



Education
Advisory
Board

Advancement Forum

Gifted and Talented:

What Makes a Top Fundraiser in the Age of Venture Philanthropy?



eab.com

Advancement Forum

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Gifted & Talented: What Makes a Top Fundraiser?

A Roadmap



Gifted & Talented: What Makes a Top Fundraiser?

A Roadmap



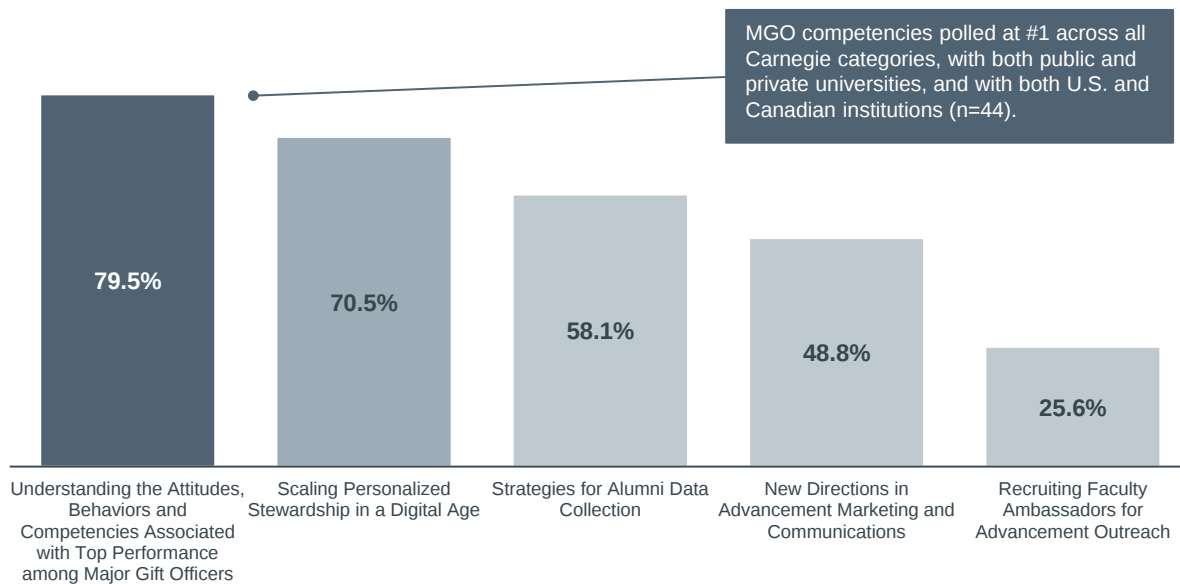


Top of Pyramid is Top of Mind

MGO Human Capital is the Up-at-Night Issue Among CAOs

8

Fall 2013 Advancement Forum Topic Poll Results
Percentage of Respondents Responding with "A" Grade



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Source: EAB interviews and analysis.

The Terrifying Terabyte

No Longer the Data Gatekeepers



9



From Supplier to Clarifier

"When buyers know more than sellers, sellers are no longer protectors and purveyors of information. They're the curators and clarifiers of it—helping to make sense of the blizzard of facts, data, and options."

*Daniel Pink,
To Sell is Human*



The End of an Era

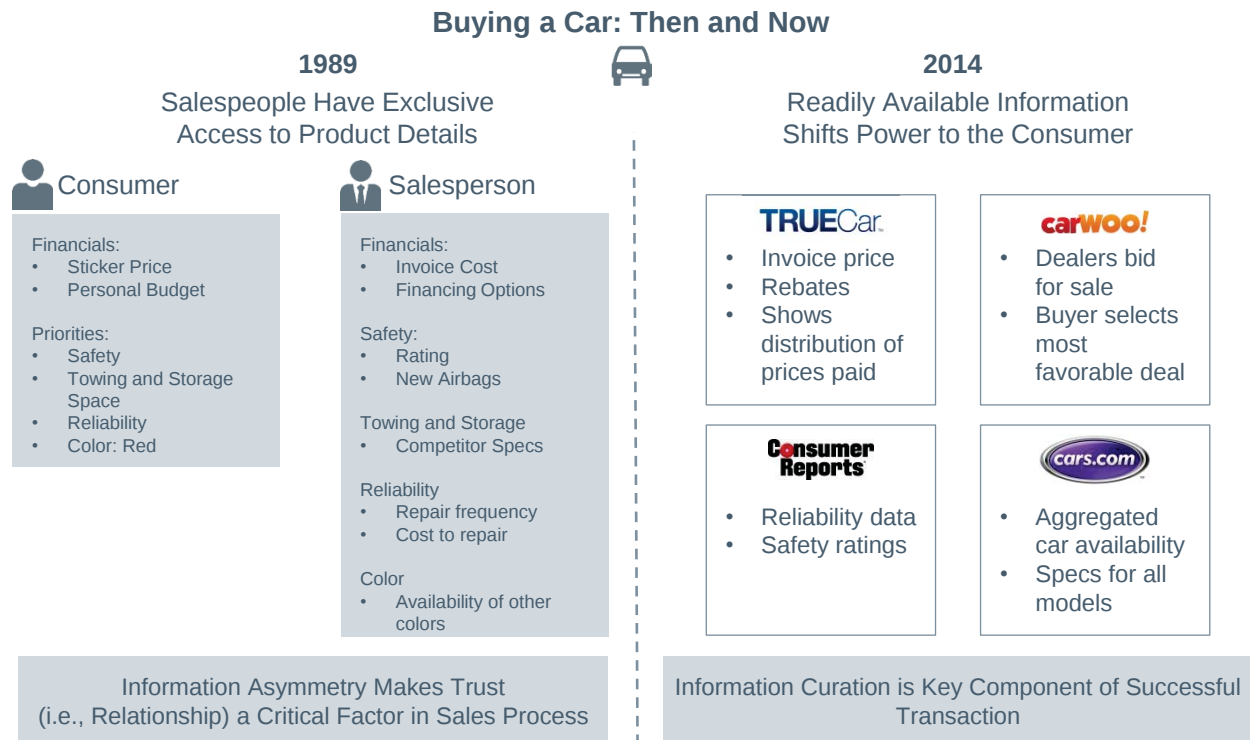
"When I graduated from college [in 1984], the factory invoice of a car was locked in a safe... Today, the customer is telling me [what the cost is]."

*Tammy Darwish
Owner, DARCARS*



Balancing Information Asymmetry

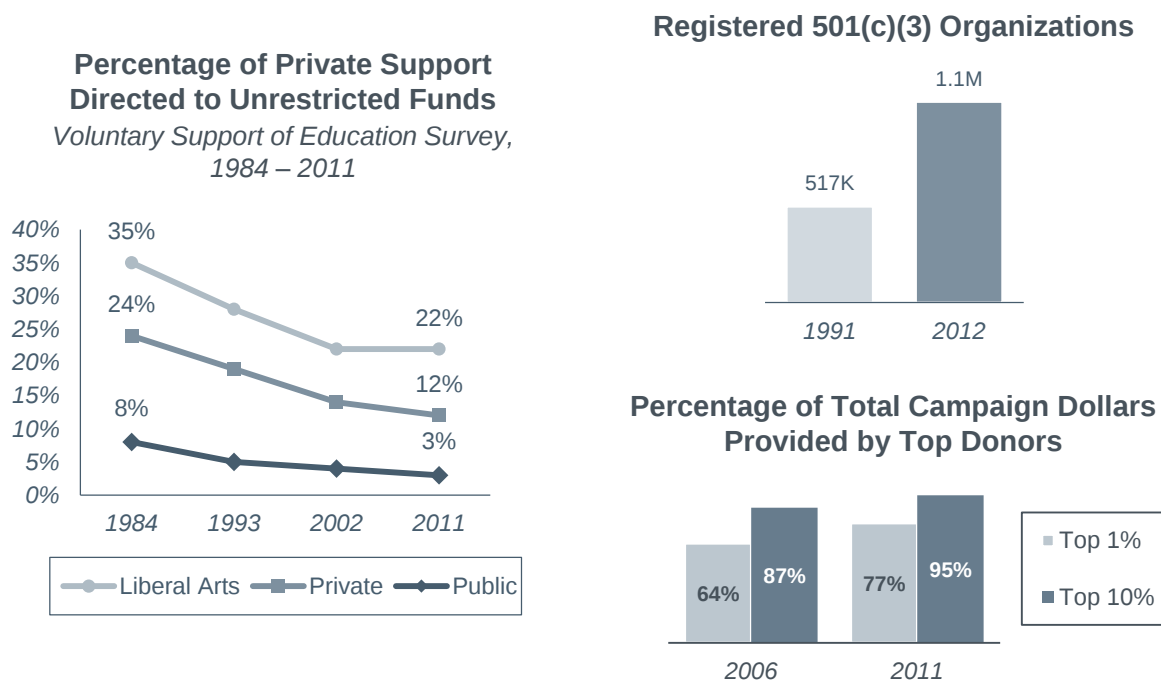
The Transaction Has Changed, But Have the Salespeople?



A Boomer Future

Not Your Father's Philanthropy

Paradigm Shift Seen in Fundraising Landscape





New Donors Want Results

Giving Linked to Clear Case and Measurable Outcomes

12

“

Venture Philanthropists Seek ROI

“Our entrepreneurial background influences our approach to philanthropy...to make our giving more effective, scalable and sustainable. The return on this investment is stronger, more resilient communities.”

Paul Orfalea
Founder, Kinko's (now FedEx Office)

Generational Giving Preferences

Cygnus Donor Survey, 2012

n=11,900

Age	Impassioned Plea	Clear Case for Gift	Measurable Results from Gift
65+	✓		
35-64		✓	✓
Under 35	✓	✓	✓

Source: Burke P, "The Cygnus Donor Survey 2012 US: Where Philanthropy is Headed in 2012", Cygnus Applied Research, Inc., June 2012, <http://www.cygnusresearch.com/downloads/>; Giving USA Foundation, *Giving USA 2013: The Annual Report on Philanthropy for the Year 2012*, Chicago: The Giving Institute, 2013, <http://www.givingusareports.org/>; Orfalea N, Orfalea P. *The Giving Pledge*, http://givingpledge.org/pdf/letters/Orfalea_Letter.pdf.

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Different Times, Different Needs

Paradigm Shift Seen in Fundraising Landscape

13

Then vs. Now

Metric	1980s	2014
Access to Information		
Accountability Expectations		
Competition for Philanthropic Dollars		
Pareto Principle in Gift Pyramids		
Level of Restricted Giving		
Critical Component	Trust	Curated Information

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Source: EAB interviews and analysis.

Gifted & Talented: What Makes a Top Fundraiser?

A Roadmap



14



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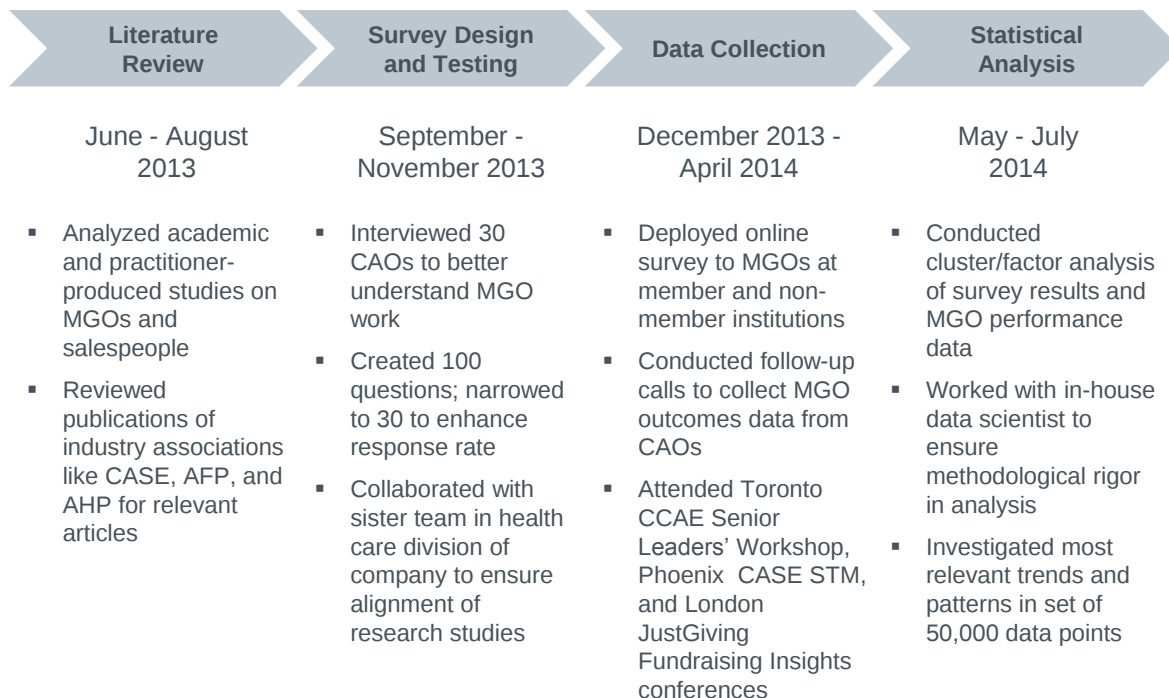
From Humid to Frigid and Back

Gifted & Talented MGO Research

EAB Study Methodology and Timeline



15



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Source: EAB interviews and analysis.



A Focus on Attitude

Survey Instrument Overview



Attitude as a Proxy for Behavior

- Due to the challenges of collecting data on actual behaviors, survey questions focused on attitudes
- Survey instrument collected confidential data to enhance likelihood of truthful responses



Mindset Over Matter

"[We] tracked 20,000 new hires... 46% of them failed within 18 months. But even more surprising than the failure rate, was that when new hires failed, 89% of the time it was for attitudinal reasons and only 11% of the time for a lack of skill."

Mike Murphy
Hiring for Attitude

Sample Survey Statements Tested Importance of...

"Sharing with prospective donors a strong passion for higher education"

"Developing partnerships with faculty members to involve them in cultivation of prospective donors"

"Exhibiting strong intercultural communication skills"

Subjective is Not a Four-Letter-Word

Measuring Performance

How We Chose to Define Achievement

Quantitative Performance Metric

0101
1100
1111

- Relies on data related to asks, visits, close ratio and/or dollars raised
- Does not account for data integrity disparities or relative strength of prospect portfolios
- Non-standardized metric, with different definitions used across institutions
- Time-consuming



Results in a false sense of precision

Qualitative Performance Metric



- Relies on judgment of chief advancement officer
- Accounts for contextual factors (e.g., type of academic unit)
- Standardized metric used at each participating institution
- More convenient for participating institutions



Results in a nuanced, context-relevant view of performance



The Questions We Asked CAOs

EAB's Qualitative Performance Metrics



18

?

Relative Metric of Success

"In the most recent fiscal year for which you have data, based on how your university measures performance, which of your MGOs fall into the **top 1/3**, **middle 1/3** and **bottom 1/3** of *all* MGOs?"

?

Absolute Metric of Success

"In the most recent fiscal year for which you have data, based on how your university measures performance, which of your MGOs **exceeded goal**, **met goal** and **failed to meet goal**?"

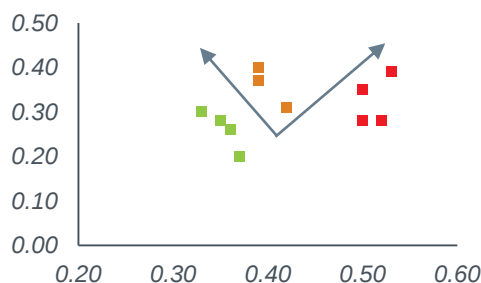
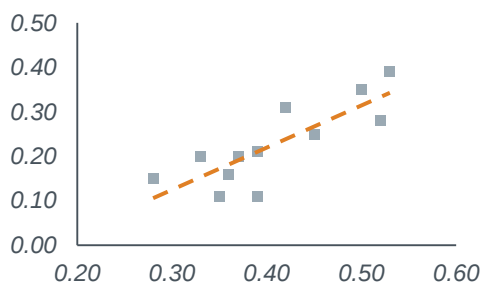
Didn't I Learn this in AP Statistics?

Factoring in the Right Traits

An Examination of Factor and Cluster Analyses as Research Tools



19



Regression analysis is a process for estimating the relationship between a dependent variable (i.e., an outcome measure) and one or more independent variables



Factor analysis summarizes a number of original variables into a smaller set of composite dimensions, or factors

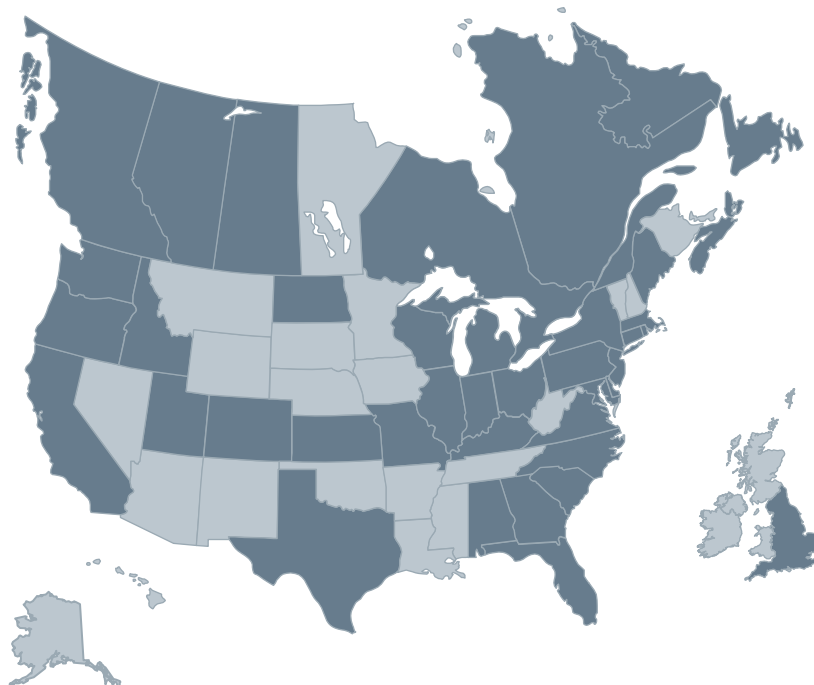


Cluster analysis groups survey respondents together based on patterns in their survey responses



From Coast to Coast and Across the Pond

32 U.S. States, 7 Canadian Provinces, and England



By the Numbers

89

Participating colleges
and universities

1,217

MGO respondents

52,000

Data points generated

\$7.1B

Amount raised in
FY13 by participating
institutions

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Source: Council for Aid to Education, *Voluntary Support of Education Survey*, 2013, <http://vse.cae.org>; EAB interviews and analysis.

Participating Institutions



Research Universities - Private

American University
Boston College
Brown University
California Institute of Technology
Carnegie Mellon University
Case Western Reserve University
DePaul University
Emory University
Florida Institute of Technology
Lehigh University
Massachusetts Institute of Technology
Northeastern University

Princeton University
Rice University
Syracuse University
Tufts University
University of Denver
University of Miami
University of Notre Dame
University of Rochester
University of Southern California
University of the Pacific
Wake Forest University



Participating Institutions (cont'd)



22

Research Universities - Public

Auburn University
Clemson University
College of William and Mary
Colorado State University
Miami University
North Carolina State University at Raleigh
Oregon State University
Portland State University
Rutgers University
Stony Brook University
University at Buffalo
University of Alabama at Birmingham
University of California, Berkeley
University of California, Davis
University of California, Irvine
University of California, Riverside

University of California, San Diego
University of Central Florida
University of Cincinnati
University of Delaware
University of Georgia
University of Idaho
University of Kentucky
University of Maryland, Baltimore
University of Michigan
University of North Carolina at Chapel Hill
University of North Carolina at Charlotte
University of North Dakota
University of Oregon
University of Pittsburgh
University of South Carolina
University of Utah



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Source: EAB interviews and analysis.

Participating Institutions (cont'd)



23

Master's Colleges and Universities

Bellarmino University
Bryant University
California State Polytechnic University, Pomona
Elon University
Emerson College
Iona College
Kean University
La Salle University
Lewis University
Northern Kentucky University
Point Loma Nazarene University
Samford University
San José State University
Southern Illinois University-Edwardsville
University of New England
University of Saint Joseph
University of Wisconsin - Oshkosh
Washburn University

Baccalaureate Colleges

Bucknell University
Vassar College
Whittier College

Canadian Universities

Dalhousie University
McGill University
Memorial University of Newfoundland
Ryerson University
Simon Fraser University
University of Alberta
University of Calgary
University of Saskatchewan
University of Waterloo
Wilfrid Laurier University

UK Universities

Imperial College London
University of Nottingham



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Source: EAB interviews and analysis.

Gifted & Talented: What Makes a Top Fundraiser?

A Roadmap



24



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Colors of the Rainbow

More Than One of a Kind

Profiles of MGOs Through EAB's Gifted & Talented Survey



25



The Cultivator 18% of Sample

- Discovers the interests, values and goals of prospective donors
- Transparent with donors
- Consistently follows up



The Adapter 28% of Sample

- Behaviorally and linguistically flexible
- Stays abreast of faculty research
- Strong intercultural skills



The Academic 18% of Sample

- Intellectually curious
- Skilled at synthesizing information
- Comfortable with ambiguity



The Fixer 14% of Sample

- Understands how work benefits others
- Consistently follows up with prospects
- Works in autonomous fashion



The Lone Ranger 21% of Sample

- Assertive in soliciting prospects
- Motivated by quantitative goals
- Remains emotionally unaffected by either success or failure

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Source: EAB interviews and analysis.



More Than One of a Kind

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Who is a Curious Chameleon?

A Recipe for MGO Success



The Adapter

- Behavioral and linguistic flexibility



The Academic

- Intellectually curious
- Skilled at synthesizing information



The Lone Ranger

- Assertive in soliciting prospects



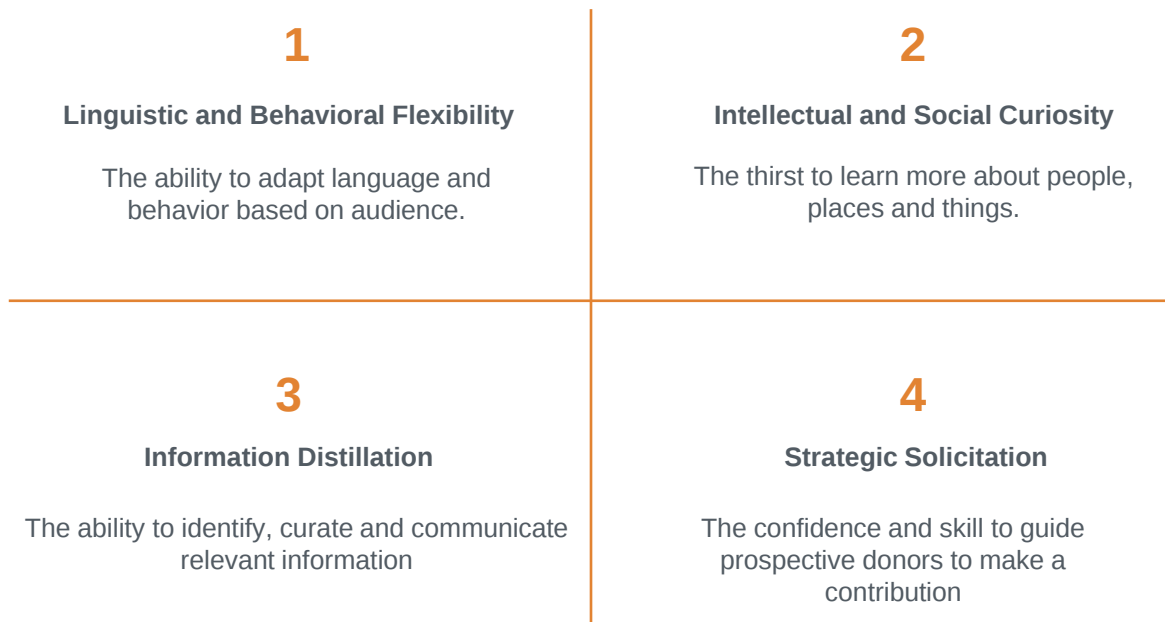
The Curious Chameleon

Connecting the Dots



What Makes a Curious Chameleon?

Key Profile Attributes



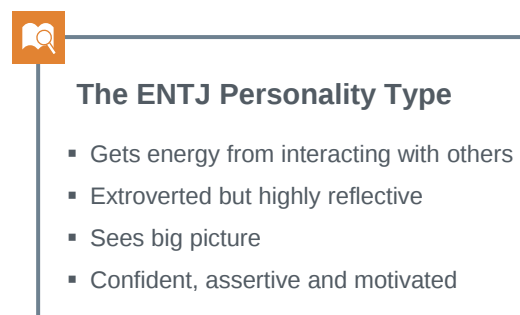
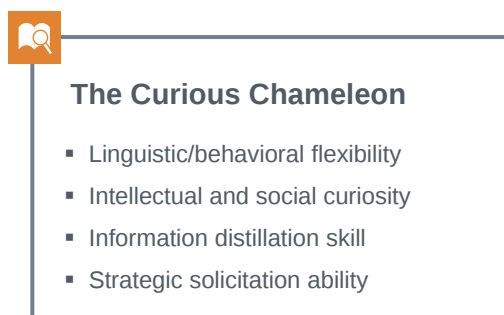
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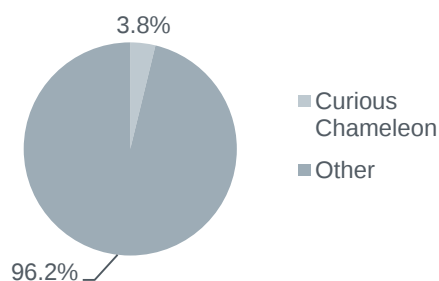
Are Curious Chameleons an ENTJ Avatar?



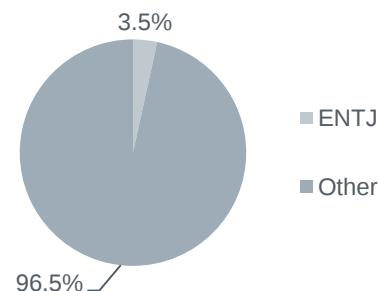
Curious Chameleons Mirror ENTJs in Attributes and Population Frequency



Proportion of Curious Chameleons in EAB MGO Survey



Proportion of Myers-Briggs Types in U.S. Population



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Source: Myers Briggs Foundation, "How Frequent is My Type?", <http://www.myersbriggs.org/my-mbti-personality-type/my-mbti-results/how-frequent-is-my-type.asp>; Psytech Int'l, "Your Type-ENTJ" <http://www.jungtype.com/entj.htm>; EAB interviews and analysis.



Curious Chameleons Outperform Others

49%

Higher odds of being
in the top 1/3 of
performance

78%

Higher odds of
exceeding goal



ENTJs Reign Supreme Among Development Leaders

"I was fascinated by an exercise conducted at the Executive Leadership Institute at the Indiana University Center on Philanthropy. The participants, all senior development officers, completed the Myers-Briggs Type Indicator (MBTI). They were strikingly similar in their profiles; 60 to 70 percent of them registered as ENTJs....The workshop leader later commented that this finding was remarkably consistent with each group of development leaders that took the survey."

*Steve Klingaman
Fundraising Consultant*



Like a Swiss Army Knife

"My shop is very small—my MGOs need to be able to discuss the merits of a complicated planned giving vehicle and then switch gears and talk with a prospect about her profession or work with the dean to put out a newsletter."

*VP, Advancement
Public Master's University*



The Renaissance MGO

"The real gold is someone who's right brain and left brain...People who understand the science of fundraising and get the social aspects of fundraising are hard to find."

*Greg Knedler
AVP, Development
US Air Force Academy Endowment*

Connecting the Dots



32

What Makes a Curious Chameleon?

Key Profile Attributes



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Source: EAB interviews and analysis.

Code Switching All Day Long

More Flexible Than a Yogi



33

Top MGOs Know How to Adapt to Diverse Audiences



Key Attribute #1: Linguistic dexterity is the ability to change language depending on the audience. Behavioral flexibility involves adapting behavior to make individuals comfortable.

Examples in Practice

- Using cultural awareness to tailor approach to prospective donor from Taiwan
- Waxing nostalgic with a retired alumna who wishes to reminisce about her alma mater and then making a compelling 30-minute pitch to a busy attorney
- Working with the dean to host an alumni event and then meeting with a prospect to discuss charitable remainder trusts



Pliability with Prospects

“Flexibility is incredibly important. One of my MGOs might have to meet with an extremely conservative older rancher one moment and a hip artist the next. He or she must be adaptable and perceptive, and have an ability to read the audience.”

*Brett Anderson
Vice President, University Advancement
Colorado State University*

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Source: EAB interviews and analysis.



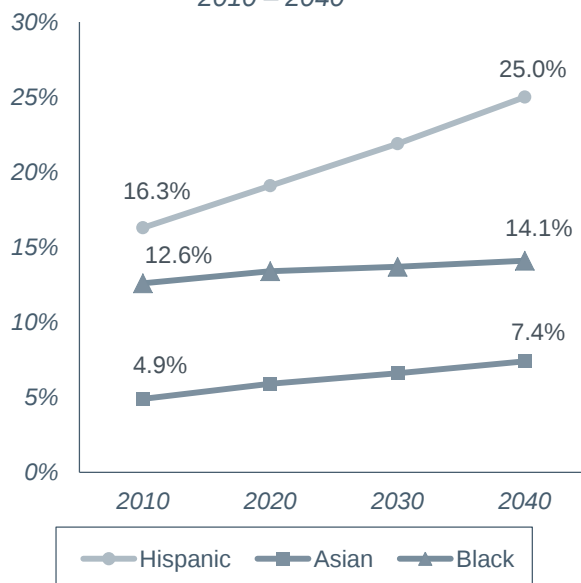
A Demographically Different Future

Major Gift Donor Pool Is Becoming Increasingly Diverse

34

Projected Racial Composition of the U.S.

US Census Bureau,
2010 – 2040



A Larger Slice of the Top 1%

26% Of Giving Pledge signers are ethnic minorities, immigrants or foreign residents

1.46 Rate by which Asian Americans are overrepresented among top 1% U.S. income earners

35K Number of Black American millionaires

Source: "Projections of the Population by Sex, Race, and Hispanic Origin for the United States: 2015 to 2060," 2012 National Population Projections: Summary Tables, U.S. Census Bureau, May 2013; The Giving Pledge, <http://givingpledge.org/>; Dewan S. Gebeloff R, "One Percent, Many Variations," The New York Times, 14 January 2012; <http://www.nytimes.com/2012/01/15/business/the-1-percent-paint-a-more-nuanced-portrait-of-the-rich.html>; Kimbro D The wealth choice: success secrets of black millionaires, Basingstoke: Palgrave Macmillan, 2013.

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Channeling Your Inner Da Vinci

Intellectual and Social Polyglots

Renaissance MGOs Tap into Well of Knowledge with Prospective Donors

35



Key Attribute #2: Intellectual and social curiosity involve a thirst to learn more about people, places, and things.

Examples in Practice

- Being well-versed in the jargon and staying abreast of the practices and people of Wall Street, Hollywood, and Sand Hill Road
- Connecting a prospective donor's comment about board work with an animal advocacy group to cutting-edge university research on lab-grown meat
- Probing prospects by asking thoughtful, insight-generating questions about their goals and interests



The Inquisitive Individual

"My best director of development wakes up each morning and reads *TechCrunch*, *The Wall Street Journal* and *The Chronicle of Higher Education*. She doesn't do this because she plans to strategically use the information she gleans from the publications. She does it simply because she has an unquenchable thirst to learn more."

AVP, Development
Public Research University

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Source: EAB interviews and analysis.



Connecting the Dots

"[I learned about] serif and san serif typefaces, about varying the amount of space between different letter combinations, about what makes great typography great. If I had never dropped in on that single course in college, the Mac would have never had multiple typefaces or proportionally spaced fonts....Of course it was impossible to connect the dots looking forward when I was in college. But it was very, very clear looking backwards 10 years later."

*Steve Jobs
Founder and Former CEO, Apple Inc.*

Turning Grain into Blue Label

Seeing the Forest for the Trees

Top Performance Necessitates Analytical Orientation



Key Attribute #3: Information distillation includes the ability to recognize, curate and communicate relevant information.

Examples in Practice

- Identifying patterns in prospect giving, event attendance and institutional affinity in order to effectively allocate time among prospects
- Synthesizing information from wealth ratings, prospect research and personal observations in order to determine a potential ask range for a gift
- Competently explaining the return on investment a prospect can expect on a gift



Separating the Wheat from the Chaff

"The ability to navigate the flood of information to inform decisions is critical to the success of a major gift officer."

*Ben Tompkins
AVP, Operations
Emory University*



Approaching the Ask in a Strategic Manner

Moving Away from “Friendraising” and Toward More Asks



Key Attribute #4: Strategic solicitation involves the confidence and skill to artfully ask prospective donors to make a financial contribution.

Examples in Practice

- Strategically asking prospect for specific amount for a particular project based on all available intelligence
- Remaining comfortable with silence and the constructive tension it can build
- Handling solicitation rejection without taking it personally



Always Be Closing

“All the identification, qualification, and cultivation in the world isn’t very helpful if it doesn’t eventually result in solicitation. It may sound crass, but the reality is that we’re in the business of raising money, and not simply building relationships.”

*VP, Development
Private Master’s University*

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A Roadmap



1



**Why MGO
Attitudes and
Beliefs?**

2



**Survey Instrument
and Methodology**

3



Survey Results

4



**Implementation
Recommendations**

All the World's a Stage



Dartmouth Uses Role Play to Test Flexibility and Solicitation Skill

40

Exercise Overview

Dick Stone

- Degree: AB, 1990
- Job: MD, UBS Warburg
- Spouse: Lilia Stone (deceased)
- Est. Net Worth: \$10-20M
- Lifetime Giving: \$124K



Activity

Prospect profile review and strategy discussion with two staff members (25m)

Role play with prospect (20m)

De-brief discussion (5m)

Memo to management with summary/next steps (10m)



Tests for...

Intellectual and social curiosity; information distillation skill

Behavioral/linguistic flexibility; strategic solicitation

Self-awareness

Action orientation



"I want to know whether candidates can listen, think on their feet, be creative, and assimilate information quickly."

Cornelia Purcell
Senior Managing Director, Dartmouth College

Pulling It All Together

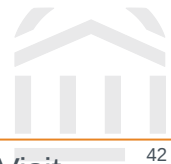


EAB Overview of Profiled Tactics and Associated Traits and Skills Tested

41

Organization	Linguistic and Behavioral Dexterity	Intellectual and Social Curiosity	Information Distillation	Strategic Solicitation
Dartmouth Multimodal Interview	✓	✓	✓	✓

Synthesizing Relevant Data Points



University of Delaware Tests Ability to Write Compelling Email to Secure Visit

42

Exercise Instructions

Draft a 200-300 word email asking “Dr. Potter” to meet with you and discuss his involvement with the University and his giving.



Ascertaining Professionalism and Skill

“In addition to assessing written communication skills, our writing exercise tests whether candidates think quickly and are creative. It also determines whether they can appropriately use information they are given.”

*Beth Brand
AVP of University Development
University of Delaware*

Prospect Information Provided to Candidate



Giving history



Contact history



Biographical details



Additional information from news sources

Pulling It All Together



EAB Overview of Profiled Tactics and Associated Traits and Skills Tested

43

Organization	Linguistic and Behavioral Dexterity	Intellectual and Social Curiosity	Information Distillation	Strategic Solicitation
Dartmouth Multimodal Interview	✓	✓	✓	✓
Delaware Writing Exercise	✓	✓	✓	✗

Northern Arizona's "Show Me" Selection Model



Multimodal Interview Tests Range of Skills



Plan a Visit Itinerary

Candidate plans itinerary after reviewing spreadsheet with prospect wealth ratings, address, and giving history

- Measures **information distillation skill**
- Especially helpful with dispersed prospects



Visit a Prospective Donor

Candidate visits an actual prospect while accompanied by interviewer

- Tests **linguistic and behavioral flexibility and intellectual and social curiosity**
- Opportunity to engage volunteers/trustees in a non-financial way



Write a Contact Report

Candidate summarizes prospect visit and recommends next steps

- Measures **information distillation skill**
- Provides hiring manager with sample of candidate writing and measures candidate ability to glean important facts from meeting and identify next steps.



Create a Prospect Strategy

Candidate develops prospect strategy after reviewing contact reports and giving history

- Measures **information distillation skill**; also determines how the candidate interacts with other staff
- Secures buy-in from other staff members

Pulling It All Together



EAB Overview of Profiled Tactics and Associated Traits and Skills Tested

Organization	Linguistic and Behavioral Dexterity	Intellectual and Social Curiosity	Information Distillation	Strategic Solicitation
Dartmouth Multimodal Interview	✓	✓	✓	✓
Delaware Writing Exercise	✓	✓	✓	✗
NAU Diverse Selection Techniques	✓	✓	✓	✗

Can They Walk the Walk?

True Proficiency Is Often Tough to Ascertain During Traditional Interviews



46



Speaking Like a Fundraiser

"It became very apparent to me that some people can talk really well about fundraising without being able to do it at all...unlike a lot of other professions."

*Betsy Mennell
AVP for Advancement
Northern Arizona University*



Saying All the Right Things

"Some people can get pretty far with the gift of gab. We definitely get people who are very good during the interview, but when the rubber meets the road...it's just not happening."

*Beth Brand
AVP of University Development
University of Delaware*

Assessing Strengths and Fit

Washburn University Foundation Gathers Actionable Intelligence on New Hires



47



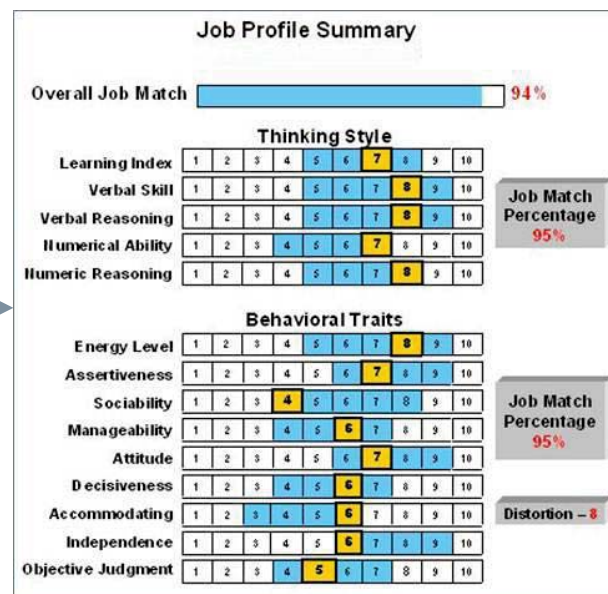
Hiring manager meets with CAO to create ideal profile of individual to be hired



Candidate completes online survey with questions measuring thinking style, behavioral traits and interests



Hiring manager receives candidate report and uses results to assist planning for second interview questions, on-boarding and professional development



Pulling It All Together

EAB Overview of Profiled Tactics and Associated Traits and Skills Tested



48

Organization	Linguistic and Behavioral Dexterity	Intellectual and Social Curiosity	Information Distillation	Strategic Solicitation
Dartmouth Multimodal Interview	✓	✓	✓	✓
Delaware Writing Exercise	✓	✓	✓	✗
NAU Diverse Selection Techniques	✓	✓	✓	✗
Washburn Online Assessment	✗	✓	✓	✗

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Source: EAB interviews and analysis.

HAL 9000 Meets HR

Testing Competence and Cultural Fit

Progressive Organizations Experiment with Online Assessments



49



- Sister company to The Advisory Board Company
- Provides best practice research (and meetings) to CXOs of the Fortune 1,000
- SHL Talent Measurement division develops personality, aptitude, knowledge/skills, and cultural fit assessments



1/3

Proportion of new hires who reported taking an online pre-employment test

\$1B

Size of the employment testing market

30M

Number of online assessments administered by CEB annually

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Source: Halzack S, "Online Tests Are the Latest Gateway to Landing a New Job," *The Washington Post*, 9 May 2014, http://www.highbeam.com/doc/1P2-36029067.html?refid=bibme_hf.

Pulling It All Together

EAB Overview of Profiled Tactics and Associated Traits and Skills Tested



50

Organization	Linguistic and Behavioral Dexterity	Intellectual and Social Curiosity	Information Distillation	Strategic Solicitation
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Delaware Writing Exercise	✓	✓	✓	✗
NAU Diverse Selection Techniques	✓	✓	✓	✗
Washburn Online Assessment	✗	✓	✓	✗
CEB Situational Judgment Test	✗	✗	✓	✗

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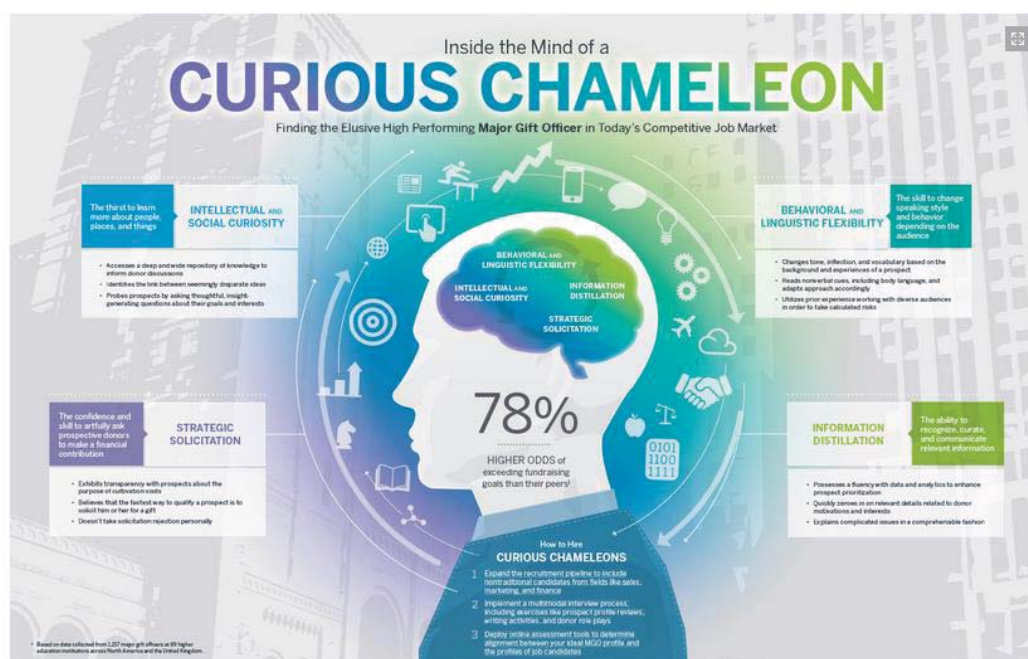
Source: EAB interviews and analysis.

Curious Chameleon Infographic

Available on EAB.com and in Hard Copy Format



51



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Source: EAB interviews and analysis.