

Executive Development Associates

Connecting ROI and MBTI: A Working Model

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ROI (return on investment) and organizational development utilizing tools like the MBTI ® are like Robert Louis Stevenson's "treasure no yet lifted" in his classic Treasure Island. It is out there. We know it is out there, but it is quite elusive and often forsaken as those who are most apt to find it must also facilitate the development they are trying to measure. However, determining ROI is important and possible.

St. Luke's Hospital & Health Care Network, a Top 100 Hospital in Bethlehem, Pennsylvania, has chosen to commit their time and resources to becoming an "MBTI Organization." That is to say they are making a concentrated effort to build communication and the common language of type as a core competency in the organization.

St. Luke's is taking communication and type well beyond the majority of organizations who use personality and behavior tools. Senior Vice President of Human Resources, Robert Zimmel, initiated this work by inviting 200+ managers to learn about type and to link the language of type into their management and leadership initiatives through the organization. In less than six months, these managers have had the opportunity to attend the following sessions provided by external consultant Bonnie Hagemann as well as internal MBTI qualified leaders:

- MBTI and Communication for Leadership All-day session
- MBTI: Coaching and Conflict Session 2 ½ day sessions for specific teams
- MBTI: Team Building
- MBTI: Lunch Time Workshops
- Team Development using the MBTI
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Furthermore, the senior executive team including, the CEO of the Hospital Network, COO, hospital presidents, senior VPs and other key executives have all engaged by attending:

- MBTI and Communication for Leadership ½ day session
- MBTI Team Building ½ day session
- Executive Coaching, with MBTI as the foundation

As the initiative continues, Zimmel has encouraged the continuation of integrating the common language of type into every leader's daily functioning. Furthermore, the advance Wagner/Weigand ROI Tool will be utilized to gain and analyze data and prove a return on their investment. This ROI proof is far-reaching in that it will not only affect St. Luke's but also provide the necessary data for Organizational Development Departments in other organizations to back their case for increased MBTI internal and external consulting.



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ROI Tool Model:

The Wagner/ Weigand MBTI/ROI Assessment Survey model approaches return on investment using a Socratic method that gathers information from the organization. The "treasure" of the MBTI is lifted from existing work behaviors that are linked to MBTI applications within the organization. While the research is in its early stages, St. Luke's is partnering with the research department of Consulting Psychologists Press to find other healthcare networks interested in providing data and sharing results. A large-scale internal data collection will take place 4th quarter of 2002 at St. Luke's. Once research results are aggregated, a research paper will be written no later than 1st quarter of 2003.

