

Assessment Selection Checklist

The following are some considerations that we believe are important in the selection of which assessment(s) to bring into our business/practices. These are some factors that we considered in our assessment selection process. As you evaluate and consider various assessments, some of these items will be critical for you and your business, while others may not be as important. And there are other factors that may be important to you and you will want to add to this checklist. It is our hope this checklist will assist you with your business decision around assessments.

Why and How

- Why and how would I use this particular assessment?
- Does it fit into and support my business?
- Is it timely to bring assessments/this assessment into my business?

Validation

- Is the assessment a validated instrument?
- What does it measure and is it accurate?
- There are a number of different types of validation such as predictive, divergent, convergent, concurrent and face validation. The one we as coaches tend to focus on is "face validation" – in other words on the face of it, how true is it? Validation is an important consideration.
- Is the validation current? Is on-going research being conducted?
- Do the validations take into account biases and cultural issues?

Reliability

- How reliable is the instrument? Does it produce the same results when retaken by the same individual?

Assessment Roots

- What is the genesis, history of the assessment?
- What is the basis of the assessment (such as psychological based, behavioral based, etc)?

Initial Investment

- What is the cost of entry to use this assessment? Initial set-up fees, Software purchase, etc.?
- Distributorship or Licensing fee?

Training Cost

- Is training available or required and how is the training delivered (on-site, virtual, self-study)?
- What is the cost of the training (including potential travel, materials, etc.)?

_____ **Annual Requirements/Fees**

- Is there an annual renewal fee?
- Are there minimum annual purchases or selling volume requirements?
- Are there any other annual required fees?

_____ **Cost of the Assessments**

- What is the cost for me to purchase the assessments?
- Are there other costs associated with acquiring and generating the assessments (such as internet on-line services, software upgrade costs, etc.)?

_____ **Retail Price**

- What is the typical selling price of the assessment(s) in the market place?
- Is there flexibility in establishing the selling price of the assessment?

_____ **Certification Requirements**

- Is certification required to use and/or administer the assessment(s)?
- What is the cost of the certification process and exams?
- How long is the certification valid? Renewable? Recertification requirements?

_____ **Completion Time Requirement**

- How long does it take to complete the assessment questionnaire?

_____ **Accessibility**

- How are the assessments accessed (software, pencil/paper, on-line, send-off for scoring, etc)?
- Is there a self-scoring version?

_____ **Readability Index**

- What is the reading level index?
- Is the layout professional, clean, and clear?
- Are there visuals such as graphs, charts, etc?

_____ **Technical Support**

- How much support is available if there are technical issues?
- Does the publisher/supplier keep up with technological advances/changes?

_____ **Administrative Support**

- What kind of support is available with assessment interpretation issues?
- Is there online information and support available?
- Are there periodic supports available, such as teleclasses, conferences?

_____ **Marketing Support**

- Are marketing materials available (such as brochures, fact sheets, displays, etc)? If so, typical cost of these items?
- Are easy to use, pre-designed workshops/seminars available?

_____ **Other Assessments and Products Available**

- Are other assessments available (i.e. possible one-stop shopping) or is it a one-assessment company?
- Are there other products available that support the assessments (such as books, CD's, etc.)?

_____ **Language Availability**

- What languages are available? In the areas that I work or plan to work, are the assessments available in that language?

_____ **Fit**

- What is the compatibility/Interaction with other assessments I am using or considering?

_____ **Profit Center Possibilities**

- Are there ways that I can structure the assessments to leverage as a revenue stream, such as set up assessment accounts in organizations?

_____ **Value to the Client /Coaching Process**

- How is the assessment contributing to and supporting my client(s) and the coaching process?

We hope you will find this checklist useful as you begin your journey into the exciting and powerful world of assessments. If we can assist you in any way, please let us know.

Warmly,

Winston and Barb Connor