

The Personal History: A Second Report

by E. R. SWINT & R. A. NEWTON
The Glenn L. Martin Company
Baltimore, Maryland

OUR INITIAL REPORT on the Worthington Personal History technique was published in the November-December, 1950, *Journal of Industrial Training*. Shortly after that time, we received hundreds of inquiries from Training Directors, Personnel Managers and a surprising number of general management executives.

More recently, there have been inquiries into our subsequent use of the technique, its ultimate cost and value, our measures of validation, etc. There have been "doubting Thomases," and quite frankly we should have been disappointed were none to come forth.

During a recent district conference with representatives of industrial management, we found that questions relative to the Personal History technique dominated the meeting. It was suggested that we prepare a sequel to the original report, which would discuss our further experiences.

Our purpose in presenting this second report is in the interest of improved techniques for selection of persons for training and development in management and other key positions. The initial article created a great deal of interest in some circles about a very touchy subject; doubtless there was thinking that "fools rush in where angels fear to tread." We therefore feel it only fair to set forth something of our later and quite significant experience as a contri-

bution to industrial organizations everywhere which are vitally interested in progressively improving their general personnel practices and administration by upping their averages in the selection of key personnel.

At the time our first report was written, we had studied approximately 250 cases. The results had been so encouraging that we decided, with the counsel and support of our general management, to extend the usage of the Personal History and to tie it in more closely with psychological testing and performance evaluation in our Management Appraisal Program.

We negotiated successfully with the developers of the technique; our agreement has proved very satisfactory and, in many areas, more economical. They agreed to train several qualified people for our company in the analysis and interpretation of the Personal History. This concentrated training was accomplished in Chicago and those trained began immediately to prepare short screening reports. This has resulted in appreciable reductions in both cost and time-span as compared with the situation which obtained when the reports were sent to Chicago for analysis.

An effective quality control over reports written by our people was readily established, whereby one of eight or ten of their reports was sent to Chicago for spot-checking. Periodic visits are

also made to our plant to review and check the work of our staff; when indicated, additional training is given in an on-the-job atmosphere.

We also arranged for local reproduction of a Personal History form carrying The Glenn L. Martin Company masthead. We felt that this was essential to induce active and potential supervisors to accept the form and to identify it with our company. Since the Personal History form markedly resembles a standard employment application, another benefit accrues when we mail the form to a person applying for a key position; its appearance, plus the insertion of the company masthead, identifies the form to these people as an application. This has been especially important, for, as has been true with most industries, our company has been receiving a tremendous number of letters from persons inquiring about key positions. We have used the Personal History technique more and more in relation to these applicants, and a much better screening job "at a distance" has been accomplished than would have been possible with usual procedures.

In June of 1950, The Glenn L. Martin Company's total employment was approximately 7300. By November of 1951 it had grown to 21,000. In June, 1950, we had a management organization, exclusive of officers and directors, of approximately 400. It now comprises some 1100 management personnel. In selecting the additional supervisors, we have followed certain "tested" practices which may be of interest to others. Limitations of space make it impossible to discuss here the functioning of our Supervisory Appraisal Committee, our

various test-batteries, and some of our methods for turning up potential supervisors.

Each department, section, and unit within the company was asked to recommend a person or persons as good potentials for projected supervisory positions. To describe this procedure briefly, these recommendations follow personal interviews by each supervisor with all his subordinates. Following review and approval by the second level of supervision, the findings are forwarded to the Education Department, which administers the Supervisory Appraisal Program. We believe this to be a basic and most important step, for recommendations for promotions should originate with the supervisor in charge of the group, provided, as is the case here, that he is trained and has accepted as one of his major responsibilities the continuous training and development of his subordinates.

The personal interview between supervisors and each employee is now a continuous program; but when it was initiated shortly after our expansion started in 1950, we received more than 600 recommendations for supervisory positions within a four week cycle from the Manufacturing Division, which has accounted for the larger portion of our expansion.

The report form used represents a progressive inventory of some basic requisites for potential supervisors.

In previous years at a time of rapid expansion, this sort of careful systematic interview might well have been called "red tape," or unnecessary; it surely

would not have been accepted as an important initial criterion for promoting men. In short, the circumstances might formerly have worked out like this: John Doe is recommended by Foreman Richard Roe. Richard Roe is a good, experienced Foreman, so we as a Company accept his recommendations with few, if any, reservations. The Personnel Department would probably have checked Doe's record, and if nothing of too serious a nature was turned up, the promotion would have been approved.

This brief digression is important as a background for the facts which we can now reveal about the some 600 recommendations to which we referred previously.

In no manner do we mean to imply that the supervisors who made these recommendations were poorly trained, careless, or guilty of rank favoritism. We know and believe these men to be competent, wise in job know-how, and in general, considerably above the average level of supervisors in the American industrial society. We also recognize that they are subject to extreme "job pressure," that they have had little chance to see beyond what is relatively superficial in a person's basic personality structure, and that they tend to select men who are, in terms of background, seniority and experience, remarkably like what they themselves were some years earlier.

Our analyses of the 600 records, recommendations, test batteries and Personal Histories led us to believe that only 71 of the 600 could be considered good material for supervisory or management positions. We decided that the

situation was promising for the purposes of an additional validation study on the Personal History. In the months which ensued, 80 promotions to supervisory positions were selected for intensive study; all of these men looked good on the basis of the regular selection techniques. In none of the 80 cases did the Personal History finding influence the decision. The 80 were divided into two groups which were approximately equated in terms of education, experience, age, etc. The Personal History analyses of the first group of 40 indicated good supervisory potentiality; the analyses of the second 40 led us to take rather a dim view of their potentialities.

The management performance of these 80 men was carefully evaluated at the end of 60 days, again within six months, and quarterly thereafter. Carefully trained men executed these evaluations. This provided us with a significantly high positive correlation between the Personal History analysis and subsequent performance.

The performance of the 40 men for whom analyses were favorable has been consistently and significantly better than that of the 40 for whom the analyses were not especially hopeful. Seven of the men in the latter group have requested demotion; none of those in the first group has. The evaluators had no specific knowledge of the analyses, so that contamination of data was avoided. Over all, the accuracy of prediction with the Personal History was of the order of 85%.

Within the Engineering Division, our second largest field of activity, with fewer supervisory levels involved, the

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accuracy of prediction was, if anything, slightly higher on the average. It was also less variable. One prediction was of much more than passing interest. Sometime ago, it was necessary to select an engineer to head up one of our larger technical departments. Initially, the selection narrowed down to two men, with another ranked a poor third. We recommended that a thorough Personal History analysis be run on these three, in addition to several other men in the department. Surely enough, the analyses uncovered a darkhorse, a man who had scarcely been seriously considered in the first go-round. He seemed clearly more qualified than the others, and was ultimately promoted to the job. That man has developed truly remarkably, and is today an extremely able administrator. The analysis on the one man who was favored at first for the promotion revealed certain deep-lying factors which were unknown at the time but which have since been demonstrated. It is the firm conviction of the Engineering Management now that, in this single selection case, the Personal History saved the company many, many thousands of dollars in addition to other intangibles.

We have now a thorough and complete Personal History analysis for virtually all of the supervisors active as of June 1950, when expansion began. We have insisted that these be used constructively only, neither to crucify nor to lean upon as a crutch. These men have entered into individual developmental counseling, with extremely gratifying results. On occasion, we have

recommended transfers to other operations; these have quite consistently resulted in better individual adjustment and satisfactions, along with stepped-up personal and group production. It is interesting and significant to note that, handled properly and in an atmosphere of mutual respect and cooperation, the "old timer" supervisors have for the most part responded remarkably well to constructive suggestions drawn from their analyses.

We know that individualized guidance and counseling, using the Personal History analysis as a base, has paid rich dividends. Our supervisors are developing a deeper understanding of and appreciation for themselves, for each other, and for their employees. These dividends are being paid today; it is our sincere belief that the rate of return will pyramid higher in the months and years which lie ahead. This, after all, is what really counts.

WANTED

Six to eight training men in Industrial Engineering or Industrial Management. Areas of instruction include Methods Improvement, Work Measurement, Inventory Control, Production Planning and Scheduling, Organization, Supervision, etc. Applicants must have had teaching experience. Positions pay up to \$8,000 depending on experience and background. Location: the Mid-West. Send complete personal data to:

Box 24, c/o H. Walter Shaw, The Journal of Industrial Training, 330 West 42nd Street, New York 36, N. Y.
