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Sifting to efficiently select the right service employees



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Service employees in subordinate service roles are crucial for operational efficiency and service quality. By their very nature, these roles are stressful, and as a result, inappropriate selection and recruitment causes high levels of churn—typically ranging from 50 to 100 percent per annum. A combination of this and the proliferation of job boards have created massive problems for HR departments—namely, sifting through hundreds of thousands of applicants. However, this important applied problem has attracted little attention.

The purposes of this article are twofold. First, it highlights the growing costs of recruiting the right candidates to occupy subordinate service roles (e.g., frontline roles such as call center agents, cashiers and wait staff). Second, it offers an alternative approach to recruitment that is more efficient and effective than the traditional approach. The standard hiring process starts with a review of resumes, followed by telephone or face-to-face interviews with the most promising candidates, and then draws on various tests, such as psychometric tests, to determine the applicants with the best fit. This study shows that firms can reduce costs and hire more suitable workers by standing the traditional recruitment process “on its head” and using web-based short and powerful psychometric sifting tests at the start of the recruitment process rather than at the end. Such tests efficiently weed out significant numbers of unsuitable candidates, leaving a smaller, better-qualified pool to undergo the more costly

personalized steps of the recruitment process. In addition, the findings show that the resultant candidates are better suited to their frontline roles than those selected through the traditional hiring process.

THE IMPORTANCE OF FRONTLINE EMPLOYEES AND THEIR RECRUITMENT

Service personnel are part of the operation of any service firm, and thus they can significantly affect the operational efficiency of the service. Frontline personnel serve as the “human face” of services, and their service orientation can dramatically affect service quality. Research has found that “following the script” and merely delivering a service created only 50 percent of satisfactory customer experiences. The balance came from unscripted spontaneous staff behavior. In addition, the strength of relationships between customers and employees is often an important driver of customer loyalty.

The churn of frontline service employees

Frontline service employees have stressful, boundary-spanning roles. Personnel sit on the boundary of the organization and interact with both the customer and those inside the organization, particularly with its policies and procedures. Service employees are responsible for establishing the balance between their two roles: customer contact and as “factory workers.” Such boundary-spanning roles are characterized by

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role ambiguity and conflict, causing conflicts for the employees occupying them. For example, they may be required to convey a role that is incongruent with their self-image or be conflicted with the demands of the customer versus the rules and procedures of the organization. They can even be caught between two customers with conflicting demands—for example, when they are requested by a diner to ask other guests to speak more quietly.

Research has shown that role conflict and ambiguity lead to dissatisfaction, frustration, and turnover intentions. In addition, the ability to cope with such stress depends on the extent to which the employee perceives the role as subordinate. Professional service roles allow people to “defend themselves” from conflict. Unfortunately, the majority of frontline service jobs are “subordinate service roles,” which typically fall on the lowest rung of the organizational hierarchy. Frontline personnel are also treated as subordinates by customers, a role often reinforced by prominently displayed signs and service charters that insinuate that the “customer is important” and/or “the customer is always right.” Therefore, it is hardly surprising that high levels of churn are typical of such subordinate service roles.

The important role of recruitment

Recruitment of individuals is a core part of the HR system in any organization. It is essential for creating an organizational climate and for selecting individuals with the right level of service orientation for a particular role. Researchers found many years ago that individuals have different propensities to serve others. Those propensities are stable over time and can be assessed using psychometric tests.

Service firms are successful insofar as they can create a “climate for service” within the organization. This climate supports the individual within the subordinate service role and mitigates some of the inherent conflicts and ambiguities. HR levers affect the service climate that is the precursor for service excellence. It is the bundles of different HR management practices, rather than individual practices, which have the largest effect.

Recently the idea has been raised that the selection of individuals with the correct level of service orientation can also be a precursor to the creation of a good service climate. Certainly it has been shown that a discrepancy between the levels of service orientation demanded by the role and the inherent service orientation of the individual can itself lead to job stress, dissatisfaction, and other negative outcomes for employees.

The scale of the sifting problem

In 1994, Jeff Taylor registered a website called Monster.com, which was the first job board. Since then, thousands of similar sites have been launched. These boards have had a profound effect around the world in the sourcing of candidates. Job boards have multiplied the number of applicants for each job because of the ease of application combined with a greater catchment area. For example, a recent survey of recruiters in large U.S. companies showed that the average number of applicants per job in the United States was 118. The same survey showed that only 35 percent of these

applicants met the basic education and skills requirement for any given post. The survey suggested that “serial applicants,” or job seekers who apply online to several positions concurrently, were the reason for the high number of poorly suited applicants. Respondents to the survey suggested that the screening of resumes was taking an average of 9.5 h per job and that the large number of submitted resumes was driving significant increases in recruitment costs.

Applicants per job in the United Kingdom have not reached the same level as that in the United States. However, there was an average of 21 applicants per job across all jobs on the leading job board in the United Kingdom, and a high variation occurred among the types of service jobs (see Table 1). For example, in the U.K. call center industry, job boards and web application increased the applicants-to-job ratio from 16:1, before the recession of 2008 to 2009, to 26:1 in 2011. The U.K. call center industry is estimated to employ one million people in a mixture of in-house and outsourced centers. The 2011 level of churn was 46 percent, implying the need to fill 460,000 vacancies per year. Recruitment departments within the industry are therefore screening nearly 26 applicants for each of the 460,000 jobs, which adds up to approximately 12 million resumes per year.

The recruitment cost implications of the churn and number of applicants are staggering. For example, 119,000 sales jobs turned over within the retail network of the Sears Merchandising Group in one year. The cost of hiring and training each new assistant was \$900 (more than \$110 million in total). This sum represented 17 percent of Sears’ income that year. In addition, it only covered the direct costs, and evidence suggests that these direct costs significantly underestimate the total costs of churn. Newly hired staff require time and training to be competent and effective. As such, there is built-in inefficiency in the operations of the hiring company, and new employees are less likely to provide quality service experiences to their customers.

Having an efficient recruitment process is therefore essential to every service organization. Efficiency cannot, however, come at the expense of effectiveness. The recruitment process must select individuals who can cope with the operational and customer service demands of these subordinate service roles. Failure to do so will lead to a vicious cycle of bad service, dissatisfied customers, staff dissatisfaction, high churn in staff, and the need for more recruitment.

A NEW MECHANISM FOR SIFTING

Traditional approaches to screening candidates start with an informal or formal scoring of resumes. This process is itself

Table 1 Customer service role.

Applicants per advertised position in the UK	
Secretarial	41
Customer service	34
Retail	31
Catering	25
Travel and leisure	20

Source: Total Jobs Barometer (www.totaljobs.com 2012).

fraught with problems, due to the growing trend of candidates who embellish their resumes. Kroll International published the results of its background checks of resumes; it found that 42 percent of resumes screened contained inconsistencies between the information provided by the candidate and Kroll's verification checks. Specifically, applicants tended to exaggerate their employment and education history. This is problematic because these embellished factors are often precisely those that weigh heavily in the evaluation of candidates, and especially so when many resumes are screened.

Reviews of resumes might traditionally be followed by telephone or face-to-face interviews. Final short-listed candidates can then be tested using psychometric instruments. The role of psychometric testing on such staff is common and has proven efficacy. For example, research has shown that traditional "service orientation" instruments published by several companies (e.g., CEB Talent Measurement Solutions CCSQ, the Hogan Service Orientation scale, or the PDI Customer Service Inventory) improve the quality of selection for the "human face" role. Such instruments rely on a multi-trait approach—that is, measuring patterns of personality traits (behavioral indicators) associated with good performance in customer service jobs. Because of the cost and inconvenience of paper-and-pencil administration, such tests were traditionally used only on the final short-listed candidates. They compare candidates with a pre-defined competency model that contains a set of behavior patterns proved to predict on-the-job performance.

This process of resume sifting, followed by interviews, and then psychometric testing is inefficient and expensive. Building on advances in Internet-delivered psychometric testing, we propose turning the selection process upside down and starting with psychometric testing. This approach capitalizes on the increased use of online application processes and changes in the tests themselves. The sheer volume of candidates has already produced a change in the application process, in which web-based recruitment workflow systems linked to application sites have become more common. In addition, psychometric tests for service employees have been adapted and validated for web delivery.

At the same time, there has been a shift in the statistical "technology" used in test development. The use of item response theory instead of classical test theory has shortened tests without reducing their ability to discriminate between candidates. The more modern item response theory focuses on the performance of individual items/questions and thereby allows only the questions with the highest predictive power to be selected. All these developments facilitate the use of short tests early in the online recruitment process. Candidates arriving at an application landing pad for a role can be asked to complete tests after providing minimal personal data and before being allowed to submit a resume. Real-time scoring allows candidate applications to be terminated at this point, often with a promise of an early e-mail response, which can be generated by the system. Such an approach offers significant efficiency gains because it can sift out many candidates before their arrival at stages that require manual intervention. Many resumes of applicants who do not meet key requirements are removed early from the recruitment process at minimal costs.

THE EFFECTIVENESS OF SIFTING

For such sifting to be effective, the tests clearly must capture requirements for suitable candidates for the role and reject unsuitable candidates. That is, the odds of good candidates going on to later stages of the process must be improved to offer significant cost savings to HR departments. Service personnel have dual roles. They are part of the production process and thus are "service factory workers," but they are also the human face of the organization. Both dimensions can be used for sifting. We illustrate the effectiveness of the proposed sifting approach with a series of case studies in which sifting has been tested for different purposes, using different sifting instruments.

Sifting for efficiency

The first study involved 136 customer service advisers for a U.K. energy company. Absenteeism is a key operational problem for service firms trying to reduce costs and maintain service quality. Absenteeism has been attributed to role conflict and ambiguity for service roles.

The dependability and safety instrument (DSI) deployed in this study is typical of the new generation of sifting tools and was developed by CEB Talent Measurement Solutions, a leading test publishing company. Dependability, as a personality dimension, has been shown to be an important predictor of various performance dimensions, including keeping time, meeting expectations, and coping with pressure. The questionnaire consists of only 18 statement pairs. Respondents are asked to indicate which statements are "most like me" or "neither." Research has shown that such forced choice scoring mitigates the tendency of candidates to try to project a personality suitable for the job. The test is easy to complete and can be equally deployed through online administration, a simple paper-and-pencil test, or by telephone with no reduction in the quality of the assessment. Scores are classified to allow recruiters to set "cut scores" and reject chosen percentages of candidates at the start of the process.

Longitudinal studies are rare, with tests used for selection and final outcomes assessed many months later. Instead, existing employees are tested, and their performance on different outcomes measures predicted. Each of the company's customer service agents had a known rate of absenteeism as measured from the last 12 months of their employment. The agent was then tasked to complete the DSI instrument. DSI score bands were compared with absences measured during the last 12 months to simulate a sifting-out process. [Table 2](#) presents the results.

Table 2 Absenteeism vs. dependability and safety instrument (DSI) rating.

Sifting for absenteeism			
DSI scores	Zero absences (%)	One or more absences (%)	Odds
Lowest 30%	18	82	1:5
Top 30%	41	58	1:1
Total	39	61	1:2

Using the DSI instrument as a tool to sift out unsuitable candidates by de-selecting candidates with scores in the lowest 30 percent would have significantly improved the quality of the candidates going through to the more expensive stages of the recruitment process. It also increases the chances of advancing applicants with low tendencies for absenteeism. Some good candidates would be rejected, but significant recruitment cost savings would be made. In addition, it is unclear whether those “good” candidates would have been successfully identified and recruited in the traditional process approach. Subsequently, DSI was successfully adopted into the recruitment process of this company.

The second example of sifting on operational efficiency involved 72 drivers in a security company. The DSI scores and a set of service operation measures important to the company were known for each driver. Records were available for the last six months for vehicle accidents for which the driver was held responsible and for attacks during which the driver and his or her team had been the victims. [Tables 3 and 4](#) provide the results.

Sifting out the bottom 30 percent of candidates on the DSI score for accidents would have significantly improved the quality of the candidate pool entering the process by reducing the chances of hiring drivers who would be involved in accidents and be subject to attacks. Drivers with scores in the bottom 30 percent had a 20 percent incidence of accidents (i.e., 1:4 chance of being involved in an accident), whereas those in the top 30 percent had only a 4 percent incident of accidents (i.e., a 1:25 chance).

The results from the observation on actual and attempted robbery attacks to vehicles are just as powerful. Those same low-scoring drivers had a 41 percent chance of being subject to an attack, compared with only 15 percent of drivers ranked in the top 30 percent. Managers suggested that this was due to low-scoring drivers being less conscientious about following the safety and security rules and procedures. Sifting based on the DSI score would have significantly reduced the number of resumes that needed to be reviewed.

Sifting for customer service orientation

With regard to sifting for the all-important “service orientation,” five different studies were performed (again using the DSI instrument) across various industries: hotel, telecommunication, customer service, retail shops, and video outlets. The studies were also performed across two continents: Australia and Europe. Existing employees were tested after six to 12 months in the company. The DSI scores were compared with managers’ ratings of an individual employee’s customer service orientation on a standard scale. Managers

Table 3 Accidents in last 6 months vs. dependability and safety instrument (DSI) rating.

Sifting for operational efficiency			
DSI scores	Zero accidents (%)	One or more accidents (%)	Odds
Lowest 30%	80	20	1:4
Top 30%	96	4	1:25
Total	95	5	1:20

Table 4 Attacks to vehicles in last 6 months vs. Dependability and Safety Instrument (DSI) rating.

Sifting for operational efficiency			
DSI band	Zero attacks (%)	One or more attacks (%)	Odds
Lowest 30%	59	41	1:1
Top 30%	85	15	1:6
Total	74	16	1:5

involved in the rating process had at least six months of experience with each employee.

Pooling the results of more than 300 respondents shows the power of sifting on these key selection criteria. Applicants in the lowest quartile of the DSI score subsequently scored disproportionately lower in manager ratings in terms of their service orientation ([Fig. 1](#)). Sifting them out would have improved the efficiency of the process by only allowing better candidates to proceed to the next round of the recruitment process.

Sifting for overall performance

A large retail chain, with headquarters in the United Kingdom and operations across Europe, the United States, and Asia, wanted to open new stores in each geographical region and improve the productivity of the store-opening recruitment process. To achieve this, situational judgment tests (SJTs) were used for effective and efficient sifting. These tests used descriptions of real-life workplace situations to which respondents were asked to choose an appropriate response. SJTs are effectively low-level simulations.

Since their introduction, a large body of research has suggested that SJTs are valid and have many practical uses. Much of this work has focused on using SJTs to predict success in a job. Recently there has been growing interest in using SJTs to measure different constructs. To develop the SJT for this project, workshops with store managers were carried out to develop job-specific competency profiles. [Fig. 2](#) shows an example of such job-specific competencies developed for this project.

Groups of store managers were asked to identify specific examples of good and bad customer service and to describe them in the form of scenarios. A different group of managers then rated the scenarios on whether they illustrated a particular competency from the competency profile. The results were combined to develop a test with 17 scenarios to be rated. Such scenarios can be presented as text, videos, or avatar graphics. In this case, a simple text description was used (as an example, see [Fig. 3](#)). Such questions can avoid adverse impacts arising from discrimination on race, gender, education, and so forth.

A sample of 342 staff members from three continents completed the instrument. At the same time, they were rated by their line managers on the same set of competencies. The results appear in [Table 5](#) in the form of simple correlations.

Using the overall performance rating as the key criterion variable to demonstrate the power of sifting, [Fig. 4](#) shows the relationship between performance and the quartiles of the SJT. The results show that sifting out the bottom quartile of

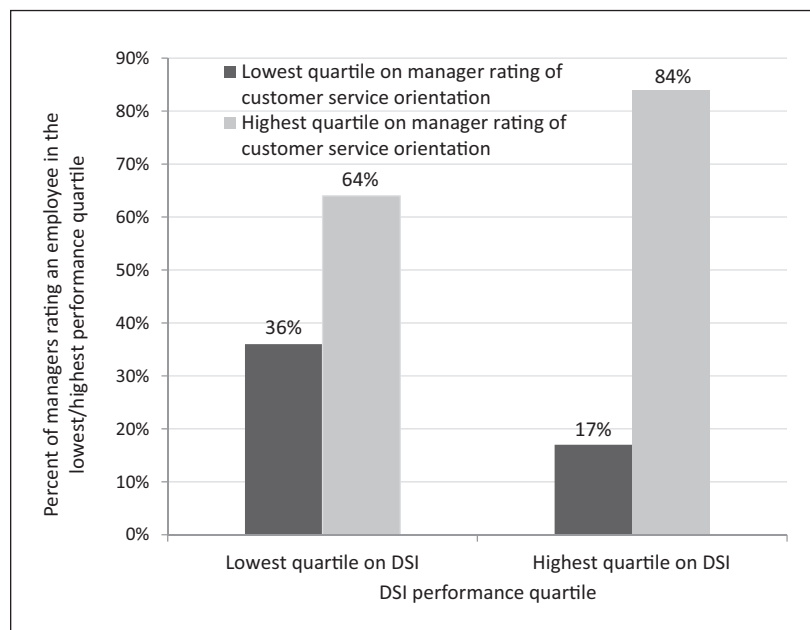


Fig. 1 Sifting for customer orientation using the dependability and safety instrument (DSI).

scores would remove a significant number of unsuitable applicants and improve the quality of the resultant pool. For example, 63 percent of candidates in the bottom quartile were rated as low performers by their managers, compared with only 4 percent of those rated in the top quartile on that test.

The sifting tool was subsequently deployed as part of the recruitment process for the opening of a new store. Removing the bottom quartile of candidates before reviewing resumes saved managerial time by improving the quality of the candidates going through to the later stages of the process. The SJT reduced the ratio of manager interviews for a successful hire from 6:1 to 2:1. This resulted in a savings of approximately 73,000 h of management time, representing a \$1.8 million cost saving on setting up a new store.

HOW TO DEVELOP AN EFFECTIVE SIFTING TOOL

We next detail the steps involved in developing sifting tools so that service firms can determine whether to use this

approach. Many of the steps are the same in the traditional recruitment process, but some have a different orientation, as we discuss next in the four steps of developing effective sifting tools.

Step 1: Development of a job profile

The first step is to create a suitable competency profile for the role. This defines, in terms of competencies, the key behaviors that would be needed in the role. This should be standard practice in any rigorous recruitment process.

A sifting test requires only that the competencies being sifted are validly a minimum requirement for the role. As sifting is part of the total recruitment process and should not be used alone, it is more practical to develop a full profile and, within that, to select the sifting competencies.

The time needed in this stage of the process depends on the importance of the role, and the legal and regulatory environment surrounding discrimination in this role, industry, or country. At its simplest, managers or subject matter experts can be asked to undertake an online card-sorting

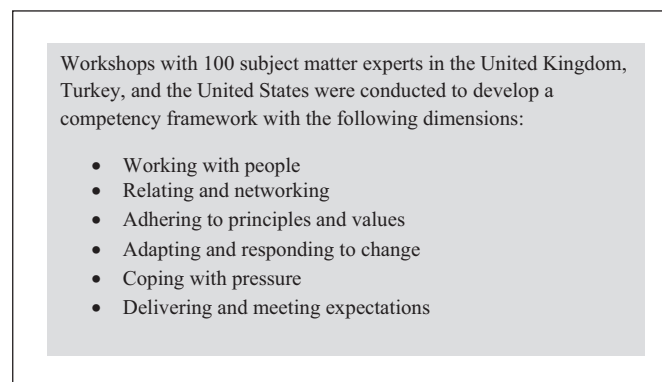


Fig. 2 Competency framework for service employees in a supermarket chain.

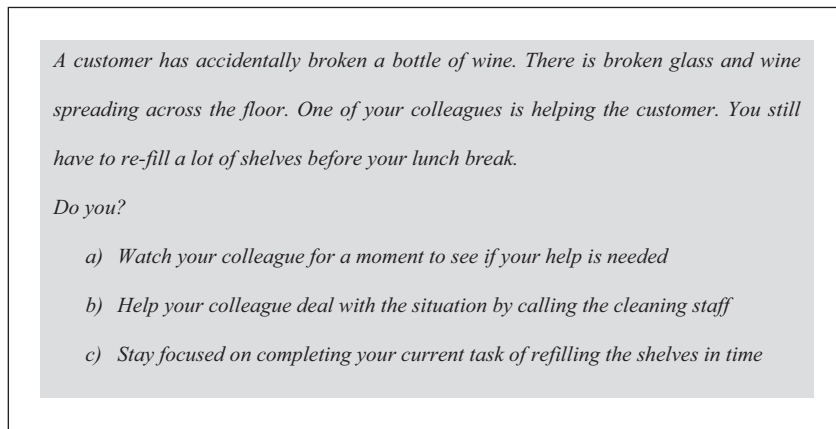


Fig. 3 Example of a situational judgment test (SJT) for a supermarket chain.

task based on a standard set of universal competencies. Several organizations (e.g., CEB, DDI, Hogan, and PDI Ninth House) have developed universal competencies using empirical data that suggest that all roles can be captured with the same set of competencies. Roles vary only in the selection of competencies and the weights given to them. Human resource experts select the relevant competencies for the role—their results are pooled to create the final profile. At its most complex, job profiling can involve an outside consultant, interviewing and testing employees, and developing customized competencies and the profile. The latter may take several weeks to complete.

Step 2: Choosing screening competencies

Unlike traditional job profiling, the purpose of screening is to select one or more competencies on which to select *out* candidates. In some financial services roles, such customer contact center employees or tellers, for example, numerical reasoning ability is an absolute minimum requirement. It is therefore possible to select out on the basis of a simple reasoning test that previously might have been used much later in the recruitment process. A screening system can therefore be established using a standard numerical reasoning test for the appropriate educational level of the candidates.

Step 3: Deciding on the degree of customization for the assessment

The next major step is determining the extent to which standardized instruments can be used or whether it is necessary to develop unique ones. Common standardized instruments are published by major suppliers (e.g., CEB Verify Series of Ability Tests, the CEB Customer Service Solution, the IRIS SJT Test Series) and come with validation studies and a large list of standardized norms with which candidates can be compared. However, such standardization runs the risk that these instruments are not specific enough for the role or context.

In contrast, customized instruments can be developed to fit the role and context exactly. Such tests, however, must be carefully validated against large samples of candidates and, even then, might not allow comparison against a large group of norms with which candidates can be compared. Customized test development is clearly a long and expensive process, and generally only done for specific and high-impact roles requiring the sifting of many candidates.

The U.K. supermarket chain example used a set of competences selected from a universal competency framework, but the actual scenarios were customized to the specific context of the supermarket to be opened. Such a level of customization allowed for cultural differences between countries where the test was to be used.

Table 5 Correlation coefficients between employees situational judgment test (SJT) scores and managers' ratings of employee performance.

Employee's competencies	Manager's ratings of employee performance				Sample weighted average $n = 342$
	UK1 $n = 70$	UK2 $n = 78$	Turkey $n = 93$	U.S. $n = 101$	
Working with people	.38	.35	.31	.25	.32
Adhering to principles and values	.18	.28	.55	.21	.32
Relating and networking	.52	.37	.36	.29	.38
Meeting customer expectations	.28	.46	.22	.26	.30
Adapting to change	.19	.38	.26	.32	.29
Coping with pressure	.18	.38	.43	.10	.28
Overall job performance	.40	.47	.36	.28	.37

Note: In the Turkish and U.S. samples, the managers' ratings were concurrent (i.e., current employees completed the SJTs and were at the same time rated by their managers). In the two U.K. samples, the ratings were predictive (i.e., employees completed the SJTs, and managers rated their performance six months later).

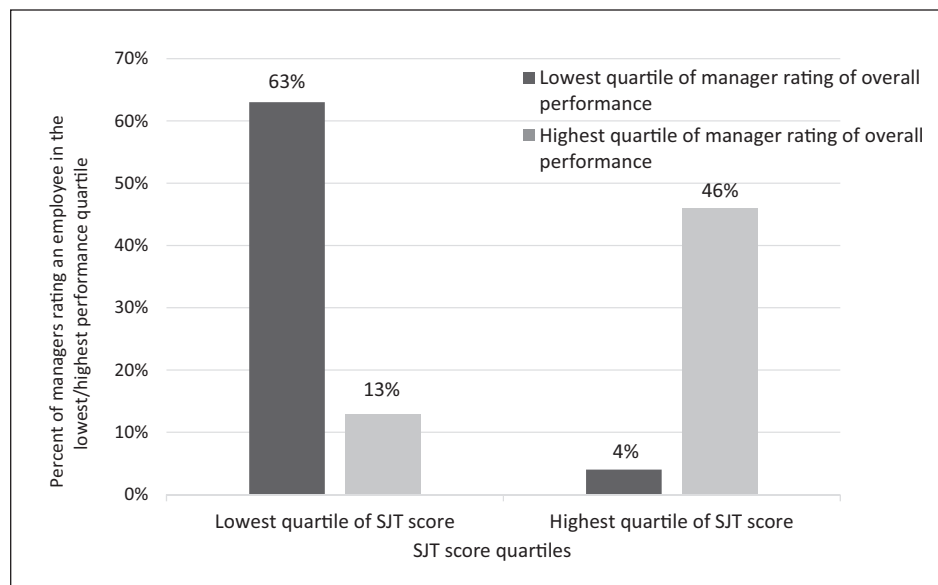


Fig. 4 Differences in overall performance by SJT rating.

An alternative approach would have been to use standardized SJTs that have been developed for customer service roles. These require much less time, effort, and cost to develop but are obviously only applicable for generic roles. For example, the range of IRIS SJTs (see www.talentlens.co.uk/select/iris-situational-judgement-tests) covers many different roles, including customer service, and uses written scenarios to describe the situations.

Step 4: Choice of questionnaires or SJTs

The choice of whether to use a questionnaire or an SJT for a particular role is mostly based on cost and convenience, since the quality of the results is largely the same. SJTs offer more realism for the candidate but are less efficient as measuring tools. As a result, candidates may need to spend more time for the same amount of selection data to be generated. Furthermore, if sophisticated video or avatar simulations are integrated into SJTs, candidates must have computer access and sufficient bandwidth. SJTs, especially if customized, are expensive to deploy and, for certain roles, may not be worthwhile, and therefore questionnaires would be the preferred sifting tool. Especially for low-level roles, the cost of selection and the time taken for the selection process must be weighed against the cost of a poor hire.

CONCLUSIONS

The growth in job boards and the global economic slowdown have dramatically increased the number of candidates apply-

ing for service roles. There is a veritable tsunami of applicants swamping service companies that advertise a customer service job opening. Recruitment departments must continue to hire large numbers of staff to fill vacancies created by the high levels of churn that characterize these jobs.

Traditional recruitment processes are put under severe strain when trying to tackle this problem. However, by standing the traditional recruitment process "on its head" and using web-delivered, short, powerful psychometric tests at the start of the recruitment process, efficiency can be significantly improved.

Efficient and effective psychometric sifting tests require careful development that can incur significant upfront costs. These development costs mean that a critical volume of hiring decisions is a prerequisite for the suggested approach to be cost-effective. However, as described in the development process, this approach is relatively straightforward, and the time, effort and money that need to be invested are under the control of the HR department.

Organizations used to deploying psychometric instruments are already familiar with the issues involved. Those that are not may well need professional advice in setting up the screens. In either case, the potential benefits are significant. There are large potential recruitment cost savings in such deployment, and the results of our study suggest that the process will also produce excellent short lists of potential employees.



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