives toward a goal using his or her intrinsic “knack” for getting things done. This may sound foreign, but that is exactly why it is so important. It is the missing link to peak performance.

## Conative instincts the core of the Kolbe system

You may be thinking that since you only took one psychology class, the concept of conation will never make sense. Well, let me assure you that the Kolbe system is simple to administer, and its results are easy to track and understand. It identifies four areas of instinct:

- The “Fact Finder” instinct reveals a need to conduct in-depth investigation.
- The “Follow Thru” instinct compels us to seek a sense of order or structure.
- The “Quick Start” instinct is the force behind experimentation.
- The “Implementor” instinct takes ideas and makes them real.

The graph below depicts the four action modes measured by the Kolbe system:



Additionally, the first page of the Kolbe Index of this article's author is below:



## Kolbe A™ Index Result

Sandra Wiley

# CONGRATULATIONS

## Sandra

Your Kolbe A™ Index result shows you are terrific with future-oriented challenges and dealing with the essential facts — you don't get bogged down with detailed information. You'll say "Yes" before you even know the end of the question — then turn it into a productive adventure.

Welcome to a journey of discovery into the Kolbe Wisdom, where equality has been proven, your personal creative abilities are celebrated, and teams work with a predictable level of quantifiable synergy. It's the wisdom of the ages combined with modern technology, revealing hidden truths about the three-dimensional mind and the significance of conation, your willful determination to act on instinct.

### Kolbe Action Modes™

| Fast Follower | Follow Thru | Quick Start | Implementer |
|---------------|-------------|-------------|-------------|
| 3             | 4           | 5           | 6           |

Your Kolbe result is so individualized, only 5% of the population is likely to have one just like it

Kolbe A Result (5 4 8 3) - experience it online with audio at <http://www.kolbe.com/kolbereports/>  
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While every person has some degree of instinct in all four areas, one predominate style of action is always present. No style is wrong —the important thing is to help people work according to their instincts. The more someone works this way, the happier that person will be —resulting in higher productivity and desire to stay with the firm. A happy, productive staff member who enjoys working for your firm —sounds pretty good doesn't it?

Suppose you have a new staff accountant hired for the tax area. The department supervisor (Kolbe profile 9-8-1-3) has always followed a tried and true process. His profile reveals a strong inclination to conduct in-depth research, devise a plan and stick with it. There is certainly nothing wrong with that, but the new staff accountant has a very different Kolbe profile (5-8-8-2). She prefers to review and edit details, create processes and look for new solutions. Her work style should bring a new facet to the team in the tax department. However, if the supervisor is not privy to her Kolbe profile, he will expect her to act in the same way he does. When she doesn't, he will be disappointed, she will be discouraged, and the likelihood of success will diminish.

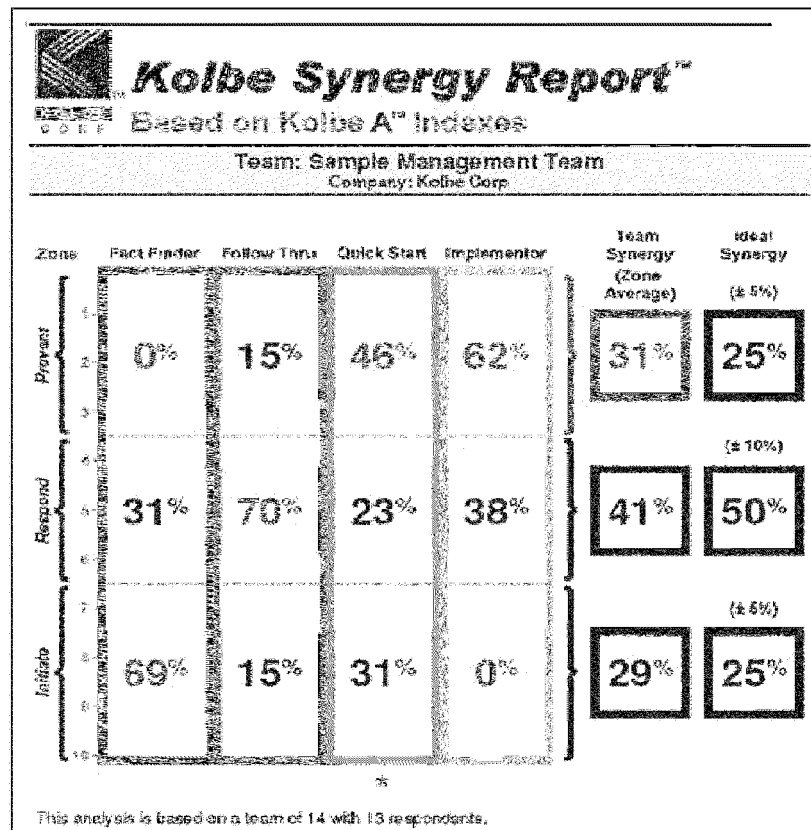
## Hiring the best and getting them in the right seats on the bus

Yes —your firm is like a bus! It is difficult to locate good candidates, and the hiring process requires a significant investment. Discovering later that a new hire doesn't fit and must be let go wastes time, money and resources. The Kolbe hiring process has an 82-percent success rate in getting the right person for the right job.

What about current staff? Many are working out well, but others just don't seem to “get it,” and you're not sure what to do with them. Kolbe ensures each employee is working in the most effective, satisfying and productive ways.

## Predict individual and team performance

The Kolbe system also takes individual results and melds them into reports that predict team viability and long-term success. Identifying those willing and able to work as a unified team is critical to a firm's future. Consider a firm that has assigned committees to drive tax, audit, marketing and executive initiatives. If these groups are comprised entirely of “Fact Finders,” you may well end up with “analysis paralysis.” A team that complements one another *via* Kolbe measurements adds diversity, moves projects forward and fosters enhanced productivity. “Synergy” refers to the results of Kolbe's team-building initiatives. A sample of this report is shown on this page.



## Motivate and retain

We often associate motivation with benefits such as massages, flex time and PTO. While these perks can

be somewhat helpful, the best method to motivate and ultimately retain staff members is to help them work in instinctual, satisfying ways. Kolbe profiles offer compelling insights that heighten self-awareness and motivate individuals to work within their unique styles.

Consider how you like to work. Do you dig into the details of a project and find all the answers before you make a decision? Are you someone who likes to work in chaos and generate new ideas and products? What if you could work exactly the way you feel most comfortable most of the time? Working within your instinctive behaviors is far more sustainable—and fulfilling—than “manufactured” motivation brought on by short-term benefits.

## **Develop leaders for the future**

While succession planning is on almost every firm's list, motivating and developing up-and-coming stars is not as easy as it was in the past. In order to secure a firm's future, emerging leaders must understand their unique strengths and how to capitalize on them. Second, they must know how to develop a team to implement their ideas and carry out the firm's vision.

Kolbe profiles can accurately predict how someone will lead. One profile may be more suitable for one leadership role over another, depending on the makeup of the firm and where it is headed in the future.

## **Resolve conflict**

Conflict can be healthy if handled in an environment that fosters open communication. Kolbe's “Conflict Counteractives” identifies the root issues in a conflict and offers resolution strategies. The counteractive is a positive way to facilitate a difficult process. Each side works together to explore why the conflict is occurring, how it is affecting productivity and how to resolve the situation with mutual respect.

This tool will change your firm's culture. It's not just a feel-good test that sits in a drawer, never to be used for anything purposeful. Rather, it acts to shape your team into a productive powerhouse!