



Occupational Solution

Customer Service

User's Guide



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Occupational: Customer Service

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Introduction

In response to customer needs and feedback, Pearson developed the *Occupational: Customer Service* assessment to provide human resource professionals and hiring authorities with a tool to evaluate key competencies for customer service jobs. These key competencies are based on Department of Labor research and industry expert feedback that identified the characteristics required for success in Customer Service jobs.

This User's Guide is organized in four sections:

- ✓ [An Overview of the Assessment](#)
- ✓ [Administration Best Practices](#)
- ✓ [Using Results in Employee Selection](#)
- ✓ [Evidence of Reliability and Validity](#)

An Overview of the *Occupational: Customer Service* Assessment

The typical customer service representative is responsible for maintaining customer or client satisfaction, solving product and services issues, and rectifying problems in a manner satisfactory to both employer and customer. Additionally, a customer service representative must maintain administrative records of his or her activities, communicate on behalf of and negotiate for his or her employer, and maintain a stable and resilient demeanor, even when facing frustrated or potentially hostile customers. The *Occupational: Customer Service* Assessment is appropriate for several customer service positions including, but not limited to:

- ✓ [Customer Service Representative](#)
- ✓ [Account Service Representative](#)
- ✓ [Client Services Representative](#)
- ✓ [Call Center Representative \(Inbound\)](#)

This assessment tool includes Work Styles and Ability tests to predict performance across these types of tasks. The assessment requires approximately 1 hour to complete.

The Ability section provides information about a candidate's ability to perform tasks that require reading comprehension, appropriate vocabulary and grammar, mathematical computation and estimation, and speed and accuracy. The Work Styles section provides information about the match between a candidate's work style behaviors and those required for success in customer service positions. Together, administrative and clerical ability and work style compatibility provide an accurate measure of a candidate's overall job fit.

The *Occupational: Customer Service* assessment Ability section was customized by incorporating portions of the well-established *Short Employment Tests (SET)*, *General Clerical Test (GCT)*, and the *Differential Aptitude Tests (DAT)*. Portions of the *Workplace Personality Inventory (WPI)* have been used to create the Work Styles section. More detailed information on the DAT and WPI may be accessed by logging on to the online testing platform at TalentLens.com. Documents available include:

- ✓ [WPI How to Guide](#)
- ✓ [Development of the WPI](#)
- ✓ [Evidence of Reliability and Validity of the WPI](#)
- ✓ [DAT for PCA Technical Manual](#)

The printed SET and GCT technical documents may be purchased at:

Pearson, Inc.
19500 Bulverde Road
San Antonio, Texas 78259
Phone: 1-800-211-8378
Fax: 1-800-232-1223

Abilities

The Ability section measures a candidate's verbal ability, numerical ability, and speed and accuracy. These abilities play a vital role in occupations that require attention to detail, speed, and specific abilities (e.g., mathematical computation, reading comprehension) necessary to perform essential job functions. Candidates with a high level of abilities (as assessed with the *Occupational: Customer Service*) consistently display speed of perception, momentary retention

of information, and speed of response, as well as the specific abilities of reading comprehension, arithmetic, and standard grammar/language usage.

Verbal Ability contains items measuring basic vocabulary knowledge, reading comprehension, and grammar, punctuation, and capitalization skills. The 40-item Vocabulary portion has a 3 1/2-minute time limit, the 14-item Reading Comprehension portion has a 5-minute time limit, and the 20-item Grammar portion has an 8-minute time limit.

Numerical Ability contains items requiring the examinee to solve numerical problems in a multiple-choice format and to estimate correct answers in order to check calculations. The 16-item Arithmetic Reasoning portion has an 8 1/2-minute time limit, and the 25-item Estimation portion has a 5-minute time limit.

Speed and Accuracy contains items requiring the examinee to locate a name in an alphabetical list and then read and code a dollar figure associated with that name. The 60-item Speed and Accuracy section has a 5-minute time limit.

Work Styles

Table 1 shows the Work Style scales selected from the *Workplace Personality Inventory* (WPI) for the *Occupational: Customer Service* assessment. The WPI is based on a comprehensive taxonomy of important personality-based work behaviors that were classified by the Department of Labor and classified in their Occupational Information Network (O*NET[®]; <http://online.onetcenter.org>). These work style behaviors (listed in Table 1) are required for success, in various combinations, across a wide variety of jobs and industries, and were chosen based on input from human resources professionals from various organizations and on the information provided in the O*NET online database. The WPI also contains an Unlikely Virtues scale, which is used in the *Occupational: Customer Service* assessment to evaluate a candidate's level of impression management. The 126-item Work Styles section is untimed and typically takes candidates about 20 minutes to complete.

Table 1. Work Styles Measured by *Occupational: Customer Service*

Domain	Work Style	Relevant Behaviors
Achievement Orientation	Initiative	<ol style="list-style-type: none"> 1. Takes on job responsibilities without being told to do so 2. Volunteers for new job responsibilities 3. Volunteers for new job challenges
	Persistence	<ol style="list-style-type: none"> 1. Persists in the face of obstacles on the job
Adjustment	Adaptability/ Flexibility	<ol style="list-style-type: none"> 1. Is adaptable to change in the workplace 2. Deals effectively with ambiguity 3. Is open to considerable variety in the workplace
	Self-Control	<ol style="list-style-type: none"> 1. Keeps emotions in check in difficult situations
	Stress Tolerance	<ol style="list-style-type: none"> 1. Accepts criticism 2. Is tolerant of stress caused by other people or situations
Conscientiousness	Attention to Detail	<ol style="list-style-type: none"> 1. Is thorough in completing work tasks
	Dependability	<ol style="list-style-type: none"> 1. Is reliable in fulfilling obligations
	Integrity/Rule-Following	<ol style="list-style-type: none"> 1. Avoids unethical behavior 2. Follows rules and regulations
Independence	Independence	<ol style="list-style-type: none"> 1. Relies mainly on self to get things done 2. Develops own way of doing things
Interpersonal Orientation	Cooperation	<ol style="list-style-type: none"> 1. Is pleasant/good-natured with others on the job 2. Encourages people to work together 3. Is helpful with tasks
	Concern for Others	<ol style="list-style-type: none"> 1. Is sensitive to the needs and feelings of others 2. Identifies with others and demonstrates empathy

Administration Best Practices

The *Occupational: Customer Service* assessment is administered through the online testing platform at TalentLens.com, an internet-based assessment system designed by Pearson for the administration, scoring, and analysis of professional assessments. Candidates' data are instantly captured for processing, and the scores are immediately available in an interpretive report.

Administrator's Responsibilities

The best way for administrators to prepare for the assessment is to take it themselves, complying with all directions. The administrator should ensure that the company's assessment process complies with professional standards and practices, including human resource policies. It is the responsibility of the administrator to ensure that candidates understand the purpose and procedures of the assessment. Before candidates take the assessment, the administrator should explain the nature of the assessment, why it is being administered, the conditions under which candidates are being evaluated, and the nature of any feedback the candidate will receive, as determined by company policy. Though not required for job applicants, Pearson recommends obtaining informed consent from the candidate before the assessment. An informed consent form is a written statement explaining the type of assessment instrument to be administered, the purpose of the evaluation, and who will have access to the data. The candidate's signature validates that he or she has been informed of these specifics.

Administering the assessment takes about 1 hour and 5 minutes total, including giving directions to candidates, answering questions about assessment procedures, and actual assessment time.

Assessment Conditions

The following conditions are necessary for accurate scores and for maintaining the cooperation of the candidate: good lighting; comfortable seating; adequate desk or table space; comfortable positioning of the computer screen, keyboard, and mouse; a pleasant and professional attitude on the part of the administrator; and freedom from noise and other distractions.

Handbags, briefcases, and other personal materials on or near the candidate's work surface should be moved away from the testing area and placed in a secure location. A candidate may

not use calculators, reference materials, books, or notes to take the assessment; such materials must be placed out of reach of the candidate.

Answering Questions

Though the instructions for completing the assessment are presented on-screen, it is important to develop and maintain rapport with candidates. The administrator is responsible for ensuring that assessment-takers understand all requirements and how to interact with the assessment interface appropriately.

Candidates may ask questions about the assessment before they begin taking it. Clarification of what is required of candidates and confirmation that they understand these requirements is appropriate. See the section on “Instructions for Administering the Assessment” for an appropriate script when beginning the assessment.

Explaining the meaning of words or items to candidates must be avoided, as that could lead to inappropriate prompting of candidate responses. If candidates have questions about the interpretation of an item, they should be encouraged to respond to the item as they best understand it. If candidates ask questions while completing the Work Styles section, they should be encouraged to avoid spending too much time thinking about individual Work Styles items. Candidates should be made aware that their quick, reasonably careful, and honest first reactions to the Work Styles items will likely lead to the most accurate information, as specified in the online instructions provided to them.

Instructions for Administering the Assessment

Candidates may use pencils and scratch paper for the Ability section of this computer-based assessment, but they should be sufficiently monitored to prevent their use of calculators or other aids. After the administrator has accessed the online testing platform at TalentLens.com, and the initial instruction screen appears, candidates should be seated at the computer. This recommended script may be read to them at that time:

The on-screen directions will take you through the entire process, starting with some demographic questions. After you have completed these questions, the assessment will begin. The assessment contains two components. The first component is a series of timed aptitude assessments. It will take about 40 minutes to work on this component. The second component is a non-timed Work Styles inventory. Most people finish this component in about 20 minutes. You will

have as much time as you reasonably need to complete this component. The assessment ends with a few additional demographic questions. Do you have any questions before starting the assessment?

Any procedural questions may be addressed at this time. Following the questions and answers, the administrator may say:

Please begin the assessment.

Once the candidate clicks the “Start Your Assessment” button, the first page of the Ability section appears. As long as there is still time left, the candidate may skip items in each Ability subtest, return to them, or review his or her responses before exiting the subtest. After the candidate responds to all items in each subtest or runs out of time and exits, the system locks the subtest and the candidate cannot go back into it. After all Ability subtests have been completed, the candidate can begin the Work Styles section. The Ability subtests are individually timed while the Work Styles section is untimed. Candidates are expected to complete the Ability section in about 40 minutes. Most candidates finish the Work Styles section in about 20 minutes.

If a candidate encounters technical problems while taking the assessment, he or she should be moved to another suitable computer location, if possible, and logged back into the system. If the candidate cannot move to another computer, or if the technical problems cannot be solved by moving to another computer location, contact Pearson Technical Support at 1-888-298-6227 for assistance.

Differences in Reading Ability—English as a Second Language

Directions and items in the *Occupational Solution: Customer Service* assessment are written at or below the 6th grade reading level for the Ability section and at approximately the 8th grade reading level for the Work Styles section. Because a level of reading proficiency in the English language is assumed and reflected in the items, reasonable precautions must be taken when assessing candidates whose first language is not English. Specifically, if a candidate has difficulty with the language or the reading level of the items, note this and consider it when interpreting the scores.

Accommodating Candidates with Disabilities

The Americans with Disabilities Act (ADA) of 1990 requires an employer to reasonably accommodate the known disability of a qualified applicant, provided such accommodation would not cause an “undue hardship” to the operation of the employer’s business.

The administrator should provide reasonable accommodations to enable candidates with special needs to comfortably take the assessment. Reasonable accommodation may include, but is not limited to, modification of the assessment format and procedure, such as live assistance, in which an intermediary reads the online content to a visually impaired candidate and marks their answers for them (Society for Industrial and Organizational Psychology, 2003).

Scoring and Reporting

The score report is available on the online testing platform at TalentLens.com for viewing on screen or printing.

Using Results in Employee Selection

Understanding the Scores Reported

The interpretive report includes percentile scores indicating Overall Fit, Ability Summary, and Work Style Compatibility, as well as percentile scores on each of the Ability subtests, Work Style scales, and Unlikely Virtues. The percentile score is a standardized score that indicates the standing of the candidate relative to individuals in the norm group, a representative sample of similarly employed individuals analyzed during the development of the assessment. The percentile score indicates the proportion of the norm group who possess less of the characteristic than the candidate. For example, if a candidate's Ability Summary score is at the 75th percentile of a given norm group, it means that the candidate scored higher than or equal to 75% of the people in the norm group. A score above the 50th percentile is considered *above average* in comparison to the norm group.

Using the Unlikely Virtues Scale

The Unlikely Virtues (UV) scale should be used to determine whether a candidate's Work Styles scores are meaningful and undistorted. The UV scale contains self-effacing items and higher scores suggest that the candidate is presenting himself or herself in a favorable manner. When an Unlikely Virtues score is excessively high (i.e., equal to or higher than 95% of the standardization sample), the client should interpret the work style results with caution, and focus on other aspects of the selection process, including the Ability section scores and supplementary selection data such as interview results.

Making Selection Decisions

When using the *Occupational: Customer Service* assessment as part of a selection process, it is important to consider how to combine the results from the assessment with other information obtained throughout the selection process. Many organizations use a holistic approach in which the interview, résumé review, assessment results, and other information are considered collectively to generate a comprehensive profile of each candidate. This approach recognizes that multiple predictors typically produce the most reliable and accurate prediction of job performance.

Another popular alternative is to use the assessment as a screener to determine which candidates are best qualified to advance to the next step in the selection process. The advantage of this approach is that it can increase efficiency and reduce the cost and time spent using more expensive selection procedures (e.g., behavior-based interviews conducted by hiring managers) to differentiate between unqualified and qualified candidates.

Pearson does not establish or recommend a passing score (cut score) for the assessment. The client should set appropriate cut scores only after careful consideration of factors unique to their organization (e.g., the supply of talent in the labor market where the organization is located and the client's emphasis and urgency for keeping jobs filled). In general, the higher a cut score, the higher the likelihood of success for candidates who score above the cut score. Arbitrary cutoffs should be avoided, however, as they can introduce adverse impact into a selection process. The best solution is local validation, which involves relating assessment scores with job performance in the client's organization. This step provides the best foundation for interpreting scores and differentiating candidates who are likely to be successful from those who are not.

Monitoring the Selection System for Adverse Impact

Assessment results (scale scores, overall match scores, or any assessment metric used in decision making) should be evaluated for evidence of adverse impact. According to the *Uniform Guidelines on Employee Selection Procedures* (Equal Employment Opportunity Commission, 1978), adverse impact in an assessment is indicated when the selection rate for a protected group is less than 80% of the selection rate for the "majority" group. If a selection system demonstrates adverse impact under these terms, a local validation study showing that the employment assessment tool is equally predictive for protected groups will help demonstrate that the assessment is fair, as outlined by the Equal Employment Opportunity Commission.

Maintaining Security of Results and Materials

Assessment scores are confidential and should be stored in a secure location accessible to authorized individuals only. It is unethical and poor test practice to allow access of assessment scores to individuals who do not have a legitimate need for the information. The security of assessment materials (e.g., access to online tests) and protection of copyright must also be maintained by authorized individuals.

Sources of Additional Best Practice Information

Governmental and professional regulations and guidelines cover the use of all personnel selection procedures. Relevant source documents that the client may wish to consult include the *Principles for the Validation and Use of Personnel Selection Procedures* (Society for Industrial and Organizational Psychology, 2003) and the *Uniform Guidelines on Employee Selection Procedures* (Equal Employment Opportunity Commission, 1978). For an overview of the statutes and types of legal proceedings that influence an organization's equal employment opportunity obligations, refer to Cascio and Aguinis (2005) or the U.S. Department of Labor's (1999) *Testing and Assessment: An Employer's Guide to Good Practices*. Assessment users should consult with qualified legal advisors and human resources professionals as needed to ensure that they understand and adhere to regulations related to employee selection.

Evidence of Reliability and Validity

Reliability—Ability Subtests

The test-retest reliabilities of the Ability subtests are provided in Table 2. The reliabilities range from .70 to .93 for a sample of 53 publishing company employees, retested over an interval of 2–4 weeks. These values indicate that the Ability tests of the *Occupational: Customer Service* assessment have acceptable test-retest reliability.

Table 2. Test-Retest Reliability Coefficients for the Ability Tests (N = 51–53)

Scale	First Testing		Second Testing		Difference	r_{12}
	Mean	SD	Mean	SD		
Vocabulary	24.0	8.2	25.0	8.3	0.12	0.88
Reading Comprehension	6.3	2.9	7.3	3.0	0.34	0.75
Grammar	13.5	4.2	13.2	3.7	–0.08	0.80
Numerical Reasoning	6.8	2.9	7.6	2.6	0.29	0.70
Estimation	11.9	4.7	13.5	5.1	0.33	0.81
Speed and Accuracy	26.4	6.7	28.1	7.3	0.24	0.72
Verbal Ability	51.9	14.1	53.6	14.1	0.12	0.93
Numerical Ability	18.6	6.8	20.9	7.3	0.33	0.81
Overall Ability	88.9	22.6	94.4	23.0	0.24	0.91

Reliability—Work Styles

As presented in Table 3, the Work Style scales coefficient alphas ranged between .71 and .79 (median = .76) for a group of 687 respondents from a variety of occupations and organizational levels. These values indicate that the Work Styles component of the *Occupational: Customer Service* assessment has adequate internal consistency reliability.

Table 3. Alpha Reliability Coefficients for WPI Scales (N = 687)

Work Styles Scale	Number of Items	Alpha Coefficient
Adaptability/ Flexibility	10	0.79
Attention to Detail	10	0.79
Concern for Others	11	0.75
Cooperation	12	0.73
Dependability	9	0.72
Independence	9	0.74
Integrity/Rule Following	9	0.71
Initiative	10	0.77
Persistence	9	0.76
Self-Control	9	0.75
Stress Tolerance	10	0.76
Unlikely Virtues	10	0.76

Content Validity—Ability and Work Styles

In an employment setting, evidence of content validity is demonstrated by measuring competencies that are required for the job. For the *Occupational: Customer Service* assessment, a two-step process was used. First, job-relevant scales for the assessment were identified through interviews with HR professionals in the customer service industry. Second, a review was conducted of the job analysis data provided in O*NET on customer service jobs. This two-step process insured that the items and the constructs measured in this assessment are highly relevant for customer service positions.

As an additional step, we recommend that you compare your job description and other sources of job information to the competencies (Ability and Work Styles) measured by the *Occupational: Customer Service* assessment to ensure that what is being measured is relevant for customer service employees in your organization. It is important to make sure that your position is being described in a manner similar to the typical definition of a customer service role. For legal defensibility, the assessment solution must show relevance for the position for which it is used.

Convergent Validity—Ability

Evidence of convergent validity for the Ability component of the *Occupational: Customer Service* assessment was demonstrated in a study that examined the relationship between the Ability subtests and tests measuring similar domains. Convergent validity relies on data demonstrating that scale scores that theoretically *should* be related to each other are, in fact, related to each other as evidenced by significant correlations. The *Minnesota Clerical Test* was created in electronic format and given to a portion of the standardization sample. As presented in Table 4, the study showed that the *Occupational: Customer Service* Ability tests that require the highest level of detail orientation and momentary retention of information (e.g., Speed and Accuracy and Reading Comprehension) correlated most highly with the *Minnesota Clerical Test*.

Information on additional convergent validity studies for the tests that comprise the Ability section is included in each of the respective technical manuals, which are available at TalentLens.com.

Table 4. Correlation of *Occupational: Customer Service Ability Tests* and *Minnesota Clerical Test (MCT)* (N = 50–51)

Test	MCT Names	MCT Numbers
Speed and Accuracy	.48	.38
Numerical Reasoning	.32	.12
Estimation	.45	.14
Vocabulary	.49	.14
Reading Comprehension	.61	.42
Grammar	.46	.17
Numerical Ability	.43	.14
Verbal Ability	.59	.27
Overall Ability	.60	.31

Convergent Validity—Work Styles

Evidence of convergent validity for the Work Styles component of the assessment was demonstrated in studies that examined the relationship between the 11 WPI scales used in the *Occupational: Customer Service* assessment and personality tests measuring similar domains. A study was conducted between the WPI and the *Occupational Personality Questionnaire* (OPQ; Saville & Holdsworth, 1990) to determine correlations between the two tests. As presented in Table 6, 10 of the 11 scales correlated .50 or better with a similar OPQ scale.

Table 6. Correlations of Work Style and OPQ scales (N = 74)

Work Styles Scale	OPQ Scale	Correlation
Adaptability/Flexibility	Variety Seeking	.68
	Innovative	.53
	Conventional	–.53
	Vigorous	.52
	Achieving	.50

Work Styles Scale	OPQ Scale	Correlation
Attention to Detail	Detail Conscious	.39
Concern for Others	Democratic	.56
	Affiliative	.54
Cooperation	Caring	.54
Dependability	Conscientious	.52
Independence	Variety Seeking	.63
	Conventional	-.61
	Innovative	.50
Initiative	Variety Seeking	.67
	Achieving	.66
	Innovative	.61
	Vigorous	.59
	Conventional	-.54
	Outgoing	.51
Integrity/Rule-Following	Rule Following	.65
Persistence	Conscientious	.56
	Innovative	.52
Self-Control	Tough Minded	.62
	Social Desirability	.54
Stress Tolerance	Tough Minded	.70
	Relaxed	.58
	Worrying	-.56
	Socially Confident	.50
Unlikely Virtues	Social Desirability	.70

Criterion-Related Validity—Ability and Work Styles

Table 5 presents the results of a study showing the relationship between Ability scores and job performance that provide evidence of criterion-related validity. The scores were correlated with supervisory ratings from a subsample of 76 customer service representatives from the standardization sample. The study showed that the validity coefficients for the Overall Fit score (see first row in Table 5) with performance ratings are in the “very beneficial” range (i.e., validity coefficients greater than .35) based on U.S. Department of Labor guidelines (1999). In addition, the Work Style Compatibility score was highly related to supervisor ratings of the potential to advance within the organization ($r = .64$). Overall, this evidence demonstrates that *Occupational: Customer Service* is a valid tool for assisting in the selection of employees who can perform the job and possess the potential to advance. The *WPI Evidence of Reliability and Validity Technical Report* (Pearson, 2007) contains additional evidence of validity based on assessment-criterion relationships for the scales included in this assessment.

Table 5. Correlation of Occupational: Customer Service and Supervisor Job Performance Ratings (N = 31–76 Customer Service Representatives)

Ability Subtest	Single-Item Rating of Potential	Single-Item Rating of Performance	Communication Performance Ratings	Numerical Performance Ratings
Overall Fit	.33	.41	.48	.57
Work Style Compatibility	.64	.32	.46	.20
Overall Ability	.06	.28	.25	.38
Verbal Ability	-.02	.22	.33	.34
Numerical Ability	.01	.22	.19	.35
Speed and Accuracy	.30	.42	.34	.43
Vocabulary	-.09	-.01	.18	.11
Reading Comprehension	.13	.23	.29	.43
Grammar	.06	.33	.38	.24
Numerical Reasoning	.04	.16	.21	.40
Estimation	-.01	.24	.14	.27
Stress Tolerance	.56	.30	.63	.52
Self-Control	.18	.24	.17	.12
Persistence	.53	.43	.36	.21
Integrity/Rule-Following	.30	.14	.41	.04
Initiative	.70	.21	.43	.38
Independence	.03	.19	.15	.20
Dependability	.45	.32	.25	.20
Cooperation	.24	.08	.04	-.20
Concern for Others	.22	.03	.12	-.25
Attention to Detail	.61	.08	.29	.10
Adaptability/Flexibility	.30	.04	.12	-.10

Note. Correlations have been corrected for unreliability of the criterion.

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