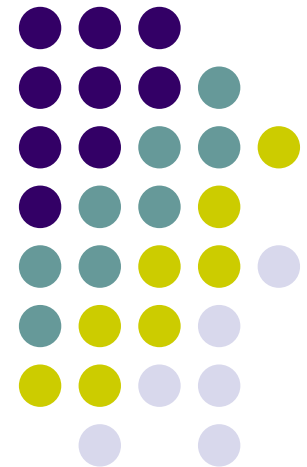


**How Situational Judgement Tests  
(SJT's) and Assessment Centre  
techniques were combined in  
assessing 660 managers countrywide  
within 22 working days**

Pieter Möller  
ACSG  
13 March 2008





# Roadmap

- History of the assessment centre
- Alternatives available
- SJT's
- Inter active exercises
- Final report
- Logistics
- Final impact



# Background

- Started October 2006
- Regional managers to be assessed
- Successful project
- Decision: similar assessment needed for branch managers
- Time restriction

# Statistics



- 660 managers agreed to be assessed
- Result: At least 30 assessments per day
- Branches spread over nine provinces
- Assessment project team consisted of one person
- Non negotiable: we need the same quality results as with Regional Managers



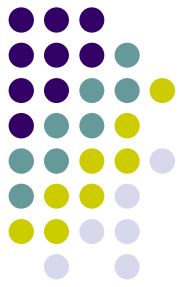
# Available alternatives

- Competency based interviews
- Psychometric testing
- Assessment Centres
- Situational Judgement Tests
- Management opinion

# Reason for the assessments



- Change in the role profile of the branch manager
- Activities much more activity based
- Branch manager to take final responsibility



# Discussion on alternatives

- Principles of assessment centres must be used
- Numbers make it impossible for a formal assessment centre procedure
- Psychometrics not to be used

# Final proposal and decision



- Combination between formal assessment centre interactive exercises and Situational Judgement Tests

# Priorities



- Proper job analysis
- Compile a role profile for the branch manager's position
- Determine the different dimensions
- Proper dimension definitions (Example of WPS)
- Keep all relevant parties informed (total process)



# Non negotiable

- Process must be fair to all
- Minimum grievances
- None or minimum escalated grievances
- Must be acceptable to all diverse groups
- Process must discriminate on proper grounds

# Final proposal



Based on the available time and non negotiable requirements:

- **Combine Situational Judgement Tests with traditional assessment centre principles and exercises**

# Situational Judgement Tests



- Remembered about ACSG two years ago
- Not general knowledge
- Information not freely available
- Got in touch with SA expert
- Bought book

# What is Situational Judgement Tests?



- Simulation or work sample to assess preferences for appropriate behaviours in a work situation
- Situations or representations of common problems or challenges that might arise within a specific type of job
- Potential responses to these problems are in multiple-choice format

# Themes in SJT's



- Leadership
- Business acumen
- Customer orientation
- Valuing diversity

# Themes in SJT's (continued)



- **Leadership**

The ability to pro actively lead the branch environment to achieve a level of pre eminence in the retail business performance

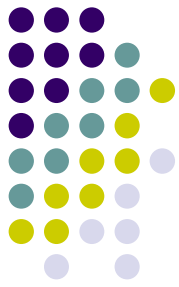
**Drivers:**

# Themes of the SJT's (continued)



- **Business Acumen**
- To demonstrate the ability to identify opportunities for business growth
  - Drivers
    - People insight
    - Commercial awareness
    - Risk taking
    - Sustainable energy

# Themes in SJT's (continued)



- **Customer orientation**
- The ability to create, through people, pre-eminent service culture and climate for excellent customer service in an ABSA branch environment where all stakeholder service needs are exceeded
  - **Drivers**

# Themes in SJT's (continued)



- Valuing Diversity
- Recognise as a partner and change agent for transformation in Absa by embracing diversity, understanding the political awareness and be fair and consistent in dealing with all stakeholders by showing respect and appreciation. Will be seen as adaptable to the changes in the political environment

# SJT's Examples



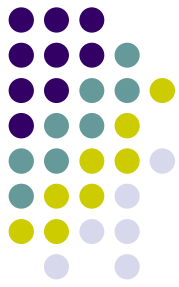
- **Leadership**

- **On a daily basis you as branch manager receive numerous request and instructions to be dealt with urgently. These requests and instruction are received from immediate supervisor, regional office, operations, cash centre, forensics, head office, staff and clients via telephone, e-mail or direct. These requests and instructions are either important or urgent or both. These instructions and requests are sometimes experienced as unfair or unreasonable i.e. a request reaches you by 14:00 and the response to be made available by 16:00. What will you do?**

**Choose the right option below by circling the letter.**

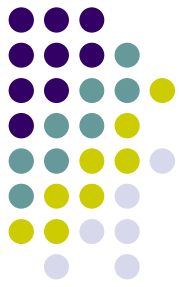
- A. Cancel all your immediate appointments and activities and see to the instruction.**
- B. Phone the regional manager for support and advice.**
- C. Be assertive and respond with a rational reason as to why this instruction will be attended to later.**
- D. Put your foot down and refuse to attend to an instruction, which is totally unreasonable according to your standards.**
- E. Pretend as not to have seen it and deal with it the next day.**

# SJT's Examples



- **Business Acumen**
- **As Manager you attend the monthly Chamber of Commerce meeting. Different chamber members, followed by lunch and drinks, deliver presentations. Various prominent business people representing Commerce, Industry and local government in your local community attend this function. The Chairperson asks the group if anyone would like to sponsor the drinks. You have no marketing budget, however, realise that there may be huge opportunities in terms of obtaining lots of new business. How would you as the branch manager handle the situation?**
- **Choose the right option below by circling the letter:**
  - A. **You pay for the drinks yourself and sort it out later with your Regional Manager**
  - B. **Phone your Regional Manager and request permission as there could be benefits in supporting the Chamber of Commerce**
  - C. **Agree to pay for drinks up to a limit of R1000 on condition that we are invited to promote the Bank's products and services at the next meeting. Sort out with RM later.**
  - D. **Politely decline explaining that the Bank's policy is not to promote the use of alcohol during business hours.**
  - E. **You pay for the drinks yourself and don't mention it to anyone**

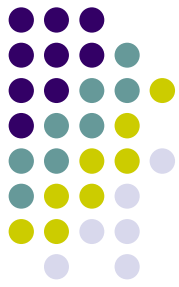
# SJT's Examples



- **Customer Orientation**

- **Numerous staff has complained about the abusive behaviour of the top performing Sales Consultant in your branch. After discussing the matter with the sales consultant, he informs you that he has a drug dependency problem. Your branch currently has only this one sales consultant to render services because of numerous vacancies in your branch and the absence of this employee will impact heavily on your service delivery. Your sales results are well behind target as well and you are being pressurised from your regional manager for this.**
- Choose the two most appropriate options to follow below by circling the letters.
  - A. Utilise a customer service clerk who shows potential to fulfil the role temporarily.
  - B. Suspend the employee pending a further in depth investigation.
  - C. Refer to Human Resources Business Partner to offer employee assistance.
  - D. Refer to the nearest drug rehabilitation centre for help.
  - E. Re-deploy FAIS Compliant staff within the region.
  - F. Inform the staff of the sales consultant's drug dependency in order for them to understand his behaviour.

# SJT's Examples



- **Valuing Diversity**

- **A customer phones you and complains about the fact that the frontline staff cannot speak his home language. This is the first language complaint the branch has received. How will you handle the situation?**

Choose the best option below by circling the letter.

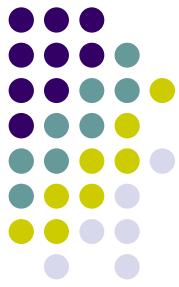
- A. Tell the customer that he has to accept the situation or move his account to the competition
- B. Tell the customer to visit a neighbouring branch where there is frontline of his choice.
- C. Apologize and explain to the customer that appointment of staff is subject to the demographics of your Branch/area
- D. Apologize and explain to the customer that Absa is part of a global company and the business language is English
- E. Approach your Regional Manager and request staff to be swapped out to address the language barrier.

# Personal Insight

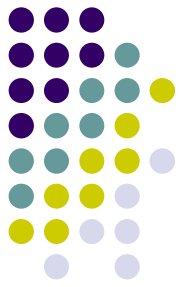


- The ability to think quickly and accurately on their feet without the aid of a calculator
  - Sixteen questions, fifteen minutes
  - Reason for inclusion

# Personal Insight: Example



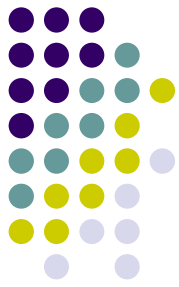
- **A boy, standing on his head, looks west. Which direction is on his right?**
  - north-west
  - north
  - east
  - north-east
  - south



# Personal Insight: Example

- **397 – 210 – 59. The middle number of your answer =**
  - 3
  - 2
  - 1
  - 8
  - not one of the above

# Evaluation of data



- How?
- Each situation was analysed
- Identified the different appropriate competencies
- Compiled a score sheet (hard copy)

# Interactive Exercises



- Conduct a proper meeting
  - A summary of eight pages of proper meeting procedures was handed to each participant
  - Instructions were very clear on what objectives were to be met
  - 45 minutes of preparation time
  - 30 minutes in which to conduct the meeting

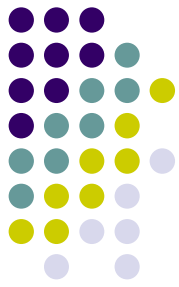
# Interactive exercises (continued)



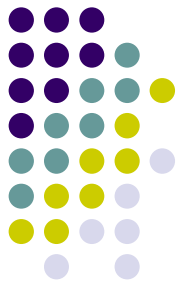
- **Performance development discussion**

- Details of the employee given to the participant
- Assessor (who was the role player as well) received a different brief (Terminal illness)
- 45 minutes to prepare
- 30 minutes to conduct the performance discussion

# Assessment of interactive exercises



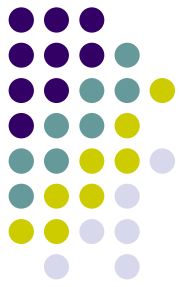
- Applicable dimensions
- 4 Point scale
- Score sheet
- Examples of observed behaviour
- Final score per dimension
- Final score transferred to integrated profile



# Final integration of scores

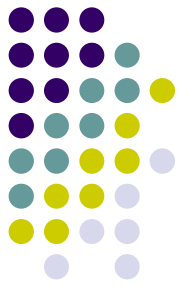
- Marking of SJT's
- Marking of Personal Insight
- Compile a file per participant
- Capture individual files per participant
- Capture individual exercises' information onto integrated report
- Compile a consolidated report per day

# Final integration of scores



- Weighting:
  - SJT's 40%
  - Interactive exercises 60%

# Infra Structure

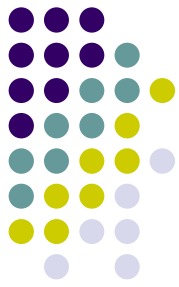


- **Venue: Minimum requirements**
  - One venue to accommodate  $\pm 50$  people
  - Four break away rooms that can accommodate at least ten participants at a time
  - Ten interview rooms
  - Coffee and tea station with no limitation regarding time
  - Lunch with limited restrictions regarding availability between 12:00 and 14:30
  - Accommodation for at least twenty people per night

# Infra structure continued:



- Cameras: Purpose
- Cameras: Transport
- Off loading of the cameras
- Camera stands

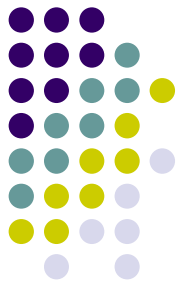


# Daily Programme

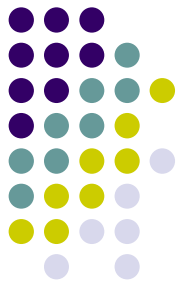
- Dependant on the number of participants
- Planning was done on 40 participants per day
- Did happen that less than 40 participants were assessed
- One assessor assesses at least four participants per day
- No one to leave until capturing has been finalised and balanced
- Could mean from 6:00 until 2:30 at night

# Administrators

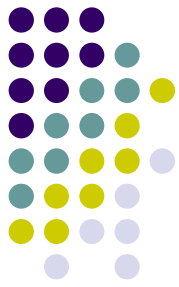
- One project owner
- Two administrators
- Planning



# Information management



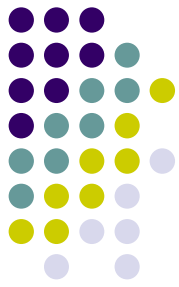
- Evidence: could go back on all tracks
- Pen and pencil evaluations
- Interactive exercises were video taped
- Correlation between interactive exercises' results
- Spot checks done by administrators



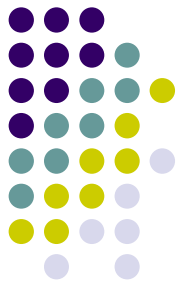
# Feedback

- Report per person
- Feedback given by Human Resources Business Partner and Regional Manager
- Report: one pager
- Development areas agreed by the parties involved
- Feedback to participants who did not fit the profile

# Feedback (continued)



- Development areas developed from job analysis
- Re-assessment: Only after one year  
Condition:           Development plan completed



# Measurable Impact

- Direct saving was a substantial amount
- No formal grievances
- No CCMA cases
- Biggest Human Resources intervention ever within Absa
- Validation of Assessment Centre results: next year??