Ashley Moroney

My Experience at OE Strategies

Since the end of January, 2020, I have had the opportunity to intern at OE Strategies, a local I/O consulting company located in Broadview Heights, Ohio. It is a small, 6-person company that has a broad book of business offerings. We work on everything from job analysis to executive coaching, and I have the opportunity to collaborate regularly with two highly experienced consultants on a multitude of projects. I have thoroughly enjoyed my experience there thus far, and I would like to share some of the key projects I have worked on and taken the lead of, as well as what my big takeaways are from the experience. I will be covering these projects in five sections: 360-degree surveying, assessments, job analysis, competency development, and DEI surveys. This will allow you to see both the breadth and depth of my experience and everything that I have learned.

360-Degree Surveying

One of the first projects I was tasked with when starting as an intern was learning about and owning the 360-degree surveying process. 360-degree surveys are a form of assessment that allows participants to select managers, peers, stakeholders, and direct reports as raters, giving the individual a well-rounded picture of how they show up to different people throughout their workday. Our participants come to us in one of two ways: they may be referred by a manager or senior leader for performance management reasons or they may be participating in another development program that we offer. Some companies will run batches of participants at the same time as part of a larger initiative. Many companies will only have one or two people participating at once.

Each company has its own set of competencies with questions associated to help raters answer specific questions about the individual's performance. An example competency is "decision making". OE Strategies also has a master list of competencies that are not company-specific, allowing smaller firms the chance to participate without having to completely develop formal competencies. This also allows OE to flexibly build out a competency profile for those companies who want one developed. At any rate, the actual process of participating in a 360-degree survey looks the same for everyone.

When I receive a name of someone who needs to start the surveying process, I add them to the system and develop a timeline for each stage of the survey. The first step is selecting raters, and that takes about one week. To maintain anonymity, at least three raters for each category (peers, stakeholders, and direct reports) must be providing. If there are less than three, they will not receive results for that category. This ensures the specific answers cannot be linked back to a particular individual. The exception is managers, as they are likely going to be more forthcoming with how they view the participant's performance; manager answers should not come as a surprise so anonymity is not necessary for that category. Once raters are provided, I quality check the names and email addresses. During this time, I also send a sample notification letter to the participant so they can socialize the survey with the people they have chosen. I also provide them with the timeline for the process.

After the quality check is completed, I launch the rater surveying. This stage typically lasts 18-20 days and may sometimes last longer, depending on how responsive raters are. The participant is also expected to provide a self-assessment during this time to allow for comparison to the results. Once this stage is complete, I generate a report with the results and schedule a debrief webinar with the participant and their manager. The webinar is typically 30 minutes long, allowing us to give a brief tutorial on the report and set the participant up for action planning.

To help participants understand their results, we use a framework known as a Johari window. This divides competencies into quadrants: Q1 is “known to self and others”, Q2 is “not known to self but known to others”, Q3 is “known to self but not known to others”, and Q4 is “not known to self or others”. Q2 is typically an area of focus, as this is a blind spot. The largest benefit of using a 360-degree survey for participants is that they can more easily identify the blind spots in their performance as well as their unrecognized strengths. This is key, as the next stage of the assessment is action planning.

Action planning is arguably the most important part of this process, as it allows participants to take a hard look at their results and determine what areas need the most attention. Some people feel they should focus more on blind spots, while others are at a point where they can sharpen some of their strengths. At any rate, we give participants nine months to complete this stage. During the debrief session, participants will be introduced to the action planning website. This website allows them to access a comprehensive resource library and directly attach specific books, videos, or articles to their plan. We believe SMART goals are a vital step to the development process, so the website also has a complete action planner that ties resources back to goals and ties goals back to their company’s key competency areas.

Once the action planning phase is completed, participants have the opportunity to take a pulse survey. The pulse survey is a mini version of the 360-degree survey, allowing participants to select specific questions and areas of focus from the original survey. They create a customized survey based on the goals they have been working towards and then ask the original raters to reassess them so they can see whether progress has been made. Like the first survey, this process is available for three to four weeks, depending on how responsive raters are. Once completed, an update report is provided to the participants so they can see how they did.

While that is a very task-based description of what I work on with the 360-degree surveys, it is important to note some of the key takeaways I have had from this process. The first is consideration for differing organization levels and their viewpoints. One group that was assessed consisted solely of directors and many of their managers were unresponsive. At first, I thought this was because they were uninterested, but it was actually because of their workload at that time. This proved to be important as I developed a strategic timeline for launching multiple batches of surveying for the same company, targeted for 2021. I made sure to consider the level of the employee slated to start the process and account for any company-wide outages or events that could hinder participation. While everything cannot be anticipated in advance, this was a successful approach and led to OE gaining a guaranteed 80 participants for 2021, as well as some developmental programming that aligns with some of the common themes in the results.

The second big takeaway I have had from this process is comfortability in speaking to different organizational levels, both up and down the chain. I have had the opportunity to give webinars to a variety of different work groups, ranging from local city departments to power companies to non-profits. While the material was the same, my delivery of the material had to be flexible to account for differing levels of interest, time, and personality. For example, I hosted a webinar with a police department and was far more informal than the webinar I hosted with an insurance company. Flexible communication styles are important for creating a personal brand as well as building stronger relationships at work, so I am happy I was able to learn this now.

There are many other, much smaller takeaways I have had from this process. The best way to categorize them is “personal development”. One of my background duties on this project is to continuously update the resource library with new videos, books, and articles. As a result, I have to read a lot of personal development articles and watch a lot of Ted Talks. While the information is not immediately useful, it helps me to have it in the back of my mind. This is especially useful for the next section: Assessments.

Assessments

The bulk of what I do on a regular basis at OE is related to assessments. I excluded 360-degree assessments from this category because they are structured very differently and are far less involved. The assessments I am referring to here are more related to the onboarding and selection process. For ease of discussion, I will keep this limited to one specific assessment process we use as a way to assist clients with hiring and promotion decisions.

To give a brief overview, our selection assessments consist of five phases: phase one is the cognitive assessment, phase two is the personality assessment, phase three is the interview, phase four is the case study, and phase five is the role play. The goal of this assessment is to compare multiple candidates to each other for a specific role. We view each phase as a data point that allows us to see patterns emerge, indicating whether or not someone will be a good fit for the role. While we do not make any specific recommendations on whether someone should be hired, our clients find the reports from this process to be extremely helpful. I will now explain each phase.

Phases one and two are the cognitive and personality assessments. OE uses two cognitive tests: the Watson III 2020 and the Verify numerical reasoning test. The Watson measures critical thinking and decision-making ability, and the Verify specifically assesses numerical reasoning. We also use a Harrison assessment to determine job fit based on personality and work preferences. The coolest thing about the Harrison assessment is that it provides you with paradox graphs that show you how you perform normally, as well as how you are likely to perform under stress. One of my paradox graphs, for example, is analyzing pitfalls. When I am relaxed, I tend to not think of potential problems that could arise. However, when I am stressed, I tend to “flip” and overanalyze. I am working on finding that balance. Finally, we use a Hogan assessment to determine additional personality details that might show up as derailers for someone at work. As an applicant at OE, I had to take these assessments and they are overwhelming, to say the least. However, they are informative to not only the candidate, but also the assessor.

An additional personality assessment we sometimes use is called the Leadership Skills Profile (LSP). This is leaned on pretty heavily, as it shows where leaders tend to fall in terms of their balance between task and interpersonal orientation. One competency measured on the LSP, for example, is short-term planning. Leaders who are highly skilled at this tend to be less skilled at strategic vision planning. We typically see patterns emerge in this assessment after conducting the interviews.

Phase three of the assessment process is the interview. We conduct two interviews, usually broken up by a case study and a role play. The first interview is the standard career information interview, during which we are seeking to understand career motivations and why the candidate is interested in the role. The second interview is more behavioral, targeting leadership behaviors and interpersonal interactions. While both are self-report and subject to the halo effect, it is surprising how often we see glaring patterns in what is said during the interviews and how those things match up to the assessment results. Sometimes, it is a complete lack of self-awareness. For example, one person told us everything she touches turns to gold. However, her coaching role play and case study told us otherwise. Furthermore, her own examples of how she interacts with others seemed to indicate a certain level of social ineptitude. These types of patterns are easy to see throughout this assessment process.

I mentioned the case study and role play: these are phases four and five of the assessment process. The case study is designed to see how well someone can perform in a high-stress situation. We give them several pages of reading material and 30 minutes to prepare a 5-minute presentation that highlights key problems and solutions based on what the material says. This allows us to see the style people default to under pressure. For example, data driven people tend to rely solely on the facts in the materials, failing to consider things like change management and organizational politics. Similarly, emotionally intelligent people tend to leave out data and focus primarily on high-level strategies to promote change. Most people voice that they felt they needed more time.

Interestingly enough, we are rarely told people need more time when it comes to the coaching role play. For this phase, candidates are provided a two-page description of an employee's behavior at work and how it is impacting coworkers. They are tasked with coaching this employee. Candidates are notoriously bad at coaching, so they typically come into the encounter ready to tell the "employee" everything they are doing wrong and how to fix it. This can be comical, especially when they claim to be strong, relational leaders during the interviews. At any rate, it is just another data point, so if someone does especially poorly during any one part of the assessment and does not display the behavior anywhere else, we do not even consider it during the report writing.

My role in the assessment process, in addition to being a second "executive" in the case study presentation and an "employee" in the coaching role play, is to write the reports and create comparison charts between the candidates. Report writing is quite challenging, although now that

I have written a few of them, I am getting better at noticing the patterns of behavior. I typically will observe an assessment for the full duration, taking notes along the way. Afterwards, I review all of cognitive and personality assessment results, as well as the interview, case study, and role play notes. I try to find at least five strengths and five opportunities for each candidate, picking up on key overarching themes. From there, I report on career motivations, work style, strategy and decision-making, interpersonal relationships, and self-development. I provide an integration summary of all strengths and opportunities, and then provide developmental recommendations for the candidate. Once all reports are written, I provide a very brief snapshot of each candidate that is interviewing for a role so hiring managers can quickly do a side-by-side comparison of each area of their performance.

Overall, I think my biggest takeaways from assessments (aside from what I learned during my own personal assessment process) are around pattern recognition and language. I now feel pretty confident in my ability to take information from multiple areas and synthesize it into a concise presentation, as well as draw conclusions based on what I see. Additionally, I have learned how to speak the business language that executives use. This was a learning curve for me, as some of the industries we work with started out very unfamiliar to me. The next section will show how far I have come in that regard.

Job Analysis

At first glance, having a section about job analysis after taking an entire class about job analysis may seem redundant. However, one of my biggest takeaways from this project was how different job analysis can look, depending on what the client needs or hopes to accomplish with the information. The goal of this project was to provide the client with a better understanding of the knowledge and skill gaps that exist in their current Area Vice Presidents (AVPs) so they can develop a stronger succession plan as these people move forward in the company. While this project did have similarities to the Sherwin-Williams project, there were also key differences.

To start, this client was very interested in understanding what sets strong AVPs apart from those who need more development before moving into the Division President role. To understand this, we conducted interviews with subject matter experts, including the VP of HR and current Division Presidents. Similar to the SW project, I was tasked with developing interview questions that would get at the root of how successful Division Presidents think, behave, and plan. Once interviews were conducted, we used the information gained to start planning the assessment stage.

The assessment stage of this job analysis was the main difference from what we did with SW. At this step, I was tasked with developing interview questions, a case study, and a role play for the current AVPs to help us uncover strengths and areas of opportunity for their development. This was extremely challenging, as the case study and role play both had to contain industry-specific information that would be relevant to the types of decisions these leaders would have to make on the job. This required me to learn a lot about industry trends and workplace dynamics in the natural gas industry, as well as important behavioral characteristics and strategic decision-making skills needed to be a strong Division President.

In addition to the case study and role play materials, I was also tasked with developing a competency profile based on information obtained during the SME interviews. I enjoyed this step, as I got to leverage some creative thinking skills as well as the business language skills I have learned through the other assessment processes. At the end, I came up with four competency areas for leaders to develop in.

Once we had the materials assembled, we conducted several assessments similar to those I described in the last section. Much like the other assessments, we provided the HR leader with a report for each participant, as well as a 16-person comparison chart. This comparison chart rated each participant on the four different competency areas and provided a summary of their strengths and areas of opportunity. This comparison chart was a great way for me to see how all the pieces connected, as the clear areas of opportunity really came through in the different competency areas. The client was so happy, they asked us to create a full development program for their leaders to build out stronger succession plans and help them make improvements strategically. The skills I learned when developing these competencies translated to the next big project I worked on.

Competency Questions Development

This project began as my least favorite aspect of my internship. When I was first introduced to this client, my tasks consisted primarily of data cleaning and running reliability analyses on datasets with over 20,000 participants and over 150 variables. It was overwhelmingly boring, to say the least. However, I soon realized the data was a small piece of a much larger project, one of which I am now a key contributor of new ideas.

The purpose of this ongoing project is to review competencies the client is using to assess performance for multiple roles and organizational levels. Part of the review includes running a reliability analysis on each competency scale to ensure items are maintaining their predictive value. With that said, I conducted a reliability analysis in the spring and found a few competency scales that had a reliability of .300 or lower. After a closer look, it seemed like certain questions in the scales were especially unreliable. For example, one question asked how many business books a person reads, hoping that a higher number would indicate a better business acumen. This is not the case. With this in mind, we provided the client with a report of our findings, as well as some recommended changes that were needed.

As it turns out, the client also saw a need to change some of the scale items. In addition to that, she felt it was important to add a new competency scale for diversity and inclusion. In total, we left the meeting with four competency scales to target for redevelopment or creation. I started with the lower hanging fruit, “maintains strategic business perspective”. In order to upgrade this competency scale, I had to review the definition we had in place to ensure there was alignment between what we were trying to predict and the questions we are asking. The definition seemed to align with what one would expect from someone who can maintain a strategic business perspective. With that in mind, I decided it would be best to create some new questions for this scale.

The development process for competency questions requires many of the same skills I learned in the job analysis project. To start, I had to conduct some preliminary research to understand the behaviors needed for a strategic business perspective, as well as decide if there were any valuable existing scales that could be drawn from for materials. Unfortunately, many of the strategy scales I found in empirical studies were outdated and used language that did not make sense for this project. However, I was able to use those questions as inspiration for new questions. Once I developed some new items, I met with my bosses to discuss my findings and sharpen the items to make them more like what the client was expecting. After gathering the ideas, I made some small changes and we presented initial findings to the client.

Our client was happy with this first set of competency questions and wanted us to move forward with the other competencies, so I went ahead and created the diversity and inclusion competency. This particular scale is still under development, but I do want to note that once we receive payment from the client, we will be ready to move into the piloting phase. I am particularly excited about this part because real people will be taking the surveys and helping us understand which items work and which do not work. Being able to conduct this type of real-world, applied analysis is very exciting and interesting to me.

In addition to learning all of the pitfalls and exciting moments of data analysis on a real dataset, I also learned how to communicate with data during this project. Part of the delivery of the results required us to convey a compelling story about why the original items were not great without offending the client, as she was a key contributor to the original item creation. Additionally, she is not versed in data analytics, so communicating the information in a way that was clear to her was an added challenge. That said, I was able to meet this challenge and keep her happy. Communicating with data was not a skill I understood or saw value in much before this project.

DEI Surveys

While this project is one of the most recent projects I have been working on, it is one of the most important projects to me. The owner of OE has given me an excellent opportunity to lead two DEI survey projects simultaneously, and while this has been somewhat overwhelming at times, it has been a tremendous learning experience for me and is highly relevant to my career goals. Both surveys are similar enough in nature, so I will focus on the larger survey for this overview.

The client we are working with on one of the DEI surveys has expressed a larger need for long-term assistance with workplace culture concerns. We started by developing a project timeline as well as some survey items for review. A sample item could be “My leaders value my ideas or opinions”. Ideally, we would pilot the survey items, but one of the things I have learned from this internship is that clients do not always see the value in piloting items first, especially if that costs them money. Therefore, we launched the survey without the pilot once the items were approved. The survey was open for about three weeks, during which we prepared the reporting software to ensure we can deliver results to the client in a timely manner. I provided regular updates on participation while ensuring responses were kept anonymous.

Our goal was to achieve at least 70% of participation from the employees. However, we were not able to get more than 52%. A review of the responses received indicated some widespread, systemic discrimination issues and an overarching feeling of distrust amongst those who responded, so we decided it was not likely going to improve by keeping the survey open for longer. With that in mind, data analysis started.

Part of my tasks with data analysis was, again, cleaning the data. Additionally, I am responsible for providing demographic breakdowns by location, as well as responses by location. I am still in the process of putting this information together, but I expect to also see some clear patterns in the item scores that align with the sentiments in the comments. We plan to deliver results on Monday.

One of the biggest surprises to me, and thus, one of my biggest takeaways from this project is that discrimination is a huge problem in even the most mundane of places. Of course, I know that it is systemic; what I did not realize as much was how overt it can be. Many people were willing to put comments that seem so glaringly inappropriate and yet, they just casually throw it out there. In contrast, it was enlightening to see so many people eager to provide sound, genuine suggestions for improvement and express happiness that the organization cared enough to ask the questions. This organization is a union environment, and I had not previously considered how that might impact different minority groups. Overall, it has been a very eye-opening experience.

Conclusion

While I do feel I have covered a lot of ground in this paper on what I have been working on and what I have learned, I feel like there is so much I have not mentioned. Being a small company, OE provides me with an awesome opportunity to learn a variety of things instead of primarily working on one big project. On any given day, I could be looking at data, helping with an assessment, writing a newsletter article, or creating a powerpoint presentation for a new webinar. This varied, irregular approach to my work has helped me grow in so many ways.

One of my favorite small projects I got to work on involved maintaining a strong relationship with one of our clients. A particular individual at that company works with us frequently and we know him pretty well at this point. He is the type of person who sends you wine baskets on your birthday and negotiates for more business with us whenever he can. He was recently promoted and as a result, acquired a new team of executives reporting to him. We happened to have personality assessments on file for his new team members, so I put together a quick presentation illustrating each team member's strengths and opportunities on a sliding scale. Since this was free and tailored specifically for him, I used tiny pictures of each team member as the marker on the scale. It ended up being pretty funny while also showing him exactly how each person works and how he can flex his style to interact with them individually.

I bring up this project not only because it was fun for me to do, but also because it speaks to the final (and arguably most important) takeaway from this internship experience: people are really the key to success. This might seem obvious, but it was something I needed to learn at this point in my life. When I am learning or focused on a goal, like many of the candidates we assess, I too lean more into task-orientation than people-orientation. This has been beneficial for me in the past, but my technical knowledge can only take me so far if I want to continue to grow and climb organizational ladders. Seeing how important it is to build and maintain relationships with people outside of the immediate need is not something I was skilled at previously and was not something I saw value in. After working at OE, I see the value in offering things for free just to plant the seed in their minds or giving a discount on a project now because that will lead to more projects later. This was not a concept I readily understood and seeing it in action has been tremendously helpful.

Overall, this experience has been a great one and I would happily recommend highly qualified peers to this role. While it has its challenges, I feel it has helped prepare me well for my future roles.