

## Selling the value of occupational psychology

Ian Florance talks to staff at global financial services company UBS

From the room in one of UBS's buildings in Finsbury Avenue I looked across a square, coffee bars and office blocks to a fine view of the 'gherkin' building. The weather was wet, windy and miserable. Fancifully, this could be seen as reflecting the state of the economy and the finance sector in which UBS, with headquarters in Zurich and Basel and activities in over 50 countries, is a major player. But my conversations with John Mahoney-Phillips and members of his Human Capital Performance and Metrics Team had a very different atmosphere: upbeat, inventive, enthusiastic.

### John Mahoney-Phillips

'The application of occupational psychology in business has been limited

by consultants' emphasis on psychometrics and testing. I worked for SHL the test publisher and consultancy for eleven years so I understand testing's value. It's one of the four areas my team covers: Assessment, Performance, Survey, and Metrics and Research.

'Our work includes core consultancy tasks like improving recruitment prediction and reducing risk through psychometrically derived insights. But we moved beyond that. For instance, I am interested in the concept of organisational justice and how it can affect HR processes. If people think they're being treated fairly, they'll be more productive, and be more motivated. Performance appraisal should drive the productive management of people, so the question then arises, "Can you apply principles of organisational justice to that process and

make it more effective?'. We decided to survey the performance appraisal process. The results were fascinating. Performance appraisal effectiveness depends on how apparent it is that managers have looked at an appraisee's self-assessment – heard their "voice" – and

whether the interview is candid. These findings enabled us to shape and focus training.'

I found it extraordinary that John could introduce a concept of justice in what, from the outside, looks like an organisation driven purely by the markets. John's response was that this was the nub for psychologists working in hard-headed businesses. 'You must have a convincing argument couched in business terms, and you communicate it appropriately. Some managers are good with words, others with diagrams or numbers. You have to balance those formats, and if it's a good argument with implementation thought through, you'll be given an opportunity to change and develop a process or approach for the better.'

All of John's team repeated the importance of communicating in business language. They also stressed the importance of strategy in positioning their work. John comments, 'People are intangible assets and our overall aims are to reduce the risks that people pose and to maximise what they return. UBS's leaders understand risk and its reduction and the idea of return on assets.

'Equally, good managers in any sector understand that the only sustainable business differentiation is people and their talents. Any product can be replicated in three to four months. People's skills and creativity are difficult to copy. We need to be innovative in what we do, but there is a real tension with two other imperatives: the need to develop pragmatic solutions and at the same time to reflect best practice.'

John talks enthusiastically about his team's role within UBS. 'We're seven-and-a-bit people who work globally across an organisation with more than 65,000 staff. That's quite deliberate. I keep the team small. It's not operational – we form teams



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with other departments to deliver initiatives and disband them when jobs are over. Virtual teams are critical – they allow us to be small but act quickly and affect performance. Being a small strategically focused team we have managed to stay together and weather the financial storm over the past 24 months.’

John says that UBS are ‘able to run projects over timescales consultants simply can’t enjoy: a three-year change management project got one competency and one performance appraisal framework accepted, for instance. Increasingly we can cross-fertilise areas. For instance, when evaluating HR processes, psychologists use numbers. That’s important but in addition to that how do people *feel* about what’s happened to them. We’re getting people involved in organisational analysis to look at data on people’s attitudes and feelings. A better and more valuable set of metrics will develop out of that.’

Has the financial crisis helped or hindered their work? ‘The old ways of measuring people plainly haven’t worked well. We’re at a fantastic point when occupational psychologists can reinvent what we’re doing in critical areas: board effectiveness and engagement are two examples.’

John teaches at the University of East London and his work at UBS informs his teaching there. ‘Part of the problem with occupational psychology training is the disconnect between academia and practitioners. I use simulations and real data analysis to give students an idea of what it’s really like out here.’

### Richard Bidder

Richard is global assessment specialist for UBS: one person addressing issues with more than 65,000 staff and maybe a million applicants a year.

‘My core role is to write assessments for graduate and intern recruitment each year, ranging from a trading game to simulations and interview questions. The case for using assessment in campus recruitment is very easily made: everyone can see that you need to screen out candidates without the right qualities. Professional recruitment is more challenging – people recruit in different ways with different success criteria. I can’t enforce a single way of doing this, and I can’t quality-control every exercise. So we lay down a basic minimum and offer free interview training online. It’s then a question of working out ways of getting take-up. People don’t like being told “You’re not a good interviewer” so you have to find less direct ways to influence

## FEATURED JOB

**Job Title:** Principal/Senior Consultants

**Employer:** The Keil Centre

**The Keil Centre has a good record of innovation, including recent recognition from the Society’s ‘Occupational Psychology Practitioner of the Year’ awards. The Edinburgh-based psychology, human factors and ergonomics consultancy has an increasing global presence and is looking for a senior psychologist with a strong track record in managing and delivering successful client projects.**

Louise Clarkson, Director at the Keil Centre, tells us: ‘We are at an exciting phase in the growth of our business, and there is scope for someone joining us to make a real contribution to shaping its future direction. There is also potential to acquire equity in the business – indeed the majority of our employees own shares, creating a strong sense of collective purpose and ownership.’

The group employs consultants across the spectrum of applied psychology and ergonomics – from clinical and counselling psychology, through assessment and development to human factors in health and safety. ‘That diversity of expertise, and perspective, creates a dynamic environment, with opportunities to cross-fertilise ideas and applications,’ Louise Clarkson said.

What is the focus of the role? ‘It’s less about selling and more about developing strong client relationships

and really understanding what will add value for them. We are operating in an increasingly global market, especially in human factors, so that can mean quite a lot of travel. Our consultants need to combine the confidence and capability to operate autonomously in delivering projects as well as an enthusiasm about sharing their knowledge and working collaboratively with colleagues.’

I tell Louise that this issue of *The Psychologist* includes a discussion special on ‘occupational psychology in a changing world’. How does she see current political, economic, social and technological conditions impacting upon this role? ‘The need for psychology is not going to diminish as we face turbulent times ahead, but what may change is the need to find new ways to deliver this. We need to continue to be flexible and responsive in our offerings, to keep tuned in to our clients’ needs and remain a step ahead’. Johnny Mitchell, a Chartered Psychologist with the firm, says: ‘The fact that we are still hiring during this period of austerity tells you that organisations are still investing in occupational psychology if it addresses salient client needs. What it means for the psychologist role is that we need to ask the right questions and be listening out for client concerns over this period.’

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“The need for occupational psychology is not going to diminish as we face turbulent times”

them. We’re developing competency-based guidelines for screening candidate CVs at the moment.’

Richard worked in the business side of investment banking for six years with UBS and Morgan Stanley but ‘I wanted to make a career move into something more people-centric and cognitively challenging. I stopped work completely, took a conversion diploma at London Metropolitan University, went back to banking and studied my MSc at Birkbeck in the evenings – and nights! I finally got chartered in February.’

Richard is buzzing about a new project he’s involved in. ‘It’s called Fast Forward and is an intensive job analysis which seeks to answer the question “What is excellent – not outstanding or good, but excellent – performance among client advisers?”’.

Richard echoes John’s key point. ‘We have to work very hard to get organisational buy-in. My challenge now is to develop from someone who achieves success through tactics to being a strategist. John acts as a role model for us in this respect.’

What advice would you give to people wanting to become occupational psychologists? 'Get work experience – it will help you understand real organisational issues and how to address them. Show initiative – for instance get Level A and B qualifications in psychometric testing before you apply for a role in occupational psychology. Try to get a specific area of expertise – SPSS, training, market research. The technical skills you acquire are not your USP. Equally important is the ability to convince people. You have to know theory but that's not much use if nothing results from it. Do everything you can to learn how to get things done in practice.'

### Fiona Pargeter

Fiona's projects come under any of the four key areas, and often overlap.

'My title is HR specialist. I've got good SPSS skills so much of my work is to do with data. It's not just a question of manipulating it – you have to understand it and use it to underpin your case. For example, I identified the key drivers of engagement, showing their link to performance. This was presented to senior management to argue the case for focusing key business actions on these drivers to lead to enhanced employee performance.'

Fiona took her degree at Greenwich. 'Before doing my master's at Surrey I needed to earn some money and temped at UBS. In fact I got an ESRC award so I needn't have worked, but it was good experience and, during my master's, managers at UBS asked me to apply for the graduate programme where I subsequently got a job in the operations unit in the investment banking arm. Over five to six years work in the investment bank gave me business and international experience, which I'd recommend to anyone as a precursor to a career in occupational psychology. I worked in Hong Kong for about 14 months. This gave me invaluable experience of a different culture. When I came back to the UK I worked as a business analyst and implementation manager on an IT project, but by then I wanted to move into an HR role, something that had been delayed. I got a job as junior psychologist in John's team in December 2005.'



Fiona reckons that her career progression would have been faster if she'd stayed with what she was doing, but it was important to finally learn the ropes in an HR role. 'I now work three days a week. I have two children who I love spending time with. In parallel I'm finishing my log book for chartership. So it's very challenging. Then I'm moving into a global diversity group in two weeks, which will allow me to use my HR expertise and international focus to help guide the diversity agenda.' As with John's comments on organisational justice, my uninformed outsider's view found this emphasis on diversity surprising, but Fiona corrected me. 'It's not a reaction to legislation. Inclusive behaviour is seen as critical at UBS. It's good for business apart from anything else. We're focusing on the diversity of an international organisation that already exists – strengthening, leveraging and maintaining it.'

And, if she hadn't taken that temporary job at UBS? 'I'd probably have become an academic.' Did her training prepare her for real life at work? 'No. There was too much theory, not enough practice: I've learnt that on the job. If you haven't got practical experience, get it – do a job for free if necessary. There's a huge learning curve past your formal education. You can't jump into a 'star job': there's almost an apprentice period before you can really start directly affecting your employer's strategy.'

### Peter Wilde

'My degree was in psychology and speech and language therapy, but I'm a market researcher by trade. There's a huge link between psychological measurement skills and those of market research. My remit is to shape a coherent strategy for all internal market research, from engagement surveys to communications audits to diversity surveys. I write the surveys, analyse the data and present the findings to management. When I joined five years ago there was no employee research expertise within the organisation. Writing a survey item correctly is as important and difficult as writing an item in a psychometric test.'

Peter learnt his trade in the 'old school' of market research: '...big employee and policy surveys on paper. New technology has changed things

hugely. You can embed surveys into any HR process and get feedback on opinions and reactions to them as they happen. Rather than waiting for someone to fill in a questionnaire, which they might never do, you can get them to make a choice or press a button at the end of – or during – a process. The technology allows you to number crunch more effectively and quickly. We're looking at disengagement of new employees and how that impacts on later performance, for instance.'

Peter echoes John's opinions of the effect of the recession on the team. 'We've stayed the same size despite the effects of the recession because we've promoted the financial value of what we do.'

Like everyone else I met, Peter is excited about new developments, but perhaps slightly more coy about what they involve in his area. 'There's obviously a lot of interest from external regulators (like the Financial Services Authority). This is not just about pure finance – balance sheets, reserves, etc. – but about how the company is managed. Big questions about the link between performance and pay, for example, are now central. Thinking about how we can use employee research data as a direct measure of management performance is both very exciting and challenging. It's great to be working on something which we hope is going to be central to the company's future.'

### Anna Adams

'John works with students, helping them to find careers. I think the whole team is interested in doing that. We all took very different routes to get here and do jobs that we really enjoy. I can't emphasise enough that you need persistence, creativity and initiative to find the right roles. A lot of students are given unrealistic expectations: there are precious few roles with the job title "Occupational Psychologist" and you're not going to get a really high-profile, high-impact role from day one. But now we're here we're all keen to sell the value of good occupational psychology – that's a large part of our work at UBS.'

So, what does Anna do? 'I lead in the metrics and research area. This is not just about manipulating data, but about measuring the effectiveness of HR practices, providing evidence for initiatives, looking at the implications of research. In fact it's not solely about numbers. Our new metrics for professional recruitment, for instance, don't only look at the usual measures – cost per hire for instance – but at the feelings of the people involved, both the

hiring managers and the candidates. So we collect closed and open-ended reactions to the recruitment process.'

Anna says that when she first started her career, she would not have imagined ending up working in metrics. 'I became fascinated with it when I worked in market research after my MSc. This touches on two key issues about becoming an occupational psychologist. I became an HR generalist between my degree and my MSc. After working in market research I advertised in *The Psychologist* offering free work and ended up working at Abbey in a start-up HR department, designing new processes. I've also worked in consultancy roles. It's absolutely critical to get work experience if you're going to work in or with organisations – too many students lack that. And second, I learn something from everyone I work with. Many managers – especially in HR – have a valuable intuitive understanding of issues we study. So, even if a job isn't titled "Occupational Psychologist", you'll work for and with people in different disciplines, and be able to apply or make sure you learn from the experience of everyone you meet. Occupational psychology isn't so much a single job as an approach that can inform many jobs: you shouldn't apply for a job title but for work that you like and can develop your skills.'

What does Anna enjoy about her work after three years at UBS? 'People come to me now asking me to help them understand what metrics mean. That's great. I enjoy trying to influence strategy. I see what we do as part of business strategy: one day I hope our metrics will appear in the Annual Report alongside financial ones. And, if we're going to provide an excellent service we have to keep up to date with thinking and research. Business sectors and thinking change all the time so we have to change what we're doing.'

## Conclusion

I took a number of things away from these interviews: the importance of working outside psychology if you're going to advise businesses; the fact that recent economic events have a huge impact on how occupational psychology is done; a confirmation that the discipline is changing and needs to change. What struck me most forcibly was that applied psychology is about translation. Training to be an occupational psychologist is about learning one language. To apply it you need to translate it into at least one – and maybe many others.

## Remote but not adrift

The business psychology consulting firm **Zircon** recently won a national award as a 'remote employer'. We talked to them to find out what that involves.

**B**ack in 2000, Dr Amanda Potter, a Chartered Occupational Psychologist and Associate Fellow of the British Psychological Society, saw an opportunity in the field of business and occupational psychology to bring psychologists and HR professionals together as teams. 'I wanted to make use of their diverse skills, and have access to people placed in locations close to clients,' she says. 'Zircon Management Consulting Ltd was born.'

The organisation has developed and grown from a small network of psychologists to a diverse team of 140 consultants, of which seven are employees and the rest are freelance and free to work for other consultancies.

All of the employed directors and self-employed business managers and associates have at-home offices. This model allowed Zircon to create a community of highly qualified professionals who, although independent, wanted to be part of a network. 'The associate world can be very lonely, with little feedback or developmental support,' Potter says. 'We believed that by giving the associates feedback, by understanding their personal situation and by supporting them with their development, the Zircon leaders are better equipped to match their associates to projects. This approach makes them successful because they build strong relationships, have a loyal workforce, who every day make a choice to work with them.'

The benefits of working with an associate workforce include greater access to a variety of expertise, environmental benefits and lower fixed overheads. Potter says that another great advantage is that a remote workforce provides consultants with the autonomy to pick and choose work that plays to their strengths, as well as fitting in with their lifestyle. 'We can put together diverse teams that match the skills required for a particular project, as well as providing a match with the client culture. We have found that our business psychologists and HR consultants value being part of a community, they enjoy the

support and camaraderie from colleagues whilst still having their autonomy.'

However, running and managing any business has its challenges, and in a large, remote business these sometimes appear more magnified. 'Engagement and identity are key when delivering a unified and branded proposition to clients. The key to success is ensuring that we have developed effective ways of communicating with people, not only so people are well briefed for projects, but also to manage expectations, provide information about market conditions, and the type of work in demand. The recent economic downturn has had a significant impact

on the type of work sold, and as a result the number of consulting days associates are required to deliver.

Regular communication in order to manage associate expectations has been critical to the success of our relationships. Being remote means we need to put real effort into engaging with people so they feel a part of Zircon rather than adrift and alone. We organise knowledge-sharing activities and training events to keep associate skills aligned to the demands of the clients and the marketplace.'

Potter believes that the added effort and energy required in managing and working with people remotely is more than compensated for by the benefits of sharing knowledge and expertise and maintaining relationships throughout the network. 'Without the remote team, we would not have the scope to develop and convert our business opportunities. Being successful requires us to adapt to the environment we are working in and make the best use of the resources we have, so that we can develop the most creative solutions that appeal to and enhance our client businesses. As Winston Churchill said, "It's no use saying 'we are doing our best'. You've got to succeed in doing what is necessary." We work hard to make remote working a success, and winning the BlackBerry Remote Employer Award suggested we're getting something right!'

"We can put together diverse teams that match the skills required"