



# Modeling Excellence with the iWAM



model of excellence

**The Institute for Work Attitude & Motivation**

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## Foreword

The concept and practice of building models are not new. Scientists and engineers have been doing it in the physical world for centuries. Generically, the primary purpose of a model is to see how something will look and/or work in the “real world.”

jobEQ is a “trail blazer” in the development of models to predict human performance. With the creation of jobEQ ([www.jobeq.com](http://www.jobeq.com)) over a decade ago and the online development of the Inventory for Work Attitude and Motivation (iWAM), Patrick Merlevede and Peter Van Damme set the stage for the creation of a powerful application of this unique test.

The powerful application is called a “Model of Excellence.” Essentially, a Model of Excellence based on the iWAM will provide a description of the key motivational and attitudinal patterns that distinguish between high- and low performers in a given role for a specified context.

Other test publishers and their vendors may do versions of modeling. One publisher of a 360° leadership behavior survey, for example, produces a “Best Practices” report. This report is based on the correlation of the leadership scale scores and leadership performance scores generated in the same instrument. The statistically significant correlations provide an organization with an indication of which leader behaviors correlate best (positive r-value) and worst (negative r-value) with performance (defined by the scores on the performance items in the test). This tool provides an indication of “what is,” but does not take the next step of modeling for prediction or improvement.

At least two publishers of personality tests offer models as part of their product line. The major limitation of models based on personality traits is that personality has not been shown to be a significant predictor of performance in a job. In the abstract at the beginning of their article, Murphy and Dzieweczynski said:

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The validity of measures of broad personality traits is still low, personality tests used in organizations are still poorly chosen, and links between personality and jobs are poorly understood. Personality measures are unlikely to achieve the degree of acceptance given to cognitive tests because of differences in the domains, differences in the tests, and differences in the environments in which cognitive tests versus personality tests are developed. (2005, p. 343)

So, how is what jobEQ proposes different? As Elizabeth Barrett Browning wrote about love, “. . . let me count the ways.”

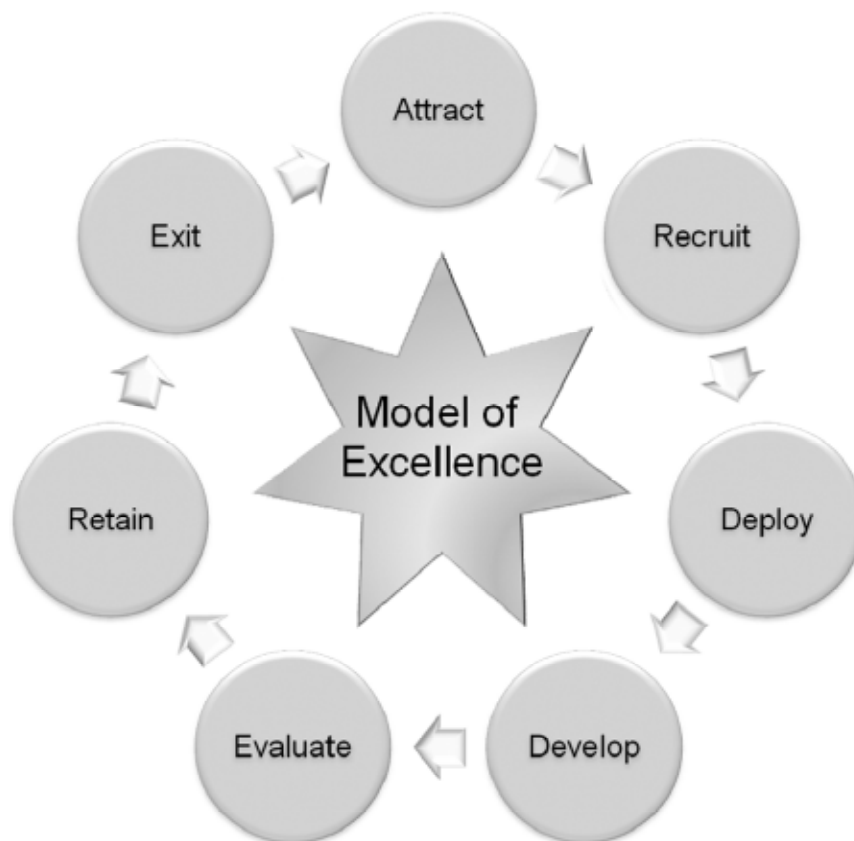
1. The iWAM does not measure traits such as personality or intelligence. It measures something far more powerful in predicting performance—motivational and attitudinal patterns (MAPs).
2. The motivational and attitudinal patterns the iWAM measures are context sensitive; that is, they may shift as the individual moves from one context or role to another. Unlike models based on a broad range of individuals who occupy a variety of roles in different organizations, the iWAM Model of Excellence is based on a specific role in a given context (organization).
3. To be a powerful and usable predictor, an instrument has to (a) measure the “right stuff”, that is, assess something that is actually significantly related to performance and (b) be a valid measure performance. The iWAM meets both criteria.

Motivational and attitudinal patterns, more often than not, will account for a major or majority (e.g. 35-65%) of the variability in performance measures. That’s measuring the right stuff.

As for validity, the Institute recently published Validity and Reliability of the Inventory for Work Attitude and Motivation. This publication summarizes research on and applications of the iWAM across a variety of settings and

roles. Beyond the actual data and statistics are the experiences of thousands of individuals globally who experienced the results of the iWAM assessment and feedback process. The adoption of the tool by hundreds of professionals in their work and by myriad organizations in their hiring and development (e.g., leadership) processes speak to the real value and contribution of the iWAM.

This manual is dedicated to increasing the understanding of the modeling process, the various kinds of models available, and especially the iWAM Model of Excellence. The Model of Excellence can be applied to a wide range of human resource/human performance challenges. Here is an employee life cycle graphic from a chapter by Patrick Merlevede from a book-in-progress.<sup>1</sup>



<sup>1</sup> Patrick Merlevede’s tentative title for the chapter in the upcoming book is “Using NLP-based Tools to Create an Emotionally Intelligent Workplace.”

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The graphic, according to Patrick, represents the fact that a Model of Excellence “can be used to improve each step of the employee life cycle . . .” Further, the iWAM has also been used to build cultural models for organizations by, in some cases, testing 500 or more employees to determine which motivational and attitudinal patterns (MAPs) are typical for the organization.

The iWAM and the Model of Excellence are the keys that unlock the door to improving performance at all levels, in all roles, and in all kinds of organizations. This book will provide some additional insights to what it is and how it works.

Carl L. Harshman, Ph.D.



## Introduction

This preface is dedicated to providing some background on the Model of Excellence concept developed by jobEQ. In the early stages of developing the Inventory for Work Attitude and Motivation (iWAM) test, the founders of jobEQ decided that the real strength of the iWAM in terms of what it measures was in its power to predict how an individual would perform in a job. The typical approach to model building in the field of psychology did not seem to provide the right balance between simplicity and power that jobEQ wanted for the organizations that would employ the iWAM as part of a modeling process. So, they created their own system and techniques for developing a Model of Excellence. The concept of a model and the system for creating models is explained in this manual. It is not exhaustive, but provides a basic overview of the tool, its creation, and the outputs that are used in applying the model to hiring and performance challenges.

### What is a Model of Excellence?

We had heard of “models” and “centers of excellence,” but the term “Model of Excellence” is relatively new to the area of performance in organizations. Essentially, the Model of Excellence is incorporation of the key variables related to performance in a role into a quantitative model. The model provides a means to use the variables data for an individual to determine to what extent the individual matches the variables for individuals who are known to perform well in a role.



Since literally hundreds of variables may contribute to the performance of an individual in a work role, the key is to identify those variables that have the greatest impact on performance and focus on those. If, for example, we know

that five factors will account for about 90% of the variability (prediction) for performance in a given role, there is no real value-added to assess fifteen other variables in screening people for the role. Further, if 3 of the 5 factors account for 80% of the performance rating, then we may want to focus on these three in order to get an overall picture of performance potential.

### **How Do We Create a Model of Excellence?**

A Model of Excellence is created by doing a sophisticated analysis (quantitative and qualitative) of the relationship between performance ratings and variables considered to be critical to performing at high levels in a role. We determine which variables are most related to high performance (versus low performance) and which factors may be "cultural" for an organization or role—that is, factors in which high performers or an entire group in a role differ significantly from a country standard group—and incorporate those factors into a complex formula. The formula will convert an individual's scores on a test or other performance measure into a predictive value.

The formula created for the model is tested against a group of known performers to determine to what extent the model scores correlate with quantitative performance ratings. When the correlation between model scores and performance ratings reaches a level of  $r = .50$  to  $.60$ , the model is considered sufficiently powerful for use in predicting or improving performance.

### **Where Can We Use a Model of Excellence?**



The four primary uses for models would be:

- Leadership Development and Succession Planning
- Performance Coaching
- Recruiting
- Screening Candidates

When the organization knows what motivational and attitudinal patterns (MAPs), for example, are typical in high performers, the information is critical to developing high performance leaders and planning for succession.

In addition, there are case studies in which an organization models excellence in a given role and uses the model to teach managers and supervisors how to coach lower performers to a higher level of performance.

When recruiting candidates for a role, the Model of Excellence provides some clues to key influence language to incorporate into recruiting literature to attract candidates who are more likely to perform well in a role. By attracting those kinds of candidates the organization saves time and money in the screening process in search of the best.

Finally, a Model of Excellence for a role can identify the candidates to interview first. These are the ones most likely to perform well. If the candidates for a job meet other criteria for performance, then the organization increases the chances of finding the “best” candidate. The classification of candidates by group (high-mid-low performance potential) provides the organization with a way to structure screening that gets the candidates most likely to succeed in front of the hiring managers first.

### **Will One-Size-Fit-All in a Model of Excellence?**

No. As seen in the study of motivational and attitudinal patterns (MAPs), the patterns for success will shift from (a) context to context—sometimes the same role reflects different patterns for success in different organizations—and (b) role to role. Research indicates, for example that the MAPs for high-performing top leaders are different from those of department managers. We have found that the patterns for high-performing sales representatives are different in different selling contexts in the same organization.

Presuming that an “industry model” (e.g., utilities, financial, manufacturing) or a “role model” (e.g., executive, sales, customer service) will be suitable across different businesses is probably a mistake. The nature of the business,

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the country or regional culture, and the role are all variables in determining the factors for success. The most powerful prediction comes from creating a specific model for a specific setting or role.<sup>2</sup>

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<sup>2</sup> It is possible, for example, to model leadership in a company and then in subsequent research see if the model varies when applied to different business units or functions (e.g., do successful finance managers differ from successful engineering managers?) and/or to different levels of leadership in the organization. This will help determine if more than one model is needed or if, perhaps, you can “tweak” the base model to fit different contexts or roles.

# Chapter I

## The Model of Excellence: What It Is and How to Do It

Suppose that you are a restaurant chain-hiring manager for locations around the country, or recruiting for a national sales force, or selecting summer staff for a youth organization program. How do you find the best available candidates for the job? Or, for that fact, what even constitutes “the best” for a given role?

Those questions are the basis for our introduction to the Model of Excellence.<sup>3</sup>

### The Framework

A well-known formula from competence management is:

$$\text{Attitude} \times \text{Knowledge} \times \text{Skills} = \text{Results}$$

However, we have seen that more accurately:

$$[\text{Motivation \& Attitudes}] \times [\text{Values, Beliefs, \& Goals}] \times [\text{Ability \& Competency}] = \text{Results}$$

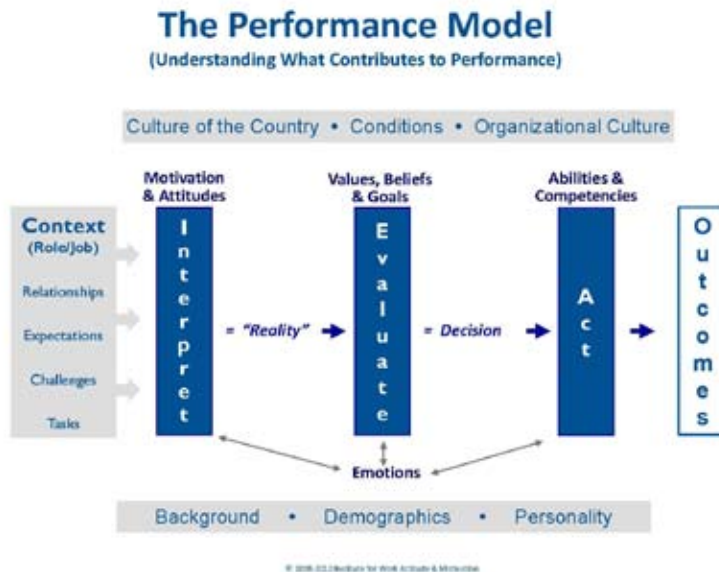
Achieving results always requires some level of knowledge and skills. Knowledge and skills comprise the competencies required to perform. Research shows, however, that just because someone is able to do something does not mean that he or she will want to do it. In terms of finding people who will perform well in jobs, it may be as important to recruit people with the right “wants-to-do-it” work attitudes and motivation as it is to have candidates with the proper range and level of competencies and abilities.<sup>4</sup>

<sup>3</sup> The original work on the framework was done by Patrick Merlevede of jobEQ. We owe Patrick a debt of gratitude for his counsel and direction on the interpretation and application of the model to our work.

<sup>4</sup> We make distinctions between knowledge (knowing) and skills (being) as well as between “abilities” (potential) and “competencies” (capability).

In the current version of the Performance Model, we have made two changes in labels. First, we label the middle variable “Values, Beliefs and Goals” and change knowledge and skills to “Abilities and Competencies” as the third element. The illustration on the next page shows the current combination for the Model of Excellence.

**Figure 1**



Ultimately, the majority of the prediction of an individual’s performance is the result of the interaction among the three central elements of the formula plus “emotions.”<sup>5</sup>

### **What’s Important in Predicting Performance?**

In terms of many hiring models, the factor that receives the most attention is Competency. We look for it in resumes, try to evaluate it in interviews, and try to measure it in assessments.

<sup>5</sup> The word “emotions” in the model equates ultimately to “Emotional Intelligence.”

A second element of the traditional model is the more amorphous notion of “fit.” This is an attempt to assess how well a given person will fit in with the people and the culture of the role and/or the organization.

The third element may consist of values, traits, or characteristics. The job or role, for example, may call for a person who values people or who listens well, or who works well under pressure.

Research on what’s important among all the variables is inconsistent. A recent Harvard Business Review article argued for intelligence (Menkes, 2005), another journal article against broad personality measures (Murphy and Dzieweczynski, 2005), and other authors for the role of emotional intelligence (Merlevede, et al., 2001).

As it turns out, the research on metaprograms and other factors measured by the Inventory for Work Attitude and Motivation (iWAM) yields a correlation ( $r$ ) of .6 to .8. In those cases, the Model of Excellence based on the iWAM will predict ( $r^2$ ) from 36% to 64% of the performance rating.<sup>6</sup>

This level of prediction is equal to or better than the research results of any of the other factors in the formula!

What we conclude from the research, experience, and the existing knowledge base is that competency is a necessary, but not a sufficient condition for predicting the vast majority of high performance in a job or role.

## **From the Performance Model to a Model of Excellence and the Hiring Process**

When approaching the idea of creating a Model of Excellence for an organization we start with a simple, yet often avoided or overlooked concept: all performers are not equal.

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<sup>6</sup> The results are based on the research of jobEQ and Patrick Merlevede in building Models of Excellence for corporations and other organizations. (See jobEQ.com.)

## Modeling Excellence with the iWAM

The whole point of performance management systems is to assess, predict, and improve performance. In this context, the Model of Excellence has two purposes:

1. Determining what variables or MAPs are characteristics of the best performers in a role; and
2. Providing a method and model for identifying existing or potential high performance candidates.

To construct a Model of Excellence, the organization identifies a specific role for which to build a model. Then they provide performance data on a group of high performers and a corresponding group of lower performers. The iWAM is administered to everyone in the role or to select groups of high and lower performers.<sup>7</sup>

The Institute or jobEQ does a statistical and pattern analysis of the similarities and differences between the high performers and their lower-performing counterparts as well as between the profile for the entire sample and the standard group for the country.<sup>8</sup> The former analysis yields the primary content for the Model of Excellence; the latter may contribute to the model, but also helps define the “culture” of the organization and whether it is distinctive in some ways from that standard group. The culture information can be used for orientation, training, and development.

Once created, the Model of Excellence is stored in the jobEQ database and provides the following information when applied to an individual or group:

- a. A quantitative ranking score for each candidate that can be compared to a scale based on performance;

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<sup>7</sup> The number of people assessed is a function of the number of people in the role.

<sup>8</sup> A standard group is a reference group against which an individual’s scores are compared. The most common reference is based upon the country of origin (e.g. U.S. 2007) It is possible however to create a “custom standard group based upon the defined population or sample of people.



- b. A detailed report on each person showing exactly how the individual's MAPs compare to the model (i.e., the profile for high performers and lower performers); and
- c. Some critical questions that can be asked in an interview related to important patterns for which there is individual variance from the MAPs pattern for high performers.

The results of a model analysis can then be used in the specific application for which it was created.

### **Other Applications for Performance Models**

The most cost effective application of a Model of Excellence is for screening large numbers of applicants for a position to decide whom to interview first. There are, however, some additional applications that offers extensive leverage to increase performance—leverage that is not available in any other form.

Once the organization knows which MAPs and ranges of patterns are characteristic of high performers, the information can be used to:

- a. Craft recruiting language to attract people who are more likely to be high performers in a role or context
- b. Coach low performers to increase their performance by Create developmental strategies to help employees adjust patterns that are outside the performance range
- c. Customize coaching and training strategies to fit the patterns that of the target individuals and audience for greater impact.

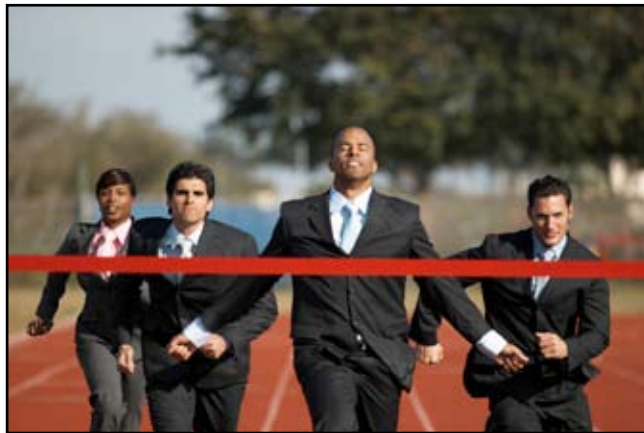
- d. Increase use of tools like the “Clock” which will help the organization deal with retention and burnout issues.<sup>9</sup>

The main point is that once you create a model, there are multiple applications—all of which contribute to increased performance of individuals and the overall organization.

### **Conclusion**

It is interesting that a human construct as powerful as motivational and attitudinal patterns (MAPs) in terms of predicting performance has received so little attention in the larger context of human resource strategies related to recruiting, hiring, development, and performance management, and succession planning.

The good news is that there is a wealth of potential in today’s organizations—profit, not-for-profit, education, and government—for professionals with background in and knowledge to work with MAPs to increase the performance levels of individuals, teams and organizations.



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<sup>9</sup> The “Clock” is a unique device produced by the iWAM that will alert employers to an employee’s preference for the duration of a role or set of responsibilities. It is usually accurate to within a year and provides valuable insight for a manager worried about “burning out” and retaining employees.

## Chapter 5

# Building an iWAM Model of Excellence

### Creating a Model of Excellence

Documented and anecdotal evidence indicates that hiring, motivating, and managing the “right staff” is critical to success. Jim Collins in, *Good to Great*, calls it “getting the right people in the right seat on the bus.” Practical experience indicates that it is becoming increasingly more difficult to match up institutional needs and role requirements with qualified candidates. At best, candidate interviews may give some indications of competencies and reference checks may or may not provide any useful information at all. Nowadays, with the number of resume services and career enhancement consultants, it is difficult to imagine a truly accurate representation of a candidate on paper.

Typically, the hiring organization rarely uncovers any substantive/definitive information regarding the candidate’s attitude and motivation toward their work responsibilities/relationships and, therefore, little is known about the candidate actually will behave in the workplace. Chester Barnard said: “We hire people for their talents but the whole person shows up to work.” Research shows that attitude and motivation—two key yet nearly invisible factors—can predict forty percent (40%) or more in the formula for predicting employee success.

In the case of existing employees who are not performing well or an entire group that is performing at only a mediocre level, it is impossible to find the key to success if we don’t know where to look. Consider the following ideas:

- Intelligence only contributes a certain amount of employee success in given roles;
- Competencies turn out to be a necessary, but not a sufficient, condition for performing well;

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- Personality factors only predict a small portion of overall success potential according to research.

So where do we look to improve our ability to recruit, select, motivate and manage high performers?

The iWAM is designed to identify and measure the two key attributes that make significant difference—Motivation and Attitude. A Model of Excellence helps you put the knowledge about these factors into a practical, reusable application.

### **General Steps in Creating a Model of Excellence are:**



**Step 1.** The organization identifies the role or job for which a Model will be created.

**Step 2.** After validating the organization's existing performance data or by creating a set of criteria to measure and evaluate performance, the organization provides performance evaluation ratings or classifications for a sample of or for all employees to be included in the analysis related to the Model.

**Step 3.** The people selected for analysis are divided into performance groups based on the ratings provided by the organization. The number of groups depends upon the nature of the ratings and the size of the group being studied. High performers are the primary group; remaining employees make up the comparison group or groups.

**Step 4.** The iWAM is administered to the target population. If the existing target group of employees is very large (e.g. more than 100), then the iWAM may be administered to a sample of high performers and a corresponding sample of lower-performing peers.<sup>13</sup>

**Step 5.** After the iWAM data are collected, jobEQ, The Institute, or a licensed modeler performs the statistical analyses and data comparison to determine which motivational and attitudinal patterns distinguish high performers from their peers.

**Step 6.** The results of the analysis are used to create the initial Model of Excellence for the targeted role.

**Step 7.** The results of the analysis are coded into the jobEQ system and the resulting Model is applied to all employees tested to establish the correlation between Model scores and performance ratings (r-value) and the resulting power of the Model (r<sup>2</sup> value). The “power rating” is an indication of the portion of the performance rating that will be accounted for by the motivational and attitudinal patterns in the Model.

**Step 8.** The product of the analysis and any resulting questions are discrepancies (e.g. a high performer who scores average on the Model) are reviewed with the client organization. The results of the review are used to make any critical adjustments in the Model.

**Step 9.** The final, approved Model of Excellence is installed in the iWAM system for use by the client organization in the screening, selection, and performance improvement processes in the organization.

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<sup>13</sup> If the organization wishes to create an organizational profile of the entire functional role and the number is large (50 or more), it may be possible to create a volume price for the iWAM to make it cost effective to survey everyone. In terms of whom to survey, you can develop a model from just contrasting the “high” and “low” performers. Usually, however, according to Patrick Merlevede, it is better to survey all the people in a group to avoid the issue of who’s being tested and who’s not . . . and why. In addition, having iWAM data on all members of the group will provide an excellent resource if the organization decides to use the information for coaching purposes.

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**Step 10.** The organization plans and implements training for staff who will administer the Model of Excellence and for managers and professionals who will use it.

**Step 11.** Leadership of the organization and the HR group create a plan for an annual review and update of the Model.

Current research indicates that there is no more powerful tool for “getting the right people on the bus” or for coaching lower performers to higher levels than a validated iWAM Model of Excellence. Choosing the appropriate model and building it in the right way puts the best foundation in place for having a viable Model in an organization and for improving overall performance and effectiveness in staffing and retention.



## **THE IWAM MODEL OF EXCELLENCE: POWERFUL SELECTION AND RETENTION TOOL**

The Model of Excellence is not just another tool for “tinkering with hiring.” Using the Inventory for Work Attitude and Motivation® it is a powerful, validated system for attracting, screening, and selecting the individuals who are most likely to be high performers in a given role.

*Here are some of the characteristics and benefits of a Model of Excellence to an organization:*

- ✓ The iWAM measures something that other popular assessments do not—specific work-related motivational and attitudinal patterns. These patterns have a direct and powerful influence in how personality, competencies, and emotions impact individual performance.
- ✓ The iWAM provides an objective method and model to increase employee engagement, performance, and longevity.
- ✓ The iWAM can identify reasons for excellent and consistent performance that even high performers themselves cannot articulate.
- ✓ The iWAM Model of Excellence can be applied to recruiting, screening, and selection. Other tools such as the MBTI and DISC are not specifically designed for and have limited utility in employee selection and performance prediction.
- ✓ Even though the iWAM has national standard groups for the U.S., Canada, and several other countries, the Model of Excellence is based on your organization’s top performers!
- ✓ Motivational and attitudinal patterns are context-specific. The Model of Excellence defines high performance for your organization and the performance levels you seek to achieve.



- ✓ You use the iWAM Model of Excellence at the beginning of the screening process to identify the candidates with the greatest possibility of becoming high performers in your organization. This can save thousands of dollars in screening costs by eliminating low potential candidates (even ones who have all the competencies you are seeking).
- ✓ The Model of Excellence will tell you what percent of performance is being predicted by the Model.
- ✓ The Model of Excellence will connect to the screening interview by generating questions to ask candidates who have some patterns that do not match your Model of Excellence.
- ✓ The Model of Excellence has myriad uses. The report on each candidate can be used (a) for orienting the employee, (b) as input to individual development plans, and (c) to provide tips for managing this person for peak performance.
- ✓ You test the power and validity of the Model annually and adjust it to changing needs.
- ✓ It is an extremely cost-effective tool for the value you receive!

### **iWAM Model of Excellence Answers Several Questions**

- “What differentiates top performers from their peers in your organization?”
- “How can we recruit more high performers?”
- “How can we improve the overall performance in our organization?”
- “How can we do more effective recruiting and selection to get the right people on the right bus?”



- “How, with our hiring practices, can we reduce turnover?”
- “How can we increase employee engagement and the tenure of high performers?”

### **Applications for an iWAM Model of Excellence**

- Write your recruiting ads to attract people who are similar to your high performers;
- Pre-screen applicants so that your selection system is dealing with the “cream of the crop;”
- Develop strategies for orienting, coaching, and managing new employees;
- Augment training and development programs to focus on critical performance factors;
- Develop Management and Motivational Strategies to improve mediocre performance;
- Focus Leadership Development efforts in high leverage areas;
- Analyze your culture of high performance.

# **Modeling Excellence with the iWAM**

## **Executive Summary**

One definition of a model is “a simplified representation of a system or phenomenon aimed at describing the system or phenomenon, often mathematically.”

This book is about building models based on motivational and attitudinal patterns (MAPs) to predict excellence in specific jobs in a given context (organization).

The models described in this book are based on the Inventory for Work Attitude and Motivation (iWAM) which was developed by jobEQ. An iWAM-based model—especially the Model of Excellence—is one of the most powerful predictors of performance available today.

### **Three Kinds of Models**

The book describes three kinds of predictive models: Defined, Reference, and Model of Excellence.

The Defined Model is based on logic and experience. This is not a model created from actual performance data. Typically, the Defined model is created by a group of professionals who understand the role and requirements. With the help of an iWAM professional, the group goes through the model building process using the iWAM patterns (MAPs), their experience, and “best guess.” The power of a Defined Model is limited by the fact that it is based on reason only.

The next more powerful version of a model is called the Reference Model. In the Reference Model, the patterns are chosen and high performance ranges are set based on the iWAM scores of a group of high performers. The Reference Model goes one step beyond the Defined Model by using the data available on the group of high performers to select patterns and ranges. Even though

## Modeling Excellence with the iWAM

the Reference Model is based on data from high performers not just on logic, it is still not as powerful as the Model of Excellence because there is no comparative analysis of the differences between high- and low-performers.

The Model of Excellence goes one step beyond the Reference Model by including a statistical and qualitative analyses of the differences between high- and low-performers in the role. The nature and extent of the differences between the two groups, along with something called “Culture Factors,” are the basis for coding the system that yields predictive performance scores and detailed scale-by-scale individual reports for people tested against the model.

### **Other Documentation**

In addition to providing extensive explanations of the different models, this book has sections on the “Metrics of Modeling” and “A Model of Excellence and the Employment Cycle.”

The appendices include a Q&A on models, a sample of model output, how to calculate the investment in a model as well as the return on that investment, and some case studies of models.

### **The iWAM Assessment**

All models are based upon the Inventory for Work Attitude and Motivation (iWAM). The iWAM provides context-based measures of 48 MAPs. The iWAM is available in more than a dozen languages and has a corresponding number of standard groups based on countries around the globe.



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