

# PERSONALITY ASSESSMENT AND FEEDBACK PRACTICES AMONG EXECUTIVE COACHES: IN SEARCH OF A PARADIGM

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Personality assessment (PA) is used frequently by executive coaches but little has been reported about the specifics of its application. To fill this void, this study explored the current state of PA and feedback in coaching and the extent to which these practices resembled collaborative/therapeutic assessment (C/TA). Using a quantitative and qualitative approach, 112 psychologist-executive coaches were surveyed about various aspects of PA. Frequency data indicated that common methods exist in the areas of PA administration, analysis, and feedback as well as coaches' beliefs associated with the process. Qualitative findings revealed several themes describing coaches' approach to PA feedback, including an emphasis on building client self-awareness and a preference for exploring PA data in a highly collaborative, highly contextualized fashion. Overall, current practices aligned closely with C/TA, suggesting that a collaborative coaching assessment paradigm may represent an organizing framework for PA in coaching.

*Keywords:* personality assessment, executive coaching, leadership development, collaborative assessment, therapeutic assessment

A recent survey of executive coaches found that personality instruments are the most frequently used assessment methods in coaching, behind only interviews and multisource ratings (Bono, Purvanova, Towler, & Peterson, 2009). This trend is not surprising given the well-established linkages between personality traits and important organizational outcomes such as leader emergence, leader effectiveness, and leader derailment (see e.g., Hogan & Hogan, 2001; Judge, Bono, Ilies, & Gerhardt, 2002; Van Velsor & Leslie, 1995). However, little research has been conducted on the practice of personality assessment (PA) in coaching. Contributions to date have generally fallen into two

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categories: (1) articles that propose theories, conceptualizations, or models of assessment and feedback that do not directly relate to PA; and (2) case studies that describe idiosyncratic applications of PA. A review of this literature reveals some general convergence in approach but also a conceptual void regarding specific PA methods and practices.

Most models of assessment and feedback in coaching propose similar trajectories or cycles beginning with an impetus to launch an assessment, the use of assessment methods to gather data, a discussion about the data with the client, and plans for how the data will be used to inform coaching. Authors have repeatedly emphasized the need for collaboration between coaches and clients during these phases. For example, [London and Smither \(2002\)](#) described three core stages that focused largely on helping clients manage emotions associated with feedback. This model was elaborated on to include more specific consideration of steps involved in gathering data, ways to use feedback for goal setting, and relational factors between the coach and client ([Gregory, Levy, & Jeffers, 2008](#)). In his discussion of how to optimize 360 degree assessment feedback, [Nowack \(2009\)](#) highlighted ways that coaches could enlighten, encourage, and enable clients in a collaborative manner. Collaboration as outlined in these assessment and feedback models is consistent with the view that executive coaching at its core is a helping relationship ([Kilburg, 1996](#); [Van Velsor, McCauley, & Ruderman, 2010](#)).

The coaching literature also converges around the use of psychometric tools to improve clients' self-awareness. As part of an intentional change model, the assessment and feedback process has been described as a conduit for exploring ideal versus real self-images ([Boyatzis, 2008](#)). Individual case studies have outlined how PA helped trigger client awareness into behavioral patterns and establish an iterative feedback loop for coaching ([Diedrich, 1996](#)), informed and anchored the most relevant coaching goals ([Wasylyshyn, 2003](#)), clarified adaptive challenges during leader onboarding ([McCormick & Burch, 2008](#)), and identified interrelations among traits to explain risks for leader derailment ([Pratch & Levinson, 2002](#)).

Taken together, these models and case studies suggest that collaboration and awareness building are important aspects of PA and feedback in coaching. Conspicuously absent from this literature is information regarding the “nuts and bolts” of the process. That is to say, the sequence of activities involved in carrying out PA—test selection and administration, data analysis and interpretation, report writing, and specific feedback strategies—remains essentially unarticulated. Moreover, despite the general emphasis on collaboration and awareness building, models or conceptual tools to guide personality assessment and feedback in particular have not yet been proposed. In light of these trends, this study addresses the extent to which current practices are consistent with a well-established and empirically supported model of psychological assessment outlined in the next section.

### **Collaborative/Therapeutic Assessment**

Over the past 20 years, collaborative or therapeutic psychological assessment (C/TA) has begun to affect the way psychological assessment is conceptualized and practiced. This paradigm is rooted in phenomenological and intersubjective theories of psychology and views psychological assessment as an effective way to engage clients in conveying, reexamining, and revising their core narratives about themselves and the world and experimenting with more adaptive behaviors ([Finn, 2007](#); [Fischer, 1985/1994](#); [Handler, 2006](#)). In these ways C/TA distinguishes itself from information-gathering paradigms in which the aim of assessment is to collect data that will assist professionals make decisions and communicate recommendations about clients (see [Finn & Tonsager, 1997](#), for a detailed comparison). In organizational settings, the information-gathering paradigm model is closely aligned with approaches to personnel selection (see [Schmitt, 2014](#)) whereas the C/TA paradigm seems to better represent what is known about leadership development.

In seeking to improve client awareness and encourage more adaptive behaviors, C/TA offers a semistructured framework built on a trusting, respectful, and supportive relationship between assessor and client. [Finn \(2007\)](#) proposed that C/TA can lead to significant behavioral change when assessment data is used to help clients revise their core ways of thinking about themselves and the world. For such changes to occur, the assessor must acknowledge the

well-known human tendency toward self-verification (Swann, 1997). In other words, clients naturally search for assessment feedback that confirms their existing narratives and screen out information that contradicts them. Because they provide meaning and coherence in tying together the various aspects of personality (e.g., evolutionary influences, dispositional traits, characteristic adaptations; McAdams & Pals, 2006), existing narratives can be difficult to revise. For these reasons PA feedback that challenges clients' narratives is likely to create emotional distress and may subsequently be rejected. C/TA recognizes that this type of feedback is often the most crucial and therefore directly addresses these dynamics in its feedback approach (Finn, 2007).

A growing number of research studies now document that C/TA can help produce significant changes in clients in a short period of time. Although it has mainly been used to address clinical problems (see Finn & Tonsager, 1992; Newman & Greenway, 1997; Tharinger et al., 2009) C/TA also has proven effective with more "normal range" issues such as perfectionism (Aldea, Rice, Gormley, & Rojas, 2010), career decision making (Essig & Kelly, 2013), and executive advancement (Fischer & Finn, 2008). Poston and Hanson (2010) did a meta-analysis of research studies in which collaborative test feedback was used and concluded that individual assessors and applied education programs stand to benefit considerably from incorporating C/TA into their training.

Key aspects of the C/TA process include enlisting clients' curiosity about themselves and their life circumstances at the onset of the assessment, selecting assessment methods that are tied to clients' goals for the assessment, intentionally sequencing and delivering PA feedback, treating clients as coparticipants/observers who are essential partners in "editing" their core narratives, and helping design practical "miniexperiments" that help identify viable next steps for the client (see Finn, 1996). These principles and methods appear aligned with the general trends of collaboration and awareness building summarized earlier, and as such C/TA may represent a useful paradigm for organizing current PA and feedback approaches. Conceptual frameworks and practical guidelines in this area seem indicated given that (1) organizations and coaches are increasingly reliant on assessment tools to develop their talent (see Church & Rotolo, 2013) and (2) experts have recommended that leadership development initiatives be supported by cogent theoretical bases and solid methods (Avolio & Hannah, 2008; Kilburg, 1996; O'Connor Brown, 2010).

The present study seeks to explore the current state of PA in executive coaching, which could help crystallize existing "best practices," discover areas needing refinement, and inform directions for future research. More specifically, it attempts to determine whether existing practices resemble and align with C/TA. This study focuses on the practices of psychologist-coaches, which are especially relevant because psychologists are obligated to provide clear test feedback to clients per the American Psychological Association Ethics Code (American Psychological Association, 2002) and multiple authors have called for psychologist-coaches to leverage their proficiency in assessment to solidify the important role of psychology training to coaching (e.g., Brotman, Liberi, & Wasylyshyn, 1998; Wasylyshyn, 2001).

## Method

### Participants

An online survey was sent to 698 members of the American Psychological Association's Division 13 Society of Consulting Psychology. Completed responses were received from 112 participants (72 men and 37 women . . . ; 3 respondents did not indicate their gender) for a response rate of 16%. All participants possessed doctoral degrees in psychology and reported having conducted PA in their coaching practice. The average age of participants was 59 years with a standard deviation of 8.6. Additional demographic information for this sample is presented in Table 1. Participants were offered entry into a raffle drawing at the conclusion of the survey for a chance to win a \$200 Amazon gift card.

Table 1  
*Demographic Information*

	<i>M</i>	<i>SD</i>
Age	50.0	8.6
Years since obtaining doctoral degree	25.5	10.9
Years providing executive coaching services	18.3	9.2
	% of respondents	
Gender		
Male	66.1	
Female	33.9	
Race		
Black	0.0	
Hispanic/Latino(a)	0.0	
White	98.1	
Native American	0.0	
Other	1.9	
Degree		
PhD or PsyD in clinical psychology	27.9	
PhD or PsyD in counseling psychology	27.0	
PhD or PsyD in industrial/organizational psychology	26.1	
Other doctoral degree in psychology	18.9	
Employment setting		
Self-employed executive coach	46.8	
Private consulting firm	38.7	
Private corporation (nonconsulting firm)	2.7	
Government agency/not for profit	5.4	
Academic department/education	1.8	
Other	4.5	

*Note.*  $N = 112$ .

## Measure

The online survey was comprised of 65 items grouped into subsections that followed a temporal sequence of conducting PA. This sequence was adapted from steps outlined by contemporary authorities in the field of PA (see [Weiner & Greene, 2008](#)) as well as the typical flow of activities involved in C/TA (see [Finn, 2007](#)). Items were grouped into the following areas: selection of PA instruments (11 items), administration of PA instruments (10 items), analysis/interpretation of PA instruments (10 items), PA feedback practices (13 items), beliefs about assessment and feedback in coaching (13 items), and demographics (eight items). Item content was developed through consultation with five practicing executive coaches selected for their expertise in executive coaching and personality assessment. Each of these individuals held a doctorate in psychology and had an average of 6 years of postdoctoral executive coaching experience.

For items assessing the frequency of PA and feedback practices, response options consisted of a Likert-style scale with anchors of 1 (*never*), 2 (*rarely*), 3 (*sometimes*), 4 (*often*), and 5 (*always*). Items measuring beliefs about PA and feedback were assessed on a Likert-style scale with anchors of 1 (*strongly disagree*), 2 (*disagree*), 3 (*neither disagree or agree*), 4 (*agree*), and 5 (*strongly agree*). To directly assess whether coaches followed methods similar to C/TA, respondents were given a brief description of C/TA followed by an item with response option of *yes* or *no*. Finally, qualitative information was gathered through a free-text box that prompted coaches to describe their usual approach to providing PA and feedback.

## Results

### Descriptive Statistics

Descriptive data were generated to identify how common certain PA and feedback methods were used by coaches and how strongly certain beliefs about PA were endorsed. As part of the descriptive analysis, frequency distributions of items were examined to reveal the degree of consistency present in current practices. Frequencies were computed for all items because the scales are more categorical than continuous in nature and therefore may preclude the use of central tendency statistics (Stevens, 1951). Table 2 depicts frequency distribution data for items assessing PA and feedback practices across the entire sample. To conserve space, data for all items are not reported and original item content is truncated. Table 3 depicts the survey data for the same items and is segregated by educational background into two groups. In this table item responses of *often* and *always* were combined to demonstrate the degree to which coaches applied assessment and feedback practices regularly. In addition, item responses of *agree* and *strongly agree* were combined into one category, as were the three highest categories for the question concerning perspectives on art versus science. Notable trends in the descriptive data are summarized below.

With respect to the types of PA tools selected during coaching, global personality assessment instruments were used most frequently across the entire sample. Instruments based on the Big Five personality factors were used at about the same rate as those incorporating alternate conceptual models (48% to 52% respectively, for responses of *often* or *always* combined). The least frequently selected instruments were projective tools, followed by personality measures commonly used in clinical settings and packaged assessment systems. Although industrial/organizational (I/O) and other psychologists were more likely than clinical and counseling psychologists to select personally developed questionnaires, coaches from both groups showed very similar patterns in choosing assessments.

In terms of PA administration, coaches reported using PA instruments more frequently at the onset of coaching than in response to specific issues that arose at later intervals. Yet responses suggested that coaches were intentional and specific in their decision to administer PA instruments: 83% percent of coaches indicated that they *often* or *always* came to an agreement about the specific purpose for using PA instruments with their clients, and most coaches did not typically use a predetermined battery of assessments. Most coaches seemed to favor comprehensive, multimethod assessment practices—only 7% percent of coaches reported that they typically used a PA instrument as the only formal assessment instrument during coaching. Further, 77% of coaches *often* or *always* deliberately administered PA instruments in conjunction with the administration of other assessment instruments. Fifty-two percent reported *often* or *always* using instruments that provided information likely to be outside the client's conscious awareness.

Consistent practices also were found in the area of test analysis and interpretation. Coaches almost universally devoted time to analyzing PA data before reviewing it with clients (99% endorsed *often* or *always*), and when using multiple assessment tools, 88% made efforts to integrate these data with PA information. Seventy-three percent of coaches *often* or *always* used a structured process to analyze PA data; 87% *rarely* or *never* interpreted data in isolation. Although instruments designed for use in clinical settings were seldom selected, 69% of coaches reported using their knowledge of clinical disorders when interpreting the data. To assist their understanding of PA data, 82% of coaches *always* or *often* asked clients for their input whereas only 8% *always* relied on computer-generated narratives.

Coaches reported that giving PA feedback to clients was a very common aspect of their coaching practice. Ninety-eight percent of coaches *often* or *always* designated specific time for providing feedback and 88% *often* or *always* conducted these sessions in a face-to-face format even if they typically conduct their coaching via telephone or other mediums. However, only 53% of all coaches and 41% of clinical/counseling psychologists *often* or *always* delivered feedback using a specific model. Ninety-one percent of coaches reported that clients were likely to experience certain PA information as unpleasant at least some of the time.

Table 2  
*Frequency Distributions in Percentages*

Survey item	Never	Rarely	Sometimes	Often	Always
Selection of personality assessments					
Use some type of PA during coaching engagement	2%	6%	24%	<b>41%</b>	26%
Types of personality assessments used					
Nonclinical, global personality instruments based on five factor model <sup>a</sup>	12%	17%	23%	<b>33%</b>	15%
Nonclinical, global personality instruments not based on five factor model <sup>b</sup>	12%	15%	22%	<b>37%</b>	15%
Personality instruments emphasizing human needs and motivations <sup>c</sup>	22%	21%	<b>27%</b>	26%	4%
Self-report personality instruments commonly used in clinical settings <sup>d</sup>	<b>76%</b>	13%	8%	2%	1%
Free response/projective instruments <sup>e</sup>	<b>84%</b>	5%	6%	2%	3%
Emotional intelligence instruments <sup>f</sup>	<b>29%</b>	24%	28%	13%	6%
Packaged assessment systems that incorporate personality instruments <sup>g</sup>	<b>75%</b>	12%	9%	4%	1%
My own questionnaire/instrument that I have developed for my own use	<b>58%</b>	10%	15%	13%	3%
Other	<b>46%</b>	8%	29%	10%	8%
Administration of personality assessments					
Use standard battery of PAs for all coaching clients	21%	16%	22%	<b>26%</b>	15%
Coach and client agree on specific purpose for using PA(s)	2%	7%	8%	27%	<b>56%</b>
Select PA that provide data likely to be outside client's awareness	11%	13%	23%	<b>39%</b>	13%
Use PA and other type of assessment(s) during coaching	3%	4%	29%	<b>50%</b>	14%
Use multiple PAs during coaching	9%	<b>28%</b>	26%	21%	16%
Administer PA and other assessments at same time so all data can be reviewed concurrently	4%	6%	13%	<b>46%</b>	31%
Administer PA at onset of coaching	0%	3%	7%	<b>57%</b>	33%
Administer PA in response to specific issues in coaching	6%	28%	<b>50%</b>	12%	5%
Analysis and interpretation of personality assessment data					
Devote time to analyze PA data before reviewing with client	0%	0%	1%	8%	<b>91%</b>
Use structured process to analyze PA data	3%	6%	18%	36%	<b>37%</b>
Primarily use computer-generated narratives to interpret PA data	6%	<b>32%</b>	25%	29%	8%
Apply knowledge of personality disorders/clinical problems	12%	19%	25%	16%	28%
Ask clients for their thoughts and input before I have reached a final interpretation of the data	1%	7%	10%	31%	<b>51%</b>
Interpret assessment data sources in isolation	<b>66%</b>	28%	4%	1%	1%

Table 2 (continued)

Survey item	Never	Rarely	Sometimes	Often	Always		
Integrate data from different assessments during PA interpretation	0%	0%	3%	24%	<b>73%</b>		
Personality assessment feedback practices							
Designate specific time for PA feedback	0%	0%	2%	11%	<b>87%</b>		
Provide PA feedback using a specific model	5%	17%	24%	<b>29%</b>	24%		
Interpret meaning of PA data for client	0%	0%	10%	35%	<b>55%</b>		
Client and coach make sense of data together	0%	3%	3%	23%	<b>71%</b>		
Client finds some PA data unpleasant during feedback	0%	9%	<b>68%</b>	21%	2%		
Provide written summary of PA data to client	4%	18%	27%	<b>32%</b>	18%		
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree		
Beliefs about assessment and feedback							
Personality assessment and feedback have been useful in my coaching	0%	1%	1%	31%	<b>67%</b>		
Understanding client personality is more relevant to counseling than coaching	35%	<b>44%</b>	14%	5%	2%		
Psychologist-coaches skilled in PA may have advantage over other executive coaches	1%	2%	13%	33%	<b>51%</b>		
Very important for the coach to be authoritative and to appear expert and highly competent	4%	13%	26%	42%	14%		
Success of PA depends on trust and collaboration with client	0%	0%	1%	26%	<b>73%</b>		
I would favor a process in coaching that provides a deeper understanding of client personality	0%	2%	13%	39%	46%		
Perspective on personality assessment <sup>h</sup>	<1>	<2>	<3>	<4>	<5>	<6>	<7>
Perspective on PA (art vs. science)	0%	1%	5%	<b>39%</b>	32%	20%	3%
Use of collaborative/therapeutic assessment (CTA)	No	Yes					
I have used a process similar to CTA in my executive coaching engagements	40%	<b>60%</b>					

Note. PA = personality assessment.

<sup>a</sup> For example, NEO, 16 Personality Factor Questionnaire, Hogan Personality Inventory. <sup>b</sup> For example, Myers Briggs Type Inventory, California Personality Inventory. <sup>c</sup> For example, Fundamental Interpersonal Relations Orientation, Life Styles Inventory. <sup>d</sup> For example, Minnesota Multiphasic Personality Index, Personality Assessment Inventory, Millon Clinical Multiaxial Inventory. <sup>e</sup> For example, Rorschach Inkblot Method, Thematic Apperception Assessment, picture story exercises, sentence completion assessments, drawing assessments. <sup>f</sup> For example, Bar-On Emotional Quotient Inventory, Emotional Judgment Inventory. <sup>g</sup> For example, Birkman Method, Profile XT. <sup>h</sup> Based on a 7-point scale with three anchors ranging from <1> (PA is an art form that cannot be standardized), <4> (PA is equally an art form and a scientific process), to <7> (PA is a scientific process that can be standardized). The bold indicates the response with the highest frequency.

Results from items assessing coaches' beliefs about assessment and feedback corroborated the relevance of personality in executive coaching. For example, 98% of coaches agreed that PA has been useful in their coaching; only 7% believed that understanding client personality is more important in counseling than coaching. Moreover, 84% believed that psychologist-coaches skilled in PA may have an advantage over other coaches without such expertise. Eighty-five percent of

Table 3  
*Survey Responses by Educational Background*

Survey item	% (N = 61)	% (N = 50)
Selection of personality assessments	Counseling/clinical <sup>a</sup>	I/O and other <sup>a</sup>
Use some type of PA during coaching engagement	65.6%	70.0%
Types of personality assessments used		
Nonclinical, global personality instruments based on five factor model <sup>b</sup>	41.0%	50.0%
Nonclinical, global personality instruments not based on five factor model <sup>c</sup>	47.5%	48.0%
Personality instruments emphasizing human needs and motivations <sup>d</sup>	23.0%	34.0%
Self-report personality instruments commonly used in clinical settings <sup>e</sup>	1.6%	4.0%
Free response/projective instruments <sup>e</sup>	4.9%	4.0%
Emotional intelligence instruments <sup>f</sup>	16.4%	20.0%
Packaged assessment systems that incorporate personality instruments <sup>g</sup>	6.6%	2.0%
My own questionnaire/instrument that I have developed for my own use	9.8%	18.0%
Other	6.6%	10.0%
Administration of personality assessments		
Use standard battery of PAs for all coaching clients	37.7%	42.0%
Coach and client agree on specific purpose for using PA(s)	77.0%	76.0%
Select PA that provide data likely to be outside client's awareness	52.5%	46.0%
Use PA and other type of assessment(s) during coaching	59.0%	60.0%
Use multiple PAs during coaching	27.9%	40.0%
Administer PA and other assessments at same time so all data can be reviewed concurrently	70.5%	68.0%
Administer PA at onset of coaching	85.2%	80.0%
Administer PA in response to specific issues in coaching	19.7%	10.0%
Analysis and interpretation of personality assessment data		
Devote time to analyze PA data before reviewing with client	88.5%	90.0%
Use structured process to analyze PA data	62.3%	70.0%
Primarily use computer-generated narratives to interpret PA data	34.4%	32.0%
Apply knowledge of personality disorders/clinical problems	49.2%	28.0%
Ask clients for their thoughts and input before I have reached a final interpretation of the data	75.4%	74.0%
Interpret assessment data sources in isolation	1.6%	2.0%
Integrate data from different assessments during PA interpretation	78.7%	82.0%
Personality assessment feedback practices		
Designate specific time for PA feedback	88.5%	86.0%
Provide PA feedback using a specific model	41.0%	56.0%
Interpret meaning of PA data for client	83.6%	76.0%
Client and coach make sense of data together	85.2%	82.0%
Client finds some PA data unpleasant during feedback	18.0%	22.0%
Provide written summary of PA data to client	44.3%	46.0%
Beliefs about assessment and feedback <sup>h</sup>		
Personality assessment and feedback have been useful in my coaching	83.6%	84.0%
Understanding client personality is more relevant to counseling than coaching	3.3%	10.0%
Psychologist-coaches skilled in PA may have advantage over other executive coaches	75.4%	70.0%



Table 3 (continued)

Survey item	% (N = 61)	% (N = 50)
Very important for the coach to be authoritative and to appear expert and highly competent	50.8%	48.0%
Success of PA depends on trust and collaboration with client	83.6%	90.0%
I would favor a process in coaching that provides a deeper understanding of client personality	72.1%	74.0%
Perspective on personality assessment <sup>f</sup>		
Perspective on PA (art vs. science)	43%	54%
Use of collaborative/therapeutic assessment (CTA) <sup>j</sup>		
I have used a process similar to CTA in my executive coaching engagements	60.3%	52.3%

Note. I/O = industrial/organizational; PA = personality assessment.

<sup>a</sup> Represents percentage of *often* or *always* responses from a 5-point frequency Likert scale (*never, rarely, sometimes, often, always*). <sup>b</sup> For example, NEO, 16 Personality Factor Questionnaire, Hogan Personality Inventory. <sup>c</sup> For example, Myers Briggs Type Inventory, California Personality Inventory. <sup>d</sup> For example, Fundamental Interpersonal Relations Orientation, Life Styles Inventory. <sup>e</sup> For example, Minnesota Multiphasic Personality Index, Personality Assessment Inventory, Millon Clinical Multiaxial Inventory. <sup>f</sup> For example, Rorschach Inkblot Method, Thematic Apperception Assessment, picture story exercises, sentence completion assessments, drawing assessments. <sup>g</sup> For example, Bar-On Emotional Quotient Inventory, Emotional Judgment Inventory. <sup>h</sup> For example, Birkman Method, Profile XT. <sup>i</sup> Represents percentage of three highest categories on 7-point scale with three anchors ranging from <1> (*PA is an art form that cannot be standardized*), <4> (*PA is equally an art form and a scientific process*), to <7> (*PA is a scientific process that can be standardized*). <sup>j</sup> Represents percentage of *yes* responses from dichotomous *yes/no* response options.

coaches reported having interest in an approach to PA that offered a deeper understanding of client personality and 60% indicated that they have actually used an approach similar to C/TA.

### Inferential Statistics

Nonparametric statistics were used in the inferential analyses due to the ordinal nature of the response scale. This approach was chosen because the scales used in the survey did not possess interval measurement level properties such as equidistance between categories and continuity of numeric values. These response options are more similar to an ordinal level of measurement than interval (Stevens, 1946).

Because evidence has shown that type of psychology training contributes to significant differences in coaching approaches (Bono et al., 2009), respondents were split into two groups: (1) those with a doctoral degree in clinical or counseling psychology and (2) those with a doctoral degree in I/O or other psychology. This study hypothesized that coaches from clinical and counseling psychology backgrounds would approach PA more comprehensively (i.e., inclusive of more facets of personality) and with greater attunement to relational factors than those from I/O and other backgrounds due to training that places greater emphasis on distinctions between mental health and mental illness, intrapsychic processes, and dyadic interpersonal factors (Fouad et al., 2009). Group differences were examined using nonparametric Cliff's (1993) delta significance tests with effect sizes for six items that appeared likely to be influenced by educational background.

Results of the Cliff's (1993) delta tests are presented in Table 4. Cliff's delta provides an effect size indicating the probability that one group has a higher value on an item than the comparison group (Cliff, 1993). In the present analysis, a positive value indicates that clinical/counseling psychologists have higher scores, and a negative value indicates that I/O/other respondents have higher scores. To assist interpretation, Romano, Kromrey, Coraggio, and Skowronek (2006) proposed guidelines for negligible ( $d < .15$ ), small ( $d < .33$ ), medium ( $d < .47$ ), and large ( $d > .46$ ) effect sizes, where all values are absolute positive values. Significant differences between clinical/counseling and I/O/other psychologists were obtained for two items. Clinical/counseling psychologists more often used their knowledge of personality disorders and other clinical problems in

Table 4  
*Educational Background Significance Tests*

Question	Cliff's delta test of significance	
	<i>d</i>	<i>p</i> value
Select PA that provide data likely to be outside client's awareness <sup>a</sup>	.03	.77
Use multiple PAs during coaching <sup>b</sup>	-.23	.03*
Apply knowledge of personality disorders/clinical problems <sup>a</sup>	.37	.00**
Understanding client personality is more relevant to counseling than coaching <sup>b</sup>	-.04	.75
Important for the coach to be authoritative and to appear expert and highly competent during PA feedback <sup>a</sup>	.08	.47
I would favor a process in coaching that provides a deeper understanding of client personality <sup>b</sup>	.03	.77

*Note.* *d* = Cliff's delta (effect size); PA = personality assessment.

<sup>a</sup> Higher scores for clinical and counseling group. <sup>b</sup> Higher scores for industrial/organizational and other group.  
 \* Significant at  $\alpha < .05$ . \*\* Significant at  $\alpha < .001$ .

analyzing PA data than did I/O/other psychologists ( $d = .37, p < .001$ ), as evidenced by a positive delta value. I/O/other psychologists, however, more often administered multiple PA instruments during the course of a coaching engagement ( $Ud = -.23, p < .05$ ).

We hypothesized that certain practices and beliefs of coaches would vary across those who have and have not used a process similar to C/TA. Toward the end of the survey, respondents were presented with a brief description of C/TA and asked whether they have used a similar approach to PA and feedback. To compare these two groups, differences on nine items were investigated between respondents who selected *yes* and those who selected *no* to the question, "I have used a process similar to C/TA in my executive coaching engagements." These nine items were thought to represent core and potentially distinguishing features of C/TA that may not be shared by other approaches to PA and feedback (see Finn, 2007). Results of the Cliff's (1993) delta tests are presented in Table 5. Significant differences between the two groups were obtained for two items. Those who have used a process similar to C/TA used a structured process to analyze PA data ( $d = .28, p < .05$ ) and asked their clients for input ( $d = .25, p < .05$ ) more frequently than those who did not use this type of process. Interpretation of the absolute values of effect sizes indicate small to medium effects ( $|d| = .23$  to  $|d| = .37$ ) for the significant results (Romano et al., 2006). Effect sizes estimate the magnitude of the relationships/differences and also lessen reliance on significance testing, which is prone to Type I error in the presence of multiple tests.

## Qualitative Data

To gain a more detailed perspective on PA feedback practices, qualitative data were obtained from responses to the survey item:

Please write a brief paragraph describing your approach to delivering personality assessment feedback to your coaching clients (e.g., what you hold in mind in planning how to talk to your clients, how you manage the actual feedback, and any general principles or theories you make use of during the process).

Following a grounded theory approach (Creswell, 2012), data were analyzed to capture major themes and subthemes.

Qualitative themes are displayed in Table 6. Themes are presented in order of frequency; Theme 1 recurred the most frequently and Theme 5 recurred the least frequently. Data were reviewed and coded several times until the analysis reached saturation, or the point at which no new themes emerged beyond the five listed. Subthemes captured the core elements of the main theme, and selected verbatim quotes were those that best represented the essence of the given theme.

Table 5  
*Using Versus Not Using a Process Similar to CTA Significance Tests*

Question	Cliff's delta test of significance	
	<i>d</i>	<i>p</i> value
Coach and client agree on specific purpose for using PA(s) <sup>a</sup>	.03	.79
Select PA that provides data likely to be outside client's awareness <sup>a</sup>	.01	.91
Use structured process to analyze PA data <sup>a</sup>	.28	.02*
Ask clients for their thoughts and input before reaching final interpretation of the data <sup>a</sup>	.25	.03*
Provide PA feedback using a specific model <sup>a</sup>	.11	.34
Client and coach make sense of data together <sup>a</sup>	.08	.40
Provide written summary of PA data to client <sup>a</sup>	.07	.55
Forming a relationship of trust and collaboration is important for success with PA in coaching <sup>a</sup>	.08	.43
Important for the coach to be authoritative and to appear expert and highly competent during PA feedback <sup>a</sup>	.12	.30

*Note.* CTA = collaborative/therapeutic assessment; *d* = Cliff's delta (effect size); PA = personality assessment.

<sup>a</sup> Higher scores for *yes* respondents to "Using process similar to CTA" question. <sup>b</sup> Higher scores for *no* respondents to "Using process similar to CTA" question.

\* Significant at  $\alpha < .05$ .

## Discussion

### Current PA and Feedback Practices

The results of this study provide a glimpse into current PA and feedback practices among psychologist-coaches. Perhaps the most striking pattern in these results is the degree of consistency in many practices and methods. In accordance with the literature to date, collaboration and awareness building were identified as key aspects of the PA and feedback process. Psychologist-coaches also appear to use test administration and interpretation techniques characteristic of a multitrait-multimethod (MTMM) approach (Campbell & Fiske, 1959). These findings are encouraging in light of the commonly held notion that more sophisticated and multifaceted processes not only improve assessment validity and reliability but also the utility of feedback for clients (see Allen & Yen, 2002; Smith & Finn, *in press*).

One particular area of convergence is coaches' tendency to "frontload" their engagements with a comprehensive assessment process that incorporates PA instruments. This study found that the early phases of coaching are characterized by extensive information-gathering about the client's personality and performance alongside efforts to build interpersonal trust and collaboration. The amount of time, resources, and client motivation required to launch coaching engagements in this way is considerable, and stakes are high: A successful assessment process could accelerate learning and progress toward coaching goals but an unsuccessful one could have a significant negative impact on the entire coaching engagement. Intensive assessment at the onset of coaching engagements underscores the need for coaches to carefully consider their approach to PA and feedback.

Clinical and counseling psychologists did not differ from I/O and other psychologists to the degree expected, which further evidences commonality in PA and feedback techniques across psychologist-coaches. The stronger tendency of I/O and other psychologists to use multiple PA instruments during coaching may reflect greater familiarity with psychometrics and more concern for establishing convergent validity, whereas the increased likelihood of clinical and counseling psychologists to incorporate their knowledge of psychological disorders is probably a direct result of training and experience in the area of mental illness.

Table 6  
*Qualitative Themes Describing Coaches' Personality Assessment and Feedback Practices*

Theme	Subthemes	Quote(s) representative of themes
1) Coach endeavors to make PA data relevant, experience near, and contextually sensitive	<ul style="list-style-type: none"> <li>• Encourages specific examples and experiences that reflect assessment data</li> <li>• Discusses implications of PA trends in relation to various organizational dynamics (e.g., culture, roles and responsibilities, relationships with superiors and subordinate)</li> <li>• Determines how PA data should inform specific client actions and overall goals of the coaching engagement</li> </ul>	<ul style="list-style-type: none"> <li>• "My focus is to make the feedback relevant; that is, I work with the client to relate each piece of assessment data directly to some aspect of their work experience."</li> <li>• "I make every effort to tie the data to the challenges and goals of their job and the leadership impact they desire to affect."</li> </ul>
2) Coach uses PA data to improve client's self-awareness and self-understanding	<ul style="list-style-type: none"> <li>• Reviews new insights into client's strengths, limitations, and opportunities for development</li> <li>• Discusses how PA data helps explain client's current behavioral tendencies and preferences</li> <li>• Discusses implications of PA data for client's past, present, or future workplace performance</li> </ul>	<ul style="list-style-type: none"> <li>• "The data helps me engage my client in discussions about how they perceive, experience, and respond to the immediate business situation and how this is similar/dissimilar from their past experience."</li> <li>• "I use the assessment information to find the areas where a client will shine and where she or he is likely to struggle."</li> </ul>
3) Coach educates client about concepts related to personality assessment	<ul style="list-style-type: none"> <li>• Explains properties of PA tests administered and/or psychometric concepts in general</li> <li>• Educates client on topics relevant to assessment data (e.g., personality theories, leader derailment factors)</li> </ul>	<ul style="list-style-type: none"> <li>• "I will also point out that 'personality' is a set of traits, which, over time, becomes, in the minds of others, something called 'reputation.'"</li> </ul>
4) Coach and client work together to understand meaning of personality assessment data	<ul style="list-style-type: none"> <li>• Coach invites client to interpret the assessment data</li> <li>• Coach presents assessment data-based interpretations as hypotheses to be explored</li> <li>• Coach and client review assessment materials at the same time</li> </ul>	<ul style="list-style-type: none"> <li>• "Often I ask for the client's impressions before offering mine or the judgments from the instruments, to allow tailoring of the feedback process."</li> <li>• "When we review the report together, I'm careful to present the results tentatively, ask the client what stands out to them and whether the results feel like they fit."</li> </ul>
5) Coach provides feedback that integrates PA data with other data sources	<ul style="list-style-type: none"> <li>• Makes connections between PA data and client's 360-degree assessment results</li> <li>• Reviews how PA data fits into client's life history (as derived from initial interview of client)</li> <li>• Identifies themes and patterns within PA data and/or across all assessment data</li> </ul>	<ul style="list-style-type: none"> <li>• "I keep in mind all previously-gathered data points, whether from a 360, life history interview, or feedback from the client's boss. I make a point to link common elements or themes."</li> </ul>

Note. PA = personality assessment.

## Degree of Fit Between Current Practices and C/TA

This study attempted to determine how closely C/TA was aligned with current PA and feedback practices. Qualitative survey data suggested that many psychologist-coaches approach PA feedback with a set of overarching values and principles consistent with C/TA. Most notable is the maintenance of a collaborative partnership in which coaches refrain from unilateral interpretations and instead explicitly seek clients' input about the test data. In other words, coaches facilitate a process of exploration and discovery through carefully guided inquiry surrounding the test data. The nature of this stance appears both (1) humanistic, in that it acknowledges clients' inherent capacity to make sense of the data; and (2) egalitarian, in that client contributions are seen as essential to making the feedback process meaningful and productive. In the same way, the themes suggest that the objective meaning of PA data may be less important than one that is contextually sensitive, accepted by the client, and relevant to the coaching agenda.

Quantitative data also indicated that psychologist-coaches are already practicing many aspects of C/TA throughout the assessment process. In contrast to the information-gathering approach to PA in which the assessor's goals are to diagnose and recommend (see [Finn & Tonsager, 1997](#)), coaches tend to solicit client input about the tests administered and the reasons for doing so; integrate PA data with other data available to arrive at a comprehensive understanding of the client; and actively work with the client to formulate mutually agreeable conclusions. Rather than using a fixed battery of tests, most coaches also appear to select their assessment instruments according to the needs and goals of each client. Perhaps the format and procedures of C/TA are so adaptable to executive coaching because coaches have found it essential to collaborate with their talented and highly capable clients. In C/TA clients are involved in every step of an assessment, from setting explicit goals (usually in the form of questions to be answered via the assessment), specifying how data will be collected, interpreting assessment findings and tying them to real life, to dialoguing about the implications for next steps and trying them out in relevant settings or in role plays, and reviewing and discussing written feedback at the end of an assessment. It is also possible that coaching practices have evolved toward collaborative assessment because such practices create the highest client satisfaction (cf. [Poston & Hanson, 2010](#)).

By endorsing values and practices consistent with C/TA, psychologist-coaches demonstrate a willingness to "go deep" with clients during the PA process, which is an important finding given the ongoing controversy about the role of clinical skill in executive coaching (see [Hart, Blattner, & Leipsic, 2001](#); [Kilburg, 2004](#)). For example, coaches regularly select PA tools that provide information outside the client's conscious awareness and often are in the position of providing unpleasant feedback to clients. C/TA appears to be an excellent fit for navigating these circumstances—which can be veritable landmines to successful coaching outcomes—because it dictates that assessors sequence test feedback in three levels that correspond to clients' existing narratives. Level 1 feedback consists of data that verify the clients' usual ways of thinking about themselves. Level 2's feedback modifies or amplifies the clients' usual ways of thinking but poses little risk to their self-esteem. Level 3's feedback are findings so novel or discrepant that they contradict clients' existing narratives and are thus likely to be rejected, discarded, or create psychological distress ([Finn, 2007](#)). By presenting Level 1 feedback first, coaches can address the "self-verification" needs of their clients, who will then be more open to considering feedback that is discrepant from how they usually think about themselves (Level 2 and Level 3). C/TA's conceptualization of feedback in light of personal narratives has overlap with schema theory, which posits that novel data is more likely to be accepted when it is consistent with clients' existing mental frameworks (see [Baldwin, 1992](#)).

An interesting discrepancy between typical C/TA practices and those of coaches concerns the use of performance-based (i.e., projective) personality instruments. Less than 5% of the coaches surveyed use such instruments, perhaps because of their low face validity, association with psychopathology, or time-consuming administration (see [Del Giudice, 2010](#)). However, in C/TA, projective tests are used frequently during the "experimentation" phase of the assessment and can be useful in helping clients grasp Level 2 and Level 3 information. For example, a coach may conclude that a client has difficulty being appropriately assertive but may also realize that the client

is unaware of this difficulty. The coach might ask the client to tell stories to Picture Story Exercise (PSE; McClelland, Koestner, & Weinberger, 1989) or Thematic Apperception Test (TAT; Murray, 1943) images that typically elicit assertive or aggressive themes. If the client's stories show a lack of assertiveness, the coach might discuss the stories with the client to highlight this finding, and ask for parallels to work performance. A flexible, nonstandardized application of projective tests might serve as a different tool than role-plays for exploring more adaptive behavioral strategies.

Despite the widespread endorsement of C/TA values and techniques, and the finding that 60% of coaches reported using a process similar to C/TA, only about half of coaches reported approaching PA and feedback with a specific model in mind. Thus it appears that many coaches (especially clinical and counseling psychologists, according to the data) may have "bootstrapped" themselves to develop their own strategies. Although these techniques appear to constitute effective collaborative intervention, we believe that adopting a model would be advantageous in providing theoretical justification for coaches' approach, allowing for deeper conceptualizations of assessment data, affording practical guidance for coaches navigating key decision points, better enabling research in this area, and offering a paradigm for training and educating coaches.

Overall, this study found that coaches are using principles and methods with enough frequency to inform our understanding of the nuts and bolts of the assessment process heretofore unaddressed by research. Results suggest that C/TA represents a good fit for coaching activities associated with Stages, 2, 3, and 4 of the coaching assessment process depicted in Figure 1 (adapted from Gregory et al., 2008); it also presents opportunities for new techniques that align with existing practices. However, data and field experience alike suggest that C/TA would require refinement to accommodate the demands of consulting to organizational leaders.

### Collaborative Coaching Assessment: Accounting for the Business Context

The steep learning curve facing psychologist-coaches without business backgrounds is well documented (see Peltier, 2009). Although this study found that coaches favor deeper and comprehensive methods characteristic of C/TA, results suggest that the business setting discourages certain aspects of C/TA. The first pertains to the general comportment of the coach. Whereas the assessor in C/TA deliberately downplays the role of authoritative expert to engage lower status mental health clients as collaborators, many psychologist-coaches reported that maintaining this type of posture is important to their work. Such beliefs are likely driven from pressure for coaching to be a legitimate, value-added activity in the competitive business environment. Therefore coaches practicing C/TA may need to communicate that highly collaborative methods reflect the best use of their expert knowledge and experience.

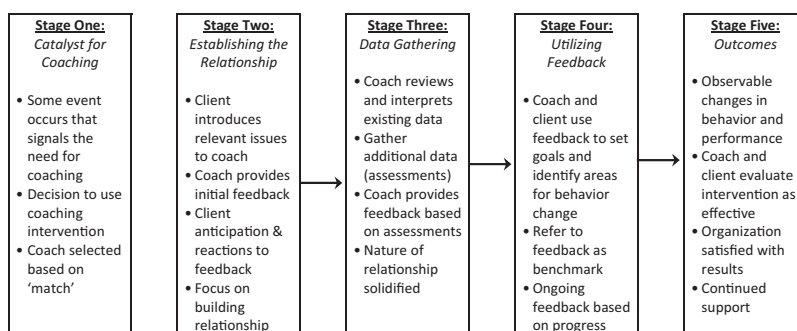


Figure 1. Feedback process in executive coaching. Adapted from "Development of a Model of the Feedback Process Within Executive Coaching," by J. B. Gregory, P. E. Levy, and M. Jeffers, 2008, *Consulting Psychology Journal: Practice and Research*, 60, p. 52. Copyright 2008 by American Psychological Association.

Results also indicated that psychologist-coaches (mostly those from clinical and counseling backgrounds) rarely use tools that assess psychopathology, yet are comfortable using their knowledge of clinical disorders when making sense of PA data. This trend suggests that coaches engage in a process of “translating” clinically informed insights to ensure that feedback is perceived as noninvasive and job relevant. More generally, C/TA’s emphasis on fostering awareness and adaptation through the revision of core narratives could render assessors susceptible to an overly clinical approach. Avoiding this stance is an imperative for effective assessment practices in organizations.

Finally, preparation of a summary letter to clients is a *sine qua non* for C/TA in clinical settings because of research showing that such letters are important clinical interventions (Finn, 2007). But this study found that coaches write assessment reports only some of the time. Business environments may value brevity and action over depth and description, in which case C/TA results could be prepared as executive summaries, integrated into the clients’ development plan, or simply shared verbally and revisited throughout the coaching engagement as needed. In fact, such practices are in keeping with C/TA’s emphasis on adapting methods to each client’s context and individual needs (Finn, 2007). C/TA is also highly experiential, which is a good fit for the action-oriented business setting: Assessment results are typically revisited over several sessions and are used to guide role plays, simulations, and experimentation with new behaviors. Coaches clearly favor a contextualized, behaviorally oriented approach to PA feedback, suggesting that C/TA would be informative in helping coaches make PA data “come to life” in ways most relevant to the client.

For the reasons outlined previously we propose that C/TA be referred to as collaborative coaching assessment (CCA) when applied to executive coaching engagements. CCA seems readily adaptable to various types of coaching engagements (see Witherspoon & White, 1996, for a review of different types), especially in cases involving high-potentials pegged to assume greater leadership responsibilities in the future. By enlisting clients’ curiosity about themselves and collaborating with them to understand assessment data, CCA can deepen levels of self-awareness and thus help mitigate derailment potential. For cases in which performance remediation is required, CCA’s sequenced feedback strategy and hands-on, experiential approach could increase the likelihood of sustained behavioral change. In all cases, CCA’s attention to clients’ core narratives can help coaches integrate 360-degree data (largely behavioral in nature) with personality information (often less directly observable) in the service of explaining work performance rather than simply describing it.

## Limitations

Several limitations of this study must be acknowledged, some of which pertain to the survey’s content. Whereas phases and techniques for conducting PA in clinical settings have been well-articulated in the literature (e.g., Weiner & Greene, 2008), no studies or models pertaining to coaching have been introduced. In the absence of such research, establishing the most meaningful survey items was somewhat speculative. Themes from qualitative responses suggest that surveying topics specific to the business environment (e.g., matching PA data to traits of organizational culture, interpreting PA data in light of client job role and responsibility) would have been quite informative. However, the primary aims of this study were to measure basic elements of PA and feedback as well as the degree of fit between current practices and C/TA.

The modest sample size and sample homogeneity of this study limit its generalizability and likely shaped certain response trends. By focusing almost exclusively on doctoral-level psychologist-coaches trained in the United States, its results may shed light on only a sliver of the current state of PA and feedback practices in coaching. Further, survey respondents were self-selected and volunteered at a rate of 16%; therefore the sample may represent coaches who are most interested in PA, contributing to more favorable responses (e.g., higher rates of item endorsement, greater amenability to a more comprehensive PA model such as C/TA) than would be expected from a more randomized sample. Despite these shortcomings, we believe the targeted sample and narrowed focus were appropriate given the lack of research in this area and calls for psychologist-coaches to more purposefully leverage their education and training.

Last, the apparent degree of consistency in assessment practices may have occurred due to social desirability. For example, items such as, “I favor instruments that show psychometric soundness” and “I devote specific time to analyzing PA data and providing feedback” are consistent with American Psychological Association ethical principles (2002) and likely reflect values of professionalism and conscientiousness to which any assessment psychologist might aspire. Therefore the results may not paint as accurate or nuanced a picture of current PA and feedback practices as would be desired.

### Implications for Future Research

This exploratory study identified a number of PA assessment and feedback practices that are consistently used in coaching engagements. Most coaches also reported that personality is an appropriate focal point of leadership development initiatives, indicated that PA has been useful in their coaching, and favored methods that assess personality more deeply. But a broader question remains: Does PA really add value to coaching in the first place?

Comparing the effectiveness of coaching programs using PA versus those that do not would be a logical first step toward advancing this line of research. Given the various costs associated with PA—including time, resources, and potential discomfort for clients—empirical outcome studies of this type would have significant implications. Initial studies might compare engagements that use only multirater feedback versus those that incorporate personality assessment tools. Subsequent studies could explore different approaches to PA feedback to determine if CCA is in fact more effective than authoritative approaches or control conditions in which clients interpret PA data without the help of a coach.

To better understand the value of PA and feedback, qualitative studies should include the key stakeholders in coaching engagements. Obtaining client perceptions of the most useful aspects of the PA and feedback process might help coaches structure their approach in a more targeted, client-centered fashion. Research on mutative factors in psychological assessment has already been conducted in counseling settings (see Ward, 2008), and these qualitative methods seem readily transferrable to organizational cohorts. To the extent that other members of the client’s sponsoring organization (e.g., bosses, mentors) were involved with the PA and feedback process, their perspectives would inform our understanding of the balance between client preferences and organizational imperatives.

### Conclusions

This study explored the current state of personality assessment in coaching and determined that its predominant methods and values are closely aligned with C/TA. Very similar trends emerged across psychologist-coaches from different backgrounds, suggesting that CCA may be broadly applicable to this area of consulting psychology. Because CCA resembles how many coaches are already practicing PA and feedback, it appears viable as an organizing paradigm for practice, training, and research.

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