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SCREENING THE MANAGERIAL APPLICANT: A DESCRIPTIVE  
PHENOMENOLOGICAL STUDY OF RESUME REVIEW AND EVALUATION

by

Gregory Edward Higgins

A Dissertation  
Submitted to the Graduate School,  
the College of Arts and Sciences  
and the School of Interdisciplinary Studies and Professional Development  
at The University of Southern Mississippi  
in Partial Fulfillment of the Requirements  
for the Degree of Doctor of Philosophy

Approved by:

Dr. Dale L. Lunsford, Committee Chair  
Dr. Cyndi H. Gaudet  
Dr. Heather M. Annulis  
Dr. Patricia P. Phillips

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Dr. Dale L. Lunsford  
Committee Chair

---

Dr. Cyndi H. Gaudet  
Director of School

---

Dr. Karen S. Coats  
Dean of the Graduate School

May 2019

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## ABSTRACT

Resume screening is among the most frequently used hiring methods in U.S.-based organizations (Behrenz, 2001; Wilk & Cappelli, 2003). While little research has been conducted to establish its validity (Russell, 2007), 90% of hiring personnel in the United States use some form of resume screening to eliminate job applicants during the hiring process (Boatman & Erker, 2012). Researchers have noted that the use of resume screening is a likely source of hiring errors (Robertson & Smith, 2001) that have a range of negative impacts on organizations including loss of revenue, damage to the organizational image, lowered employee morale, customer dissatisfaction, severance and legal costs, and sunk costs of supervision and training (Abbassi & Hollman, 2000; Careerbuilder, 2013; Robert Half, 2013; Sutherland & Wocke, 2011).

While resume screening is used widely among employers for all job classes, the primary focus of the extant research on the method focuses on hiring recent or impending college graduates (Brown & Campion, 1994; Burns, Christiansen, Morris, Periard, & Coaster, 2014; Cole, Rubin, Feild, & Giles, 2007), a population that only represents 7% of all job applicants (Rynes Reeves, & Darnold, 2013). The lack of insight into the resume screening process used when hiring experienced job applicants, including managers, likely results in hiring errors and prohibits employers from making informed decisions when attempting to improve hiring processes.

The purpose of this study was to describe the resume screening process used by employers when hiring managerial job applicants. The study used the descriptive phenomenological method, a qualitative research approach that has been previously used in the psychological and organizational development research domains.

The study found that human resource (HR) personnel utilize resume screening as an integral part of the hiring process for managers. Further, the criteria used to assess managerial applicant resumes are distinct for recent or impending college graduates. This study also documents the idiosyncratic approaches used by HR personnel in developing resume screening paradigms used when assessing managerial job applicants. These results may be used by employers to improve hiring processes used for managerial job applicants through selection method modifications, standardization, training, and system utilization.

## ACKNOWLEDGMENTS

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## DEDICATION

For Tucker.

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## CHAPTER I - INTRODUCTION

Job demands of the 21st Century differ significantly from those of the 20th Century (Cascio & Aguinis, 2008; Dries, Vantilborgh, & Pepermans, 2012; Pink, 2005; Silzer & Church, 2009; Trilling & Fadel, 2009). Economic trends such as continued automation, outsourcing, information technology utilization, globalization, and environmental concerns have changed the nature, content, and environment of work (Florida, 2004; Lawler, 2008; Moretti, 2012; Viswesvaran & Ones, 2010). Unlike the 19th or 20th centuries when industrialization and natural resource exploitation were central to economic success (Walton & Rockoff, 2010), talent is now the most-valued commodity in the world (Cascio & Aguinis, 2008). The need to attract, motivate, and retain talent is a formidable challenge to U.S. businesses and impacts national competitiveness (Cappelli, 2008; Wooldridge, 2006). This economic backdrop sets the stage for this study: the purpose of which is to describe how managerial talent is acquired by U.S. employers. This chapter begins with the background of the study followed by the problem statement, purpose, significance, research questions, conceptual framework, and study definitions.

### Background of the Study

Economic and market conditions make the acquisition, development, and retention of human capital an important source of competitive advantage for organizations in the 21st Century (Barney & Wright, 1998; Campbell, Coff, & Kryscynski, 2012; DeOrtentiis, Iddekinge, Ployhart, & Heetderks, 2018; Pfeffer, 1994, 1998; Silzer & Church, 2009; Wright, McMahan, & McWilliams, 1994). A large body of academic and practitioner research points to the importance of employees and the human

capital they possess in creating corporate value in the globally competitive marketplace (Bersin & Associates, 2011; DeOrtentiis et al., 2018; Huselid, 1995; Huselid & Becker, 1997; IBM, 2008; Lengnick-Hall, Lengnick-Hall, Andrade, & Drake, 2009; Ployhart, Nyberg, Reilly, & Maltarich 2014; Teng, 2007). In a 2006 article, Wooldridge suggested that intangible assets, such as a trained workforce and patents, account for over half of the market capitalization of public companies in the United States. A similar examination of S&P 500 companies by Accenture found that approximately 75% of their market value was attributable to intangibles and intellectual capital in 2002 compared with 20% in 1980 (Ballow, Burgman, Roos, & Molnar, 2004).<sup>1</sup>

In the early years of the 21st Century, the focus on strategically-aligned personnel selection, development, retention, and management processes led to the emergence of a new domain within the Human Resources (HR) field: talent management (Collings & Mellahi, 2009; Iles, Preece, & Chaui, 2010; Lewis & Heckman, 2006). Talent management is defined as “a holistic approach to optimizing human capital, which enables an organization to drive short-term and long-term results by building culture, engagement, capability, and capacity through integrated talent acquisition, development, and deployment processes that are aligned to business goals” (Paradise, 2009, p. 68). As this definition illustrates, talent acquisition (i.e., personnel selection) is a key component of talent management: a tenet that is agreed upon by a number of scholars and researchers in the HR field (Boudreau & Ramstad, 2007; Lawler, 2008; O’Leonard, 2009; Stahl et al., 2012; Wellins, Smith, & Erker, 2009).

---

<sup>1</sup> Traditionally, companies were valued based on accounting book values from assets such as buildings and equipment (Ballow et al., 2004)

Researchers have documented the importance of talent management on firm-level performance in several studies (IBM, 2008; O'Leonard, 2009; Teng, 2007). A study conducted by the Hackett Group found that companies that excel at managing talent generated earnings 15% greater than peers (no causal relationship was established; Teng, 2007). An IBM study found public companies more effective at talent management had higher percentages of financial outperformers than similar-sized companies with less effective talent management (IBM, 2008). Finally, a study conducted by Bersin & Associates documented a number of positive firm-level impacts among organizations with advanced talent management strategies when compared to organizations with no integrated talent management strategies (O'Leonard, 2009). These impacts include 40% lower turnover among high performers, 17% lower voluntary turnover, and 26% higher revenue per employee (O'Leonard, 2009). Cumulatively, these studies demonstrate that effective talent management results in the attainment of significant and positive financial and operational results within organizations.

While the importance of talent to organizational performance has been well-established, organizations often struggle to hire and retain the “right” talent. Several studies report disconcerting results based on examinations of the results of hiring<sup>2</sup>. In 2013, a survey of 2,494 hiring managers and HR professionals revealed that 66% of U.S. companies made bad hiring decisions (Careerbuilder, 2013). Based on a global survey of HR executives, the Corporate Executive Board (2012) reported that 20% of new hires are subsequently judged as *bad hires* or regretted decisions by employers. Gallup estimates

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<sup>2</sup> Hiring is the process and activities associated with the selection of new employees into an organization from external sources (Bidwell & Keller, 2014). For the purposes of this study, *hiring* is a distinct concept from the selection of internal employees for promotion or transfer.

companies systematically fail to hire the right manager 82% of the time (Beck & Harter, 2014).

Newly-hired employees also detect poor hiring decisions and subsequently make decisions to quit early in their employment (Caldwell & O'Reilly, 1990; Hom, Robertson, & Ellis, 2008). New employees demonstrate the highest rates of turnover during their first two years of employment, and voluntary and involuntary turnover rates are significantly higher than those associated with incumbent employees (Hom et al., 2008). Based on research of the turnover phenomenon, new employees have a higher probability of exiting the organization when they realize their fit with the job or organization is poor: an indicator of poor hiring effectiveness (Caldwell & O'Reilly, 1990; Schneider, 1987). In combination, these findings depict a situation in which hiring systems fail to produce consistently positive outcomes for employers.

Bad hires negatively impact the financial and operational results of employers (Careerbuilder, 2013). Whether due to voluntary or involuntary turnover, estimates of the cost of replacing an employee range from 16% to 213% of an employee's annual salary or wages (Boushey & Glynn, 2012). Other studies document broader impacts of poor hiring decisions including loss of revenue, damage to the organizational image, lowered organizational morale, customer dissatisfaction, severance and legal costs, and sunk costs associated with supervision and training (Abbassi & Hollman, 2000; Careerbuilder, 2013; Robert Half, 2013; Sutherland & Wocke, 2011).

Numerous researchers and practitioner sources note significant increases in worker mobility in the last two decades of the 20th Century and into the 21st Century (Bardwick, 2008; Bidwell & Briscoe, 2010; Farber, 2008). For example, the Bureau of

Labor Statistics (BLS) reports that the average person born in the latter years of the baby boomer held 11.3 jobs from the age of 18 to the age of 46. While many jobs are held for short durations early in ones working life, the report notes that 33% of jobs started by 40 to 46 year olds last less than one year and that 69% of them last less than five years (U.S. Bureau of Labor Statistics, 2013). The frequency of worker mobility increases the propensity for bad hires by employers due to the need to routinely fill vacancies (Beechler & Woodward, 2009).

Studies directly examining the causes of poor hiring decisions are scarce (Sutherland & Wocke, 2011). However, themes emerge when one reviews the general conclusions of personnel selection studies. Researchers reference the use of selection methods and criteria not validated by research as a source of selection errors (Anderson, 2005; Ericksen, 2012; Fernandez-Araoz, Groyberg, & Nohria, 2009; Highhouse, 2008; Le, Oh, Shaffer, & Schmidt, 2007; Rynes, Giluk, & Brown, 2007). In practitioner-oriented studies, a lack of talent intelligence is commonly identified as a root cause of poor hiring (Beechler & Woodward, 2009; Boatman & Erker, 2012; Careerbuilder, 2013; Fallow & Kantrowitz, 2011). Talent intelligence is defined as the collection and use of data to inform decision making to drive business success through the acquisition, development, and deployment of talent in the organization (Oracle, 2012; Paradise, 2009). When one integrates the findings of academic and practitioner studies, a lack of information on and use of spurious selection practices by employers appears as the source of many hiring errors.

The purpose of the personnel selection process is to select applicants who possess the knowledge, skills, and abilities to perform jobs in a superior manner (Gatewood,

Feild, & Barrick, 2008; Lawler, 2008; Viswesvaran & Ones, 2010). To fulfill this purpose, employers design selection systems that incorporate standards (i.e., selection criteria) and processes (i.e., selection methods) to evaluate applicants and ultimately inform selection decisions. According to personnel selection researchers, these systems should adopt criteria and methods that demonstrate high levels of reliability and validity in predicting job performance (Le et al., 2007; Viswesvaran & Ones, 2010) and are supported by meta-analytic research<sup>3</sup> results (Schmidt, 2006; Schmitt, Cortina, Ingerick, & Wiechmann, 2003; Viswesvaran & Ones, 2010). Systems of this type should result in the selection of new employees with a higher probability of success on the job (when compared to other applicants) due to the strong predictive nature of the selection criteria and methods incorporated into the system (Le et al., 2007; Viswesvaran & Ones, 2010).

General cognitive ability (GCA), personality, fit, experience, and education are the most widely-researched selection criteria within the industrial-organization (I/O) psychology field and the most frequently used in selection systems (Ng & Feldman, 2009; Rothstein & Goffin, 2006; Schmitt et al., 2003; Viswesvaran & Ones, 2010). A large body of empirical research examines the reliability and validity of these selection criteria as predictors of job performance and other outcomes. Within this body of research, GCA is the only criterion established as a robust predictor of job performance across all jobs and settings (Schmidt, 2002; Schmidt, Shaffer, & Oh, 2008). Other personnel selection criteria exhibit small correlations with job performance or cannot be generalized across jobs or situations (Schneider & Schmitt, 1992). However, other

---

<sup>3</sup> Meta-analytic research, or meta-analyses, are studies that analyze research results across many studies and develop findings that are generalizable across jobs, situations, and settings (Kuncel, Hezlett, & Ones, 2004). This research method was initially developed by Schmidt and Hunter (1977).

outcomes predicted by these selection criteria, such as job satisfaction, are often valued by employers or employees.

Employers use selection methods to collect applicant information that is used to assess an applicant's performance against selection criteria (Arthur & Villado, 2008; Gatewood et al. 2008). Studies have been conducted on assessment centers, situational judgment tests, interviews, application blanks, resume screening, and reference checking within the personnel selection research domain (Robertson & Smith, 2001; Schmitt et al. 2003; Viswesvaran & Ones, 2010). The selection methods an organization employs are based on a variety of factors including resource constraints, legal concerns, industry, perceived applicant reactions, existing diffusion of practices in the HR field, and the knowledge of HR professionals in organizations (Konig, Klehe, Berchtold, & Kleinmann, 2010; Rynes, 2012; Rynes, Colbert, & Brown, 2002; Rynes et al., 2007; Terpstra & Rozell, 1997). Further, employers utilize a greater number of personnel selection methods as the complexity of skills requirements, planned training, and pay for the position increase (Wilk & Cappelli, 2003).

Resume screening, interviews, and reference checking are the personnel selection methods used most frequently by employers during the hiring process (Behrenz, 2001; Bright & Hutton, 2000; Robertson & Smith, 2001; Wilk & Cappelli, 2003). These three methods tend to be utilized in a successive manner in which resume screening begins the applicant evaluation process, followed by interviews and reference checking (Robertson & Smith, 2001). Applicant testing of various types including personality, GCA, integrity, job-related knowledge, work samples, and physical ability tests may also be integrated

into selection systems, typically following the resume screening process (Quast, 2011; Society of Industrial and Organizational Psychology, n.d.).

While a large number of studies evaluate the reliability and validity of selection criteria, research focusing on selection methods is not as comprehensive (Russell, 2007; Viswesvaran & Ones, 2010). A considerable amount of research has been conducted on the structure, criteria utilized, and reliability and validity of applicant interviews. Interviews correlate with job performance with medium to large effect sizes in three meta-analyses (Conway, Jako, & Goodman, 1995; Huffcutt & Arthur, 1994; McDaniel, Whetzel, Schmidt, & Maurer, 1994). Finally, Hunter and Hunter (1984) report a small correlation between background checks and job performance. Schmidt and Hunter (1988) note this selection method adds incremental validity of 12% when used in combination with GCA measures. However, a need still exists to address the validity of resume screening as a predictor of job performance (Russell, 2007).

#### Statement of the Problem

Over 90% of hiring personnel in the United States utilize some form of resume screening process to eliminate *unqualified* candidates from the applicant pool (Boatman & Erker, 2012). The use of resume screening is widespread due to its simplicity, efficiency, and low cost (Cable & Gilovich, 1998; Cole, Feild, & Giles, 2003a). However, personnel selection researchers note that resume screening is a likely source of hiring mistakes (Robertson & Smith, 2001; Russell, 2007). Resume screening practices may also lead to adverse impacts for applicant classes protected under the U.S. Equal Employment Opportunity Commission's *Uniform Guidelines on Employment Selection Procedures* (Anderson, 2005; Derous, Nguyen, & Ryan, 2009; Mohamed, Orife, &



Wibowo, 2002; Russell, 2007). Both of these risks have a propensity to result in negative outcomes for employers including costs associated with poor performance, turnover, legal defense, and settlements (Abbassi & Hollman, 2000; Careerbuilder, 2013; Robert Half, 2013; Sutherland & Wocke, 2011; Williams, Schaffer, & Ellis, 2013).

Personnel selection researchers observe that hiring personnel have difficulty in assessing the resumes of applicants who possess significant levels of previous work experience (Cole, Feild, & Giles, 2003b; Rynes, Orlitzsky, & Bretz, 1997). Research suggests that the processes and criteria used to screen resumes of experienced applicants differ from those used in college-based hiring (Breugh, 2009; Brown & Campion, 1994; Rynes et al., 1997). For example, an applicant's grade point average (GPA) is a common biographical data (biodata<sup>4</sup>) element that is used in screening the resumes of impending college graduates (Brown & Campion, 1994; Burns, Christiansen, Morris, Periard, & Coaster, 2014; Cole, Rubin, Feild, & Giles, 2007; Tsai, Chi, Huang, & Hsu, 2011), but this biodata element is rarely included or considered relevant on the resumes of experienced applicants (Thoms, McMasters, Roberts, & Dombkowski, 1999). Although differences exist in the resume screening processes and criteria utilized for different groups of applicants, the majority of the extant research on resume screening processes has been conducted in college settings utilizing the resumes of graduating students (Breugh, 2013; Rynes & Cable, 2003; Tsai et al., 2011). Given the limited generalizability of this research, little is known about the processes or criteria utilized by

---

<sup>4</sup> Biodata is defined as "historical and verifiable pieces of information about an individual" (Asher, 1972, p. 266).

hiring personnel when screening the resumes of experienced applicants (Cole, Feild, Giles, & Harris, 2004; Rynes et al., 1997; Tsai et al., 2011).

The majority of the research on resume screening also predates the widespread use of applicant tracking systems (ATS) to support hiring processes. ATS are used by employers to organize, filter, and evaluate applicant resumes electronically (Shields, 2018). Bradford (2012) reports that 90% of large businesses in the United States are utilizing some form of applicant screening software in their hiring processes. Weber (2012) finds that applicant tracking systems are used extensively among large and mid-sized companies in the United States. Further, she reports that approximately half of the applicants for jobs in large companies are eliminated from the applicant pool through the use of ATS resume screening programs. The recent surge in the use of ATS for applicant processing and evaluation increases the need for research on the resume screening processes used by employers including both human and technology-enabled components.

Several researchers recommend that process-rich studies *outside the college placement office* are needed to understand the methods and criteria utilized by employers when hiring experienced applicants (Rynes et al., 1997; Thoms et al., 1999; Tsai et al., 2011; Wilk & Cappelli, 2003). Understanding the current selection methods and criteria utilized by employers is fundamental to producing relevant research results for practitioners (Cooper & Locke, 2000; Rynes & Cable, 2003). Given the importance of personnel selection results on organizational outcomes, descriptive research on the resume screening process for experienced applicants is warranted. The current study seeks to address this gap in the resume screening research and specifically focuses on

managerial positions: a job family for which selection systems appear to fail to select the best candidate over 80% of the time (Beck & Harter, 2014).

### Purpose of the Study

The purpose of this study was to describe the resume screening process utilized by employers when hiring managerial employees<sup>5</sup>. Describing this process involved gathering information on the way in which resume screening fits within the overall hiring process and determining its relationships with other selection methods. In addition, the study ascertained the resume screening criteria utilized by hiring personnel when selecting managers for their organizations. Although knowledge of these screening criteria provides value in the personnel selection domain (Thoms et al. 1999; Tsai et al., 2011; Wilk & Cappelli, 2003), describing the sources and the relative importances of these criteria affords greater insight into personnel selection system designs and related decision-making processes (Rynes et al., 1997). This information is essential to developing potential enhancement tactics to improve the validity of the resume screening process (Russell, 2007).

The study sought to describe the resume screening phenomenon for managerial hiring in the *contemporary* context of personnel selection systems in organizations. Developments in the global economy such as continued automation, outsourcing, and the access and use of information technology influence and alter the context and demands on hiring systems (Florida, 2004; Lawler, 2008; Moretti, 2012; Pink, 2005; Trilling & Fadel, 2009). For example, 90% of large businesses in the United States utilize some form of

---

<sup>5</sup> Managerial employees include first level, middle level, and top level managers (Shenhar, 1990). In this study, the focus was on first and middle level managers since hiring processes for top level managers may be distinct from the processes associated with lower level personnel (Hollenbeck, 2009).

applicant screening software during the hiring process (Bradford, 2012). These developments have altered the manner in which applicant resumes are screened (Russell, 2007; Thoms et al., 1999). Since Brown and Campion's (1994) study, however, researchers have not focused on how resume screening is actually performed by hiring personnel in organizational settings. As a result, the research on resume screening over the past 20 years follows a loosely-articulated model that has not been reassessed in light of the widespread use of technology in hiring processes.

Hiring high-performing managers is difficult for many organizations regardless of their sizes, locations, or industries (Beck & Harter, 2014). Hiring high-performing managers is a significant challenge in the banking and financial services industry<sup>6</sup> (Hyde & McMahon, 2007). Massive structural changes and scandals have impacted the operating environment and performance expectations for managers within the industry over the past 20 years (Bartel, 2004; Cohn, Fehr, & Marechal, 2014; Ernst & Young, 2018). The industry continues to be challenged by a number of issues that are within the purview of managerial and executive personnel including: (a) new-hire turnover of 14% (Krider, O'Leonard, & Erickson, 2015), (b) a culture of *dishonesty* that erodes the industry's reputation (Cohn et al., 2014), and (c) material marketplace changes resulting in branch closures and consolidations (Ernst & Young, 2018).

While the managerial challenges in the banking and financial services industry are formidable, research shows that high-performing managers have a significant and positive impact on branch performance (Bartel, 2004) including the contribution of three

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<sup>6</sup> The banking and financial services industry or sector includes four subsectors: (a) banking, (b) asset management, (c) insurance, (d) venture capital, and (e) private equity (SelectUSA, n/d).

times the growth of their local competitors: incremental revenue with a value of \$500,000 to \$1 million (Hyde & McMahon, 2007). Based on the importance of managerial performance to organizational success in this sector, this study focused on the resume screening process for managerial applicants in the banking and financial service sector. Not only is managerial talent considered pivotal in the industry, but the industry is a core pillar of the U.S. economy and a requirement for economic development (Cohn et al., 2014).

This study addressed a notable gap in the personnel selection literature: understanding the processes and criteria used by employers when hiring managers (Rynes et al., 1997; Thoms et al., 1999; Tsai et al., 2011; Wilk & Cappelli, 2003). Managerial performance is a significant driver of organizational performance (Beck & Harter, 2014); however, little research has been focused on the methods or criteria used by employers to hire managers (Rynes et al., 1997; Thoms et al., 1999; Tsai et al., 2011; Wilk & Cappelli, 2003). This study was intended to produce insight into the resume screening process for managerial applicants that may be used as a basis for the improvement of hiring processes and future research. A qualitative approach was used to conduct the study since no research-based model exists to explain the managerial hiring process or the use of resume screening for this applicant population (Creswell, 2013).

### Research Questions

Consistent with the purpose of this study, the main research question was: What process is used by Human Resources personnel in screening the resumes of applicants for managerial positions? This central question informed five secondary research questions:

1. How does resume screening fit within the overall hiring process for managerial applicants?
2. How are applicant tracking or e-recruiting systems utilized during the resume screening process for applicants of managerial jobs?
3. What are the criteria used by Human Resources personnel when screening the resumes of managerial applicants?
4. Which criteria are most important to Human Resources personnel in screening the resumes of managerial applicants?
5. What are the sources of the criteria utilized by Human Resources personnel in screening the resumes of managerial applicants?

#### Significance of the Study

The linkage between the quality of hiring and organizational outcomes is well-established (Boudreau & Ramstad, 1996; Erickson, Lamoureux, & Moulton, 2014, Lawler, 2008). Organizations can reasonably expect that greater levels of hiring success will contribute to improved organization-level outcomes such as profitability (Erickson et al., 2014). A variety of approaches may be taken by employers in order to improve their hiring success including improvements in applicant sources, recruiting practices, selection methods, selection criteria, and onboarding (Adkins, 1995; Carr, Pearson, Vest, & Boyar, 2006; Rynes & Cable, 2003; Russell, 2007). Sackett and Lievens (2008) identified five strategies that may be utilized by organizations to improve hiring success through selection system enhancements (i.e., enhancements of criteria and methods): (a) measure the same construct (e.g., personality) with another selection method, (b) improve construct measurement, (c) improve contextualization of measurement (e.g., ensure that

scales are work-specific), (d) reduce response distortion when using self-report instruments, and (e) impose a greater level of structure in the use of existing selection methods. This study provides an initial examination of resume screening processes and criteria for managerial applicants that could be used to implement the strategies outlined by Sackett & Lievens (2008).

Since the foundational research on the resume screening process was performed by Brown and Campion (1994), over 20 studies have been conducted on the phenomenon. Most of these studies examine the resume screening process in college-based hiring through quantitative research methods (Rynes & Cable, 2003). Due to perceived differences in applicant attributes and screening criteria, results from these studies are not generalizable to other applicant types including applicants for managerial positions (Rynes et al., 1997; Thoms et al., 1999; Tsai et al., 2011; Wilk & Cappelli, 2003). In fact, 93% of job applicants are not college seniors seeking employment (Rynes, Reeves, & Darnold, 2013). Consequently, theoretical or empirical models associated with the resume screening process used when hiring experienced applicants, including managers, are virtually non-existent in the published research. As Cooper and Locke (2000) observe, “You cannot build a sensible theory without facts. Theory building should be an inductive process. You should start by gathering facts pertinent to the issue you want to study from observations of reality” (p. 340). This study provides a formative analysis of the resume screening process used by employers when hiring managerial applicants through the use of the descriptive phenomenological research method.

Examining the practices associated with managerial hiring is also warranted given the impact that managerial performance has on organizational results. Approximately 17.8 million workers in the United States, 11.6% of the workforce, were classified as managers in 2017 (U.S. Bureau of Labor Statistics, 2017). While managers account for a small percentage of the workforce, managerial performance has a large and significant impact on organizational performance outcomes including employee engagement levels, individual and workgroup motivation and performance, and financial performance (Amabile & Kramer, 2011; Beck & Harter, 2014; Buckingham & Coffman, 1999). For example, Gallup estimates that high-performing managers contribute 48% higher profits to their organizations than their average-performing colleagues (Beck & Harter, 2014). Consequently, improving the quality of hires in managerial positions is likely to have a positive and significant impact on organizational outcomes at all levels of the organization.

Managerial talent is pivotal to the success of organizations in the banking and financial services industry (Bartel, 2004; Hyde & McMahon, 2007). This industry, composed of approximately six million employees (U.S. Bureau of Labor Statistics, 2015), is a prominent contributor to the overall health and economic development of the U.S. economy (Cohn et al., 2014). Further, the industry continues to be plagued by high turnover rates (Krider et al., 2015), scandals (Cohn et al., 2014), and talent scarcity (Parsons, 2014). Crowe Horwath (2013) reported that the most significant HR concern among financial institutions was identifying and hiring the right employees. As such, research on the managerial hiring practices within the banking and financial services



sector is likely to provide a basis for improving the quality of managers: an attribute that is linked to organizational financial performance.

In-depth, process-rich examination of the resume screening phenomenon for experienced job applicants, such as managers, is needed to provide meaningful guidance to employers and to proceed with further research in this area (Russell, 2007; Rynes & Cable, 2003; Rynes et al., 1997; Thoms et al., 1999). Researchers in both the organizational development (OD) and HR domains note the limitations of positivist research (i.e., logical-empirical) studies in revealing the complexity of work experiences and bridging the gap between management theory and practice (Anosike, Ehrich, & Ahmed, 2012; Ehrich, 2005; Gibson & Hanes, 2003). However, Gibson and Hanes (2003) report only four research articles and nine conference papers using phenomenological research methods published between 1998 and 2002 in HR, OD, and career development publications. Anosike et al. (2012) found similar results in their review of phenomenological research method usage in management and marketing journal articles. Anosike et al. (2012) and Gibson and Hanes (2003) encourage researchers to use phenomenological research methods for theory building, theory explication and empirical research in the HR and OD domains.

### Conceptual Framework

The conceptual framework of this study relied on four foundational theories from economics and I/O psychology: (a) human capital theory, (b) utility analysis, (c) attribution theory, and (d) cognitive schemas. In addition, the framework is informed by empirical research that identifies several additional factors (e.g., environmental factors and the use of technology) that influence the design of hiring processes and criteria and

their use by organizations. The theories and empirical findings provided a foundation for the constructs examined in this study including: (a) the assumptions associated with the portability of knowledge and skills across organizational boundaries, (b) the establishment of hiring processes and applicant assessment criteria by employers, (c) the use of resume screening processes and related criteria, (d) the relative importance of the resume screening assessment criteria used by hiring personnel, and (e) the influencers on the processes and criteria used in resume screening.

Given that resume screening is a sub-process or component of the overall hiring process, several factors may have both a direct and indirect effect on the resume screening process and criteria. For example, human capital theory influences both the overall hiring process (indirect effect on resume screening) and the resume screening process (direct effect). As Figure 1 depicts, four groups of theories and factors influence the resume screening process and criteria. The influencers include two theories: human capital theory and utility theory. These theories have an impact on the overall hiring process and criteria as well as the resume screening process and criteria. Environmental factors and the use of technology (e.g., applicant tracking systems) similarly influence the resume screening process and criteria. Finally, attribution theory and cognitive and role schemas influence how individuals actually perform resume screening.

### *Human Capital Theory*

Human capital theory provides a basis for the establishment of hiring systems and other HR processes (Acemoglu & Pischke, 1998; Becker, 1962; Gathmann & Schonberg, 2010). The theory posits that two types of human capital exist within individuals: general human capital and specific human capital (Becker, 1993). According to Becker (1993),

general human capital is defined as the knowledge, skills, and values of individuals that have worth in many organizations. In contrast, specific human capital is defined as knowledge and skills of individuals that would be of no use in other organizations. The base-level concept of general human capital includes the principle that general human capital is transferrable or portable from one organization to another one (Becker, 1993).

Studies have confirmed the portability of knowledge and skills and their successful application in new organizations: the essential premise of the portability of general human capital (Almeida & Kogut, 1999; Dokko, Wilk, & Rothbard, 2009; Mahony, Limchak, & Morrell, 2012; Rao & Drazin, 2002; Simon & Uscinski, 2012; Uppal, Mishra, & Vohra, 2014). These studies were conducted using multiple job types (e.g., semi-skilled, professional) in several industries including insurance, financial services, telecommunications, semiconductors, and food service. The results of the studies lend support for the use of previous work experience and education as personnel selection criteria (Dokko et al., 2009; Ng & Feldman, 2009).

Studies have also confirmed the presence of specific human capital and its *lack of portability* between organizations in a number of occupations including professional baseball players, cardiac surgeons, executives, security analysts, technology entrepreneurs, biochemists, and professional football players (Glenn, McGarity, & Weller, 2001; Groysberg, Lee, & Nanda, 2008; Groysberg, McLean, & Nohria, 2006; Groysberg, Sant, & Abrahams, 2008; Huckman & Pisano, 2006; Long & McGinnis, 1981; Marvel & Lumpkin, 2007). For example, in a study of high-performing security analysts, Groysberg, Lee, and Nanda (2008) found that an analyst who moved to a new firm experienced a drop in performance that lasted for at least two years and decreased

the value of the acquiring firm by approximately \$24 million. The authors attribute negative effects to the loss of human capital when an analyst changed jobs.

The premise of human capital portability is an important determinant of hiring processes and related criteria (Acemoglu & Pischke, 1998; Becker, 1962; Gathmann & Schonberg, 2010). For example, the portability premise informs the use of previous work experience and education as hiring criteria by employers (Groot & van den Brink, 2000). Based on the theory and related empirical results, the knowledge, skills, abilities, and other characteristics (KSAOs) gained by the individual from education and work experience are transferrable to a new organization in varying degrees. Thus, this theory influences both the overall hiring and resume screening process and criteria.

#### *Utility Analysis*

Utility analysis informs the rationale utilized by employers when establishing hiring processes and related criteria (Wilk & Cappelli, 2003). Utility analysis is defined as “the process that describes, predicts and/or explains what determines the usefulness or desirability of decision options, and examines how that information affects decisions” (Boudreau, 1991, p. 622). Researchers suggest job content and complexity is used by employers to define the required KSAOs needed by job applicants ((Wilk & Cappelli, 2003). This analysis subsequently influences the level of demand for hiring processes utilized to gather applicant information. From a utility perspective, jobs with greater levels of complexity (e.g., managerial jobs) will influence employers to adopt a greater number of selection methods and more complex criteria in order to minimize hiring risks (Wilk & Cappelli, 2003). In a confirmatory analysis, Wilk and Cappelli (2003) found that job complexity was predictive of the number of hiring methods used by employers.

In the context of this study, utility analysis influences both the overall hiring and the resume screening processes and criteria. Based on this theory, a greater number of methods would be utilized in the managerial hiring process when compared to those used for entry-level positions (e.g., tellers). As such, the theory explains why resume screening is a common hiring method used by employers when selecting managerial applicants.

### *Environmental Factors*

A number of environmental factors influence the development of hiring processes and criteria and their use within organizations. In a study of staffing practices, Terpstra and Rozell (1997) found that use of hiring practices were significantly impacted by the knowledge of HR practitioners, legal concerns, and resource constraints within the organization. In a subsequent study of the knowledge and beliefs of HR professionals, Rynes et al. (2002) found that the knowledge and acceptance of HR research by practitioners were important determinants of HR practices in selection and other HR operations. A study of Swiss HR practitioners identified two additional factors that influence the development of hiring processes and systems: (a) perceived applicant reactions to a selection procedure and (b) the level of diffusion of the HR practice in the field (Konig et al., 2010). All of these factors establish the core context of the design and execution of the hiring process and the resume screening process, a component of the overall hiring process.

### *Use of Technology*

The use of information technology systems in HR operations has also been identified as an influencer or driver of both hiring systems and decisions. Based on a

survey of HR managers, Chapman and Webster (2003) reported modest levels of technology use by employers for application and resume receipt, applicant screening, and related decision-making; however, they noted such use of technology was likely to increase significantly in the future. In 2012, Bradford reported that 90% of large businesses in the United States were utilizing some form of applicant screening software (i.e., ATS) in their hiring processes. Weber (2012) found that ATS were used extensively among large and mid-sized companies in the United States. She also reports that approximately half of the applicants for jobs in large companies were eliminated from the applicant pool through the use of ATS resume screening programs. Given the widespread use of technology to support the hiring process, this factor influences both the design of the overall hiring and resume screening processes as well as their execution.

#### *Attribution Theory*

Similar to the manner in which utility analysis explains how organizations choose selection methods and criteria, attribution theory explains how resume screeners utilize biodata on applicant resumes (Cole et al., 2007). Attribution theory suggests that individuals use informational cues to determine whether the cause of behavior is due to dispositional (i.e., attributed to the individual) or situational (i.e., attributed to the situation) factors (Fiske & Taylor, 1991). In the context of resume screening, hiring personnel use biodata on the resume to form causal judgments as to whether applicants possess the KSAOs to perform a job or not (Cole et al., 2007). Given the difficulty in judging and determining the cause of behavior, hiring personnel are likely to make attribution errors (Knouse, 1989; Ross, 1977). In this case, hiring personnel may assess

applicants inaccurately based on the attributions they make from biodata contained on resumes (Russell, 2007).

### *Cognitive and Role Schemas*

Cognitive and role schemas influence the review and decision-making processes that are undertaken by hiring personnel (Cole et al., 2007). Cognitive schemas aid individuals in understanding their environment through the organization of knowledge from previous experience (Hodgkinson, 2003). Role schemas are expectations of behavior for individuals in specific roles (Hodgkinson, 2003). For example, an individual may develop a role schema for the behaviors expected of a Chief Executive Officer based upon their interaction with CEOs in previous employment situations. When hiring personnel are determining an applicant's level of fit or match with a job, they employ both cognitive and role schemas (Dokko et al., 2009). In this process, hiring personnel process applicant biodata to make causal judgments about applicants and their suitability for a specific job (Cole et al., 2007).

As shown in Figure 1, human capital theory, utility theory, environmental factors, and the use of technology (e.g., ATS) influence the overall hiring processes and criteria used by employers. Given that the resume screening process is a sub-process of the overall hiring process, it is similarly influenced by these theories and factors. In addition, attribution theory and cognitive and role schemas provide insight into how resume screening is actually conducted during the hiring process. The manner in which these factors influence resume screening practices is based on whether it is conducted by individuals or through technology applications (e.g., ATS). Whereas attribution theory and cognitive and role schemas influence the resume screening process when it is

conducted by individuals, these factors have not been identified as influencers on technology-based resume screening.

Figure 1 depicts the relationships between the theories and empirical findings related to resume screening and how these factors influence the design of overall hiring process and criteria and the resume screening process and criteria

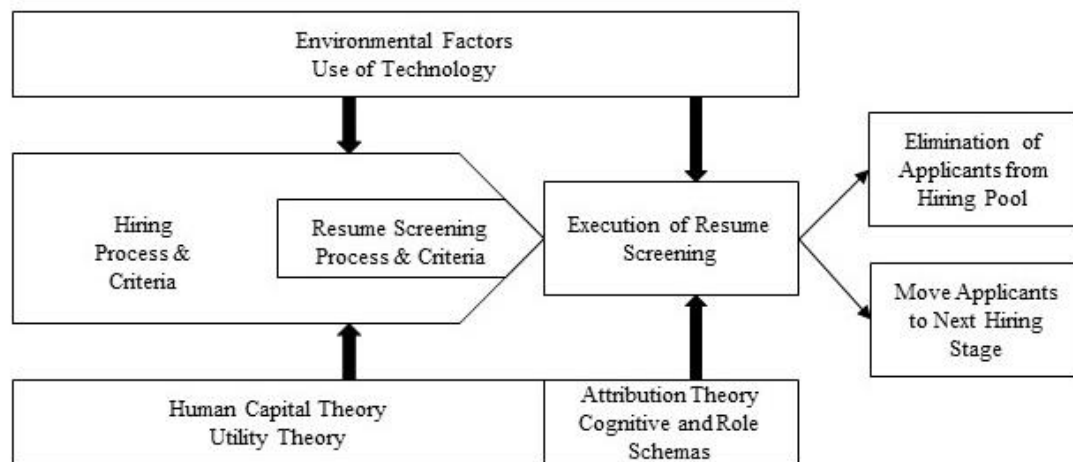


Figure 1. Conceptual Framework

#### Definition of Terms

The following terms are utilized in the study.

1. *Applicant tracking systems (or eRecruitment systems)* are computerized systems that track job applicants during the hiring process. These systems are sometimes utilized to screen applicants based on resumes or other content (e.g., applicant responses to screening questions) in an automated fashion (Chauhan, Sharma, & Tyagi, 2011).
2. *Education level* is the academic credentials or degrees that an individual has obtained (Ng & Feldman, 2009).



3. *Fit* is the level of match or congruence between a job applicant's knowledge, skills, abilities, personality, and values and the demands of the job (person-job fit), the values or personality of the supervisor (person-supervisor fit), the goals and values of the work group (person-group fit), and/or the values of the organization (person-organization fit; Kristof-Brown, 2000; Kristof-Brown, Zimmerman, & Johnson, 2005).
4. *General cognitive ability* is the ability of an individual to learn (Schmidt, 2002).
5. *Hiring* is the process associated with the selection of new employees into an organization from external sources (Bidwell & Keller, 2014).
6. *Job performance* is an individual's performance in a given job including core task performance, organizational citizenship behaviors, and counterproductive work behaviors (Ng & Feldman, 2009; Rotundo & Sackett, 2002).
7. *Managerial employees* include both first level and middle level managers. These employees are responsible for the direct production of goods and services (first level) or administration (middle level). Both of these types of managers have significant responsibilities for supervising or managing other employees (Shenhar, 1990).
8. *Personality factors* are the five commonly-accepted dimensions of personality including: (a) extraversion, (b) emotional stability, (c) agreeableness, (d) conscientiousness, and (e) openness to experience (Barrick & Mount, 1991; Tett, Jackson, & Rothstein, 1991).

9. *Previous work experience* is the employment-related experience accumulated by job applicants from their work in other organizations ((McDaniel, Schmidt, & Hunter, 1988). This experience may be directly related (e.g., occupational) or unrelated to the prospective job for which the applicant has applied (Groysberg et al., 2006). Within previous work experience, five subcategories exist.
- a. *General management experience* is “the skills to gather, cultivate, and deploy financial, technical, and human resources” (Groysberg et al., 2006, p. 3) that includes functional expertise and leadership and decision-making capabilities.
  - b. *Strategic experience* is the skills gained from experience in situations that require specific skills such as cutting costs, driving growth, or managing in cyclical markets (Groysberg et al., 2006).
  - c. *Industry experience* is the technical, regulatory, customer, or supplier knowledge that is unique to an industry (Groysberg et al., 2006).
  - d. *Relational experience* is the effectiveness gained by a manager from established relationships with colleagues and other team members (Groysberg et al., 2006).
  - e. *Company-specific experience* is the knowledge of processes, procedures, culture, and structures that are unique to an organization (Groysberg et al., 2006).
10. *Resume screening* is the process of examining the level of fit or match between job-related attributes (e.g., required knowledge, skills, and

educational expectations) and the applicant's biodata contained on his/her resume (Cole et al., 2003a). The outcome of this process is the elimination of *unqualified* applicants from the applicant pool (Cole et al., 2003a; Robertson & Smith, 2001; Russell, 2007).

### Summary

The acquisition of managerial talent is a challenge for many organizations and industries (Beck & Harter, 2014). When managerial talent is pivotal to organizational success, as in the banking and financial services industry (Hyde & McMahon, 2007), overcoming this challenge enables higher levels of organizational performance (Amabile & Kramer, 2011; Beck & Harter, 2014; Buckingham & Coffman, 1999). However, little is known about the hiring processes used by employers for managerial applicants (Cole et al., 2004; Rynes et al., 1997; Tsai et al., 2011). The present study sought to address this gap through the development of inductive descriptions of the processes, criteria, sources of criteria, and importances of criteria used by employers when screening the resumes of applicants from external sources for managerial positions. Increased knowledge of this selection method may provide results that could be utilized to improve the use of resume screening and the overall validity of selection systems.

## CHAPTER II - REVIEW OF THE LITERATURE

The criteria and methods used to hire employees have been major focuses of practitioners and academics in the HR and I/O psychology domains for the past 100 years (Vichur & Bryan, 2012). A large body of literature has been produced by researchers on the assessment of applicant potential to perform on the job and the development of systems for assessing potential during the hiring process (Schmitt, 2012). This chapter reviews the relevant theoretical and empirical literature related to the use of resume screening, a common selection method used by employers during the hiring process (Brown & Campion, 1994; Cole et al., 2003a; Russell, 2007). The review of literature is divided into five sections. Section 1 presents a historical view of the theory of human capital accumulation and its impacts. Section 2 reviews the principles of design and use of personnel selection systems. Section 3 reviews the criteria that are commonly utilized by employers in making hiring decisions. Section 4 reviews the methods that are commonly used during hiring process, including resume screening. Finally, section 5 examines the issues related to the portability of human capital across organizational boundaries.

### Impacts of Human Capital

There is a long history of economists who have considered human beings or their skills as a form of capital including Petty, Smith, Say, Senior, List, von Thunen, Roscher, Bagehot, Ernst Engel, Sidgwick, Walras, and Fisher (Kiker, 1966). During the latter half of the 20th Century, a group of economists, principally from the University of Chicago, developed the foundations of human capital theory including explanations of how it is acquired and its impacts on individuals, groups, organizations, and society in general

(Zula & Chermack, 2007). As with many multi-dimensional theories, the development of human capital theory was an iterative process in which a number of economists contributed incremental theory and empirical research to develop the core principles of the human capital construct. Foundationally, Mincer (1958) theorized that experience on the job led to skill development and contributed to a rise in earnings. Subsequently, Schultz (1961) demonstrated that human capital had grown at a faster rate than non-human capital in Western economies in the 20<sup>th</sup> Century. He further established key examples of human capital accumulation including direct expenditures in education, health, and migration for employment. Finally, Schultz noted that human capital deteriorates when it is idle from conditions such as unemployment (Schultz, 1961).

The work of Mincer and Schultz provided a basis for the seminal work of Gary Becker, *Human Capital*, which established or elaborated on many of the key components, accumulation methods, and implications of human capital (Becker, 1993). Becker defined human capital accumulation as investments in education, training, and health. He identified three types of training or knowledge that were related to returns on human capital: (a) on-the-job training (OJT), (b) schooling, and (c) other knowledge acquired that increases one's command of economic situations (Becker, 1993). Becker also defined two types of OJT that have become the basis of subsequent research in the human capital domain: general training and specific training. General training was defined as training that increases the marginal product of the employee in many other organizations (e.g., skills training that is portable from one organization to another). Specific training was defined as "training that has no effect on the productivity of trainees that would be useful in other firms" (Becker, 1993, p. 17). The general/specific human capital construct was

subsequently utilized as a foundational theory in research studies on competitive advantage (Campbell et al., 2012), portability of human capital between organizations and occupations (Gathmann & Schonberg, 2010; Groysberg et al., 2006), and career success (Ng, Eby, Sorenson, & Feldman, 2005).

Researchers have elaborated on Becker's original theories of human capital and its impacts. Blundell, Dearden, Meghir, and Sianesi (1999) noted that strong evidence exists that human capital depreciates over time. From the extant research, there appear to be two drivers of human capital depreciation. First, unemployment, a state in which skills are idle, causes human capital to deteriorate (Schultz, 1961). Secondly, human capital depreciates due to technological developments (De Grip & van Loo, 2002). In this scenario, the demand for a particular occupation may decline as exemplified by the demand for workers in occupations such as blacksmithing, saddlery, and carriage drivers upon the introduction of the automobile. Organizational renewals that occur due to technological developments may also change the levels and types of skills demanded in an occupation or job (De Grip & van Loo, 2002). For example, as the information technology marketplace moved away from mainframe systems, the programming skills demanded in information technology occupations shifted from COBOL to C++, SQL, and Java. These tangible examples of human capital depreciation support the concept that human capital is dynamic and can be improved (e.g., through additional learning) or diminished. The dynamic nature of human capital is explored further in the Portability of Human Capital section of this chapter.

Ng and his colleagues documented a number of important outcomes related to human capital accumulation by individuals (Ng et al., 2005; Ng & Feldman, 2010). A

meta-analysis conducted by Ng et al. (2005) found that human capital variables showed moderate to weak effects on salary, a measure often used in career success research. Educational attainment, total years in the workforce, hours worked per week, organizational tenure, and social capital were the human capital variables that demonstrated the most significant influences on salary. In a subsequent article, Ng and Feldman (2010) noted that human capital has been shown to be robustly and consistently related to salary level, number of promotions, number of job offers, and number of development opportunities. The authors explained that high levels of human capital accumulation send signals to potential employers that applicants possess both job-relevant knowledge and valued personal attributes such as intelligence, diligence, and self-motivation (Ng & Feldman, 2010).

Human capital has been demonstrated to have important impacts on organization-level results. The theoretical underpinnings of these impacts were established by Jay Barney's (1991) work on competitive advantage and the resource-based view (RBV) of the firm (Lengnick-Hall, et al., 2009). RBV theory posits that sustainable competitive advantage is achieved through organizational resources that are valuable, rare, imperfectly imitable, and without strategically equivalent substitutes (Barney, 1991). Building on Barney's theory, Wright et al. (1994) demonstrated that sustainable competitive advantage could be achieved through human capital when these four resource conditions were achieved by an organization. The authors essentially established the linkage between human capital and organizational performance as follows:

It is through the human resource capital pool and employee behavior that human resources can constitute a sustained competitive advantage. Thus, it is possible that a human resource capital pool may exist within the firm and be discovered and exploited by managers. However, this human capital pool can also be developed and behavior brought in line with firm goals through human resource practices which are under the control of managers. This is, in essence, the focus of strategic human resource management (Wright, et al., 1994, p. 23).

Finally, Barney and Wright (1998) contended that the HR function and the organizational resources it manages (e.g., human capital skills, employee commitment, culture, teamwork, etc.) would most likely be the sources of sustained competitive advantage in the 21st Century. The RBV theory and its extension into the human capital domain has led researchers to study the ways in which human capital impacts organizational performance.

The formative analysis of the impact of human capital and its deployment in the organization was conducted by Huselid (1995). Huselid found that organizations that adopted high performance work practices<sup>7</sup> in HR outperformed their peers significantly in areas such as lower turnover, increased productivity, and improved financial performance (Huselid, 1995). Subsequent analyses conducted by Huselid and Becker (1997) demonstrated that the adoption of high performance work practices in HR also had a significant and positive impact on shareholder wealth.

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<sup>7</sup> High performance work practices were defined as an organization's adoption and use of practices such as pre-employment testing, job analysis, formal information sharing, performance appraisals, and incentive compensation (Huselid, 1995).



Ployhart and his colleagues have engaged in both theory building and empirical analyses that redefine human capital constructs, describe the causal relationships between human capital resources and organizational performance, and extend and clarify the RBV model (Ployhart, 2004; Ployhart, 2006; Ployhart, Iddekinge, & MacKenzie, 2011; Ployhart et al., 2014). Collectively, Ployhart and his colleagues have provided new theory on human capital constructs and definitions. First, they have developed insights between traditional individual-based definitions of human capital (based on Becker and Schultz) and human capital resources<sup>8</sup> that contribute to unit and firm level performance (Ployhart et al., 2014). Second, this group of researchers has demonstrated that the relationship between human capital resources (unit-level) and performance is indirect: a variety of variables (e.g., unit-level behaviors, job attitudes) may intervene between human capital resources and performance (Ployhart et al., 2011). Consequently, these researchers have extended and clarified the RBV model by demonstrating that the presence of human capital with an organization *alone* does not lead to sustainable competitive advantage. Rather, the researchers conclude:

Leveraging human capital as a mean of competitive advantage requires more than simply adopting a “bundle” of HR practices, but rather relies on recognizing that the practices in the bundle will influence the stocks and flows of different types of human capital. Understanding how different forms of human capital are related allows managers to create synergistic effects on unit performance, which in turn

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<sup>8</sup> Human capital resources are defined as “individual or unit-level capacities based on KSAOs that are accessible for unit-relevant purposes” (Ployhart et al., 2014, p.376).

make it more difficult for competitors to copy their resources (Ployhart et al., 2011, p. 365).

In summary, these researchers have collectively identified and started to address several shortcomings in human capital theory and research including: (a) a lack of clarity or terms and related boundary conditions for them, (b) a lack of research on the relationship between human capital resources and unit and firm level outcomes, and (c) a recognition that the combination of human capital resources at the unit-level of an organization is likely the locus of performance and sustainable competitive advantage (Ployhart et al., 2014).

In their article tracing the history of strategic human resource management, Lengnick-Hall et al. (2009) describe the evolution of HR from a field that focused on ensuring that employees had the skills and motivation to meet organizational goals to one that focuses on human capital contributions, strategic capabilities, and the competitive performance of the organization. The authors note that the shift toward a strategic focus in the field has resulted in a number of studies that examine the linkage between HR practices and systems and organizational performance. These studies include those conducted by Huselid and his colleagues (1995, 1997), as well as more recent studies that demonstrate the positive impact of talent management practices on organizational results (IBM, 2008; O'Leonard, 2009; Teng, 2007). A meta-analysis conducted by Crook, Todd, Combs, Woehr, and Ketchen (2011) of 66 individual studies found significant relationships between human capital and both operational and organizational performance. This study provides conclusive evidence of the importance of human capital to positive organizational outcomes. Noting the significance of the study results,

Crook et al. (2011) conclude that “our results leave little doubt that to achieve high performance, firms need to acquire and nurture the best and brightest human capital available and keep these investments in the firm” (p. 453).

### Personnel Selection Systems

Personnel selection is a strategic domain of HR management and a key component of talent management (Boudreau & Ramstad, 2007; Lawler, 2008; Lievens & Chapman, 2009; O’Leonard, 2009; Stahl et al., 2012; Wellins et al., 2009). Viswesvaran and Ones (2010) define personnel selection as “the decision of which individuals among a pool of applicants possess the needed knowledge, skills, abilities, and other characteristics to successfully perform a job and then accordingly select them” (p. 171). The selection process necessitates systems within organizations. Roe (2005) describes a personnel selection system as “a configuration of instruments, procedures, and people created with the purpose of selecting candidates for certain positions, in such a way that they can be expected to optimally fulfill pre-defined expectations” (p. 74). By design, personnel selection systems are *selective* and focus on evaluating the differences among applicants based on the criteria established for decision-making (Viswesvaran & Ones, 2010).

Prior to 1977, applied psychologists and employers presumed that the abilities needed for job performance were job-specific and differed substantially from job to job (Kuncel, Hezlett, & Ones, 2004). This premise, known as situational specificity, was challenged by the research of Schmidt and Hunter (1977) who demonstrated that the variability of research results in job performance studies were primarily due to sampling error and other statistical artifacts (e.g., range restriction). The authors introduced a new

research method, the meta-analysis, that allowed researchers to statistically analyze research results from multiple studies and correct study findings for problems such as the unreliability of measures, range restriction, and sampling errors. Meta-analytic procedures have allowed subsequent researchers to analyze the validity of many selection criteria and methods and provide evidence of the generalizability of findings across jobs, situations, and settings (Kuncel et al., 2004). These meta-analytic studies also resolve questions raised by conflicting research results and provide reliable guidance to practitioners that adopt evidence-based management practices (Le et al., 2007).

Schmitt et al. (2003) advocate for selection systems that differentiate between two major determinants of job performance: *can-do* factors and *will-do* factors. Can-do factors include GCA, lower order abilities (e.g., spatial perception, math and verbal abilities, reasoning, etc.), and physical abilities. Will-do factors include personality dimensions and personal integrity. Based largely on the job performance model of Campbell and his colleagues (Campbell, 1990, 1999; Campbell, McCloy, Oppler, & Sager, 1993), Schmitt et al. (2003) theorize that job performance is determined by three factors: (a) declarative knowledge (i.e., knowledge about facts and things), (b) procedural knowledge (i.e., knowledge and skills necessary to perform various activities), and (c) motivation (i.e., the choice to expend effort, the choice of level of effort to expend, and the choice to persist the level of effort expended). In turn, the authors identify a number of core applicant attributes that determine these three factors: (a) GCA to determine declarative knowledge, (b) perceptual speed and psychomotor abilities to determine procedural knowledge, and (c) stable dispositional or personality traits (e.g., conscientiousness, emotional stability, and goal orientation) to determine motivation.

Finally, the authors assert that the three factors may interact with each other or serve as moderators in influencing job performance (Schmitt et al., 2003).

The works of Schmitt et al. (2003) and Campbell and his colleagues (Campbell, 1990, 1999; Campbell et al., 1993) provide a theoretical basis for the design of selection systems. However, these systems are costly endeavors, and organizations must make resource allocation choices that determine the use of selection criteria and methods (Cole et al., 2003b). Utility theory has been used to explain how organizations make such decisions (Boudreau, 1991). Utility analysis is defined as “the process that describes, predicts and/or explains what determines the usefulness or desirability of decision options, and examines how that information affects decisions” (Boudreau, 1991, p. 622). In the context of personnel selection, researchers posit that organizations establish selection criteria and methods in order to minimize selection risk (i.e., the risk of a *bad hire*) and rationalize hiring decisions (Boudreau & Ramstad, 2003). In this process, organizations establish a greater number of selection methods as selection risk increases (e.g., for executives with higher salaries and greater job complexity). Wilk and Cappelli (2003) confirmed that organizations utilize a greater number of selection methods as the skill requirements, pay, and level of formal training for positions increases.

#### Personnel Selection Criteria

The study of variables that impact job performance has a long history in the I/O psychology field (Schmitt et al., 2003; Viswesvaran & Ones, 2010). Research in this area has identified a number of factors that predict job performance or other important job-related outcomes. These factors, typically utilized as personnel selection criteria, include GCA, physical abilities, personality dimensions, education level, experience, various

forms of fit (e.g., person-job fit, person-group fit, and person-organization fit, etc.), motivation, personal integrity, and alternative intelligence constructs (e.g., emotional intelligence, practical intelligence, and cultural intelligence; Gatewood et al., 2008; Schmitt et al., 2003; Viswesvaran & Ones, 2010).

The establishment of selection criteria involves the identification of constructs that measure the KSAOs of the job, demonstrate differences among applicants, and predict job performance and/or other job-related outcomes (Viswesvaran & Ones, 2010). According to Viswesvaran and Ones (2010), the mix and use of criteria in selection decision-making should be based largely on the consistency of measurement (i.e., reliability of the criterion) and the criterion-related validity (i.e., usefulness of the criterion in predicting job performance) of such measures. Given the vast amount of published selection research and its broad range of conclusions, the authors encourage practitioners to utilize the results of meta-analyses in selecting such criteria (Viswesvaran & Ones, 2010). However, descriptive studies have shown that employers actually establish selection systems based on resource constraints, legal concerns, industry, perceived applicant reactions, existing diffusion of practices in the HR field, and the knowledge of HR professionals in organizations rather than research-validated results (Konig et al., 2010; Rynes, 2012; Rynes et al., 2002; Rynes et al., 2007; Terpstra & Rozell, 1997).

The following subsections review the research-based evidence on the reliability and validity of personnel selection criteria that are broadly researched and utilized in practice. Adopting the guidance of Viswesvaran and Ones (2010) and Le et al. (2007), the review primarily covers the results of meta-analytic research studies. Although other

selection criteria may be utilized by organizations (e.g., creativity), the research to support their broad use in selection is scarce (Viswesvaran & Ones, 2010). While capabilities such as creativity, agility, or continuous learning may be necessary for job performance in the 21st Century (Dries et al., 2012; Florida, 2004; Pink, 2005; Trilling & Fadel, 2009), the research to support these criteria in hiring is still in the formative stage (Suh & Shin, 2005; Viswesvaran & Ones, 2010).

### *General Cognitive Ability*

GCA is the most robust and generalizable predictor of job performance (Schmidt, 2002; Schmidt & Hunter, 1988). GCA is a distinct construct from intelligence: a term viewed by laymen to imply genetic potential (Schmidt, 2002). Schmidt (2002) defines GCA simply as the *ability to learn* and conceives of it as a developed ability rather than an innate one. Kuncel et al. (2004) summarize a number of findings related to the importance of GCA in predicting job performance. The authors note that GCA has been demonstrated to predict job performance across jobs primarily through its impact on learning and job knowledge. At a more detailed level, GCA positively influences the acquisition of job knowledge (i.e., declarative knowledge), skills (i.e., procedural knowledge), and motivation. All of these dimensions have a strong and positive impact on job performance, particularly in complex jobs that require rapid knowledge acquisition and information processing (Kuncel et al., 2004). Finally, GCA has been demonstrated to be a strong predictor of training performance, occupational level, and income in both cross-sectional and longitudinal studies (Schmidt & Hunter, 2004).

GCA has consistently been found to demonstrate the highest correlations with and predictive validities of job performance across all jobs and settings when compared with

other personnel selection criteria (Schmidt, 2002). Based on a meta-analysis of 425 individual studies, Hunter and Hunter (1984) reported a strong correlation between GCA and supervisor ratings of job performance for high complexity jobs. Based on a more contemporary procedure used to correct for range restriction in meta-analyses, Schmidt et al. (2008) found an increase of 17% in the validity coefficient originally reported by Hunter and Hunter (1984). The adjusted validity estimate between GCA and job performance for high complexity jobs was .68 ( $N = 2,455$ ).

While GCA has been demonstrated to be the most significant predictor of job performance and a number of other favorable job outcomes, its formal use in selection in the United States is limited. U.S. employers are reticent to use GCA as a selection criterion since African-Americans and Hispanics have been shown to perform at lower levels than Whites in GCA testing (McDaniel, 2009). The EEOC has rejected the use of generalizable validity findings that support the use of GCA in selection and has successfully sued a number of companies for discriminatory practices based on their use of GCA testing in selection processes (McDaniel, Kepes, & Banks, 2011). In reviewing 10 years of court cases involving selection processes and tools, Williams et al. (2013) found that employers lost 90% of the cases (including out of court settlements) and incurred an average payout to plaintiffs of \$1.5 million per case. The \$8.55 million settlement between the EEOC and the Ford Motor Company, related to the company's use of a validated GCA test for apprentice program selection (Employment Tests and Selection Procedures, 2013), provides a good example of the legal risks that employers take when using GCA as a primary criterion in selection. As such, the Uniform



Guidelines and EEOC legal actions have had a chilling effect on the use of GCA as a selection criterion in the United States (McDaniel et al., 2011).

### *Personality Factors*

The use of personality assessments in selection processes has become a widespread practice among U.S. employers (Rothstein & Goffin, 2006). Personality factors, defined as “enduring dispositions that cause characteristic patterns of interaction with one’s environment” (Parks & Guay, 2009, p. 675), are theorized to predict job performance through interactions with motivational processes (Barrick, Mount, & Judge, 2001). Measures of personality have been linked to a number of job-related outcomes including job performance, teamwork, leadership, and job and career satisfaction (Ones, Dilchert, Viswesvaran, & Judge, 2007). Until the early-1980s, most researchers concluded that personality factors had no impact on job outcomes (Barrick & Mount, 1991). With the emergence and acceptance of the five-factor model (FFM) of personality, researchers were better able to examine the impacts of personality on job outcomes utilizing this parsimonious and coherent taxonomic structure (Barrick et al., 2001; Parks & Guay, 2009). The FFM establishes five personality factors: (a) extraversion (i.e., outgoing, assertive), (b) emotional stability (i.e., calm under pressure, not neurotic), (c) agreeableness (i.e., cooperative, loyal), (d) conscientiousness (i.e., responsible, dependable), and (e) openness to experience (i.e., curious, imaginative; Barrick & Mount, 1991).

The formative meta-analysis of the impact of FFM factors on job performance was conducted by Barrick and Mount (1991) based on 117 individual studies. The authors found weak or non-significant correlations between most of the FFM factors and

job performance as shown in Table 1. However, conscientiousness was found to be positively related to job performance with a small correlation for all job groups and criteria types (i.e., broadly generalizable). The theory of conscientiousness is that it taps into underlying traits that are important to the accomplishment of tasks in all jobs. While such results are significantly weaker than those shown for GCA, researchers have noted that certain personality factors (e.g., conscientiousness) can provide incremental predictive validity to GCA when used in a coordinated fashion (Ones et al., 2007).

Table 1 *Correlation Coefficients Between Personality Factors, Job Performance, and Intent to Quit*

| Personality Factor  | Job Performance for Managers (a) | Intent to Quit for All Job Types (b) |
|---------------------|----------------------------------|--------------------------------------|
| Conscientiousness   | .25*                             | .12*                                 |
| Extraversion        | .21**                            | -.03                                 |
| Emotional Stability | .09                              | .02                                  |
| Agreeableness       | .10*                             | .09*                                 |
| Open to Experience  | .10                              | -.08*                                |

Sources: (a): Barrick et al. (2001); (b) Barrick & Mount (1991)

\*  $p < .10$

\*\*  $p < .05$

Over 15 meta-analytic studies of the relationship between personality factors and job performance were conducted through 2001. Barrick et al. (2001) summarized the cumulative findings of these studies and found that conscientiousness and emotional stability were valid predictors of job performance across jobs and situations. Further, the

authors found that certain personality factors were better predictors of job performance or other job-related outcomes (e.g., training performance) for certain jobs or settings. For managerial positions, extraversion, agreeableness, and conscientiousness were found to be valid predictors of job performance with modest corrected correlations (Barrick et al., 2001). Table 1 contains the correlation coefficients reported by Barrick et al. (2001).

Subsequent to these published meta-analyses, researchers have debated the utility of personality assessments in personnel selection. Some researchers have expressed concerns over the low reported validities of personality measures and issues with validity correction procedures used in meta-analyses (Morgeson et al., 2007a; Morgeson et al., 2007b). Other researchers have advocated for the use of personality assessments in selection processes and point to incremental validity over GCA and linkages to other desirable organizational outcomes such as job satisfaction and organizational commitment (Ones et al., 2007; Tett & Christiansen, 2007). While the utility of personality assessments is unresolved among researchers, their use in selection among U.S. employers is widespread. Rothstein and Goffin (2006) report that 30% of U.S. employers utilize personality assessments in their personnel selection systems.

### *Fit*

Four forms of applicant fit are used by employers as selection criteria during the hiring process: person-job (PJ fit), person-group (PG fit), person-supervisor (PS fit), and person-organization (PO fit; Kristof-Brown et al., 2005). The general construct of fit is defined as the level of compatibility between an individual and her job, supervisor, work group, or organization (Kristof-Brown et al., 2005). Fit is commonly conceptualized and measured as the level of match or congruence between a job applicant's knowledge,

skills, abilities, needs, personality, and values and the demands of the job (PJ fit), the values or personality of the supervisor (PS fit), the goals and values of the work group (PG fit), and/or the values, culture, and climate of the organization (PO fit; Cable & Judge, 1997; Edwards, 1991; Kristof-Brown, 2000; Kristof-Brown et al., 2005).

While all four forms of fit may be assessed during hiring processes, their theoretical relationships with job performance vary. PJ fit is theorized to contribute to job performance through the knowledge, skills, and abilities (KSAs) of the individual (Edwards, 1991). In contrast, PO fit is theoretically linked to heightened levels of organizational commitment and minimized levels of intent to quit (Kristof, 1996; Westerman & Cyr, 2004). PG fit is theorized to impact job performance at the work group level through interpersonal interactions and complementary or supportive qualities or characteristics (Werbel & Johnson, 2001). Finally, there is no clear theory that describes the pathways or manner in which PS fit impacts job performance or other job-related outcomes (van Vianen, Shen, & Chuang, 2011).

A large number of studies have focused on PJ fit and its impacts in organizations; however, most of them examined the relationship between PJ fit and job satisfaction or other well-being outcomes (Edwards, 1991). Studies conducted by Kristof-Brown and her colleagues have focused on the use of PJ fit by hiring personnel and its impact on job performance. In a study of 31 recruiters, Kristof-Brown (2000) examined their judgments of PJ and PO fit and their impacts on hiring recommendations. She found that recruiters utilized different information to assess PJ and PO fit and that both types of fit provided unique predictions in recruiters' hiring recommendations. Recruiters used judgments of an applicant's KSAs compared with job demands to assess PJ fit (Kristof-

Brown, 2000). In a meta-analysis of all four types of fit and related outcomes, Kristof-Brown et al. (2005) found that PJ fit had strong correlations with job satisfaction and intent to quit but a small correlation with job performance. However, the job performance correlation was not found to be significant. Finally, the authors found a strong correlation between PJ fit and an organization's intent to hire (Kristof-Brown et al., 2005). Table 2 contains the reported correlation coefficients reported by Kristof-Brown et al. (2005).

Table 2 *Correlation Coefficients Between Fit, Job Performance and Other Outcomes*

| Criterion  | Job Performance | Job Satisfaction | Organizational Commitment | Intent to Quit |
|------------|-----------------|------------------|---------------------------|----------------|
| PJ Fit (a) | .20             | .56*             | .47*                      | -.46*          |
| PO Fit (b) | .15*            | .36*             | .31*                      | -.25*          |
| PG Fit (a) | .19*            | .31*             | .19                       | -.22*          |
| PS Fit (b) | .18             | .44*             | .09                       | no data        |

Sources: (a): Kristof-Brown et al. (2005); (b): Arthur, Bell, Villado, & Doverspike (2006). \* p < .05

PO fit has been the focus on many studies within the personnel selection domain, particularly in response to the changing nature of jobs and the need for flexible employees (Westerman & Cyr, 2004). PO fit is typically assessed by hiring personnel based on their judgments of the personality traits and values of the applicant in comparison to the culture and values of the organization (Kristof, 1996). In a study conducted by Adkins, Russell, and Werbel (1994), the authors found that PO fit is a distinct construct assessed by hiring personnel and that their judgments of PO fit

determined an applicant's invitation for a second interview. They also found that the perceived congruence of values between hiring personnel and applicants had a significant impact on judgments of PO fit. As such, selection biases including *similar to me* and *similar to ideal* appear to be important determinants of the PO fit judgments of hiring personnel. Similarly, Cable and Judge (1997) found that hiring personnel perceptions of PO fit were a key determinant of which applicants received job offers. When applicants received a PO fit rating of 4 on a 5-point Likert scale, they were 44% more likely to receive a job offer.

In the meta-analysis conducted by Kristof-Brown et al. (2005), PO fit demonstrated the highest correlations with organizational commitment, intent to quit (negative effect), and job satisfaction. The correlation between PO fit and job performance was small and was not significant, but PO fit was found to have a large and significant effect on intent to hire. A subsequent meta-analysis conducted by Arthur, Bell, Villado, and Doverspike (2006) focused on the use of PO fit as a criterion in selection decision-making and its theoretical and empirical linkages to job performance. The study reported modest correlations between PO fit of and job performance, turnover, and work attitudes as shown in Table 2. Further, the results demonstrated that the criterion-related validity of PO fit did not generalize as a predictor of job performance. The authors suggested that the small impact of PO fit on job performance was most likely attributable to intermediary attitudinal variables and concluded that:

in using P-O fit to make selection decisions, organizations may (inadvertently) be selecting individuals on basis [sic] of subsequent employee well-being (e.g., satisfaction) instead of job performance. Whereas many organizations may deem

employee well-being to be an important and desirable outcome, it appears, in our opinion, to be a rather tenuous basis for selection decisions. (Arthur et al., 2006, p. 797)

PG and PS fit have been less frequently studied in the personnel selection research domain (Kristof-Brown et al., 2005). In the meta-analysis conducted by Kristof-Brown et al. (2005), PG and PS fit were found to correlate with job performance with small effect sizes; however, the correlation for PS fit was not significant. Both of these forms of fit demonstrated stronger relationships with job satisfaction.

Several researchers have suggested that various forms of fit are assessed in applicant interviews (Adkins, Russell, & Werbel, 1994, Cable & Judge, 1997; Rynes & Gerhart, 1990); however, there is little information on the use of fit assessments in actual selection contexts (Sackett & Lievens, 2008). While the research results discussed above indicate that fit assessments may impact hiring decisions, all four forms of fit show modest or insignificant relationships with job performance. Further, Arthur et al. (2006) note that the weakness of the relationship between PO fit and job performance makes it an uncertain criterion for selection and observe that its use may violate EEOC guidelines: an argument that could be equally true for the use of PS fit in selection contexts.

### *Motivation*

While many researchers agree that motivational factors play an important role in the relationship between traits (e.g., personality factors) and job performance, the theoretical and empirical research in this area is considerably less robust or conclusive when compared to the cumulative research on other selection criteria (Judge & Ilies, 2002; Kanfer & Ackerman, 2000; Parks & Guay, 2009). The lack of a consistent

taxonomic structure of motivation has hampered researchers' abilities to compare research results across studies and provide useful guidance to the practitioner community (Kanfer & Ackerman, 2000). Further, the complexity of the relationships between motivation, personality factors, and values have impeded researchers' abilities to ascertain their combined impacts on job performance (Parks & Guay, 2012).

Work motivation is defined as "a set of energetic forces that originate both within as well as beyond an individual's being, to initiate work-related behavior and to determine its form, direction, intensity, and duration" (Pinder, 1998, p. 11). Thus, motivation is a psychological process that results from the interaction of the individual and the environment (Latham & Pinder, 2005). Although motivation is a construct in and of itself, it is tightly bound to goal setting, values<sup>9</sup>, and personality factors from both theoretical and empirical perspectives (Kanfer & Ackerman, 2000; Parks & Guay, 2009). Based on a review of these constructs and the results of a meta-analysis performed by Parks (2007), Parks and Guay (2009) proposed a model that accounts for the various factors that influence motivation. The model posits that personal values, particularly the achievement value domain<sup>10</sup>, drive goal development and content. Once goals are established, the content of the goal and personality factors determine the extent to which the goal is pursued (i.e., goal striving). Consequently, goal striving determines goal accomplishment (i.e., performance; Parks & Guay, 2009).

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<sup>9</sup> Schwartz (1994) defines a value as composed of five features including "a (1) belief (2) pertaining to desirable end states or modes of conduct, that (3) transcends specific situations, (4) guides selection or evaluation of behavior, people, and events, and (5) is ordered by importance relative to other values to form a system of value priorities." ( p.20)

<sup>10</sup> The ten value domains are: 1) power, 2) achievement, 3) hedonism, 4) stimulation, 5) self-direction, 6) universalism, 7) benevolence, 8) conformity, 9) tradition, and 10) security. The achievement domain includes values such as ambition, competence, accomplishment, and success (Schwartz, 1994).



The Parks and Guay (2009) model was tested in a study of academic test performance with 266 undergraduate students (Parks & Guay, 2012). Utilizing path analysis, the authors found that achievement values influenced goal content in a significant manner. Further, the study found that conscientiousness and goal content had a significant influence on goal striving (Parks & Guay, 2012). These results suggest that motivation is indeed a multi-faceted construct in which both personal values and personality factors contribute to goal development and pursuit through which performance is ultimately achieved.

The works of Parks and Guay (2009, 2012) reinforce earlier results in the work motivation domain and provide a greater explication of the underlying factors of the construct. An earlier meta-analysis conducted by Judge and Ilies (2002) found strong correlations between several personality factors and three of the most commonly studied motivation theories: (a) goal-setting theory, (b) expectancy theory, and (c) self-efficacy theory. The authors findings included: (a) neuroticism consistently had a negative influence on all three forms of motivation, (b) conscientiousness had a consistently positive influence on all three forms of motivation, and (c) extraversion had a positive and significant influence on self-efficacy motivation (Judge & Ilies, 2002). In combination, the theoretical and empirical research on work motivation provides some insight to its potential impact on job performance. However, given the formative state of motivational taxonomies in the I/O field, a significant amount of research is needed to provide support for the use of values as a hiring criterion including the manner and extent to which values and personality factors influence goal setting, goal striving, and job performance (Parks & Guay, 2012).

## *Education*

Education is a prerequisite or screening criterion that is frequently used by employers during the hiring process (Ng & Feldman, 2009). While education may include a number of components or sources (e.g., vocational schools, college courses, formal employer-sponsored learning), education is typically conceived and measured as *education level*, or the academic credentials or degrees that an applicant has obtained (Ng & Feldman, 2009). In the hiring context, education level is used by employers as a proxy for cognitive skills and motivation (Hatch & Dyer, 2004) or as an indicator of an applicant's potential productivity (Benson, Finegold, & Mohrman, 2004). Thus, when employers utilize education level as a selection criterion, they are assessing the underlying constructs of GCA and motivation: an applicant's ability to learn (Schmidt, 2002) and willingness to initiate and sustain work-related behaviors (Pinder, 1998). Consequently, education level is a multi-dimensional selection criterion that is used as a proxy for other hiring criteria constructs.

Educational level is a selection criterion that has received little attention in the I/O psychology literature (Ng & Feldman, 2009). From an economic perspective, Mincer (1958) examined the impact of education on earnings and found that an additional year of schooling yielded a net increase of 11.5% in annual earnings. Subsequent theory building on education posited two key positions: (a) that education was a form of human capital development that resulted in economic growth and (b) that education was merely a signal to employers that had no real economic benefit (Kroch & Sjoblom, 1994). Based on analyses of large economic datasets from the 1960s and 1970s, Kroch and Sjoblom

(1994) found greater support for education as a form of human capital rather than as a signaling device.

Traditionally, little theory existed to explain the impact of academic performance on job performance (Roth, BeVier, Switzer, & Schippmann, 1996). The formative research on education focused primarily on the use of college grades to predict job performance. Nelson (1975) argued that jobs require skills that are not learned in college; therefore, college grades are not a good predictive measure for job performance. Reilly and Warech (1993) asserted that the variance in grades among colleges and universities make them unreliable predictors of job performance. Counter to these arguments, a meta-analysis conducted by Roth et al. (1996) of 71 individual studies found a medium correlation between college grades and job performance. The authors also found that studies conducted after 1960 demonstrated significantly lower correlations between grades and job performance than those conducted prior to 1960. Further, they found that the magnitude of the impact of grades on performance weakened as the number of years of job experience increased (Roth et al., 1996).

Utilizing more contemporary data sources and measures, Ng and Feldman (2009) conducted a meta-analysis of the impact of education level on job performance utilizing the results of 293 previously-conducted empirical studies. The authors integrated a number of improvements in measures of education level and job performance<sup>11</sup> and grounded the study firmly in theory and previous research results. Ng and Feldman

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<sup>11</sup> A contemporary measure of job performance was utilized and was composed of three dimensions: (a) core task performance, (b) citizenship behaviors, and (c) counterproductive work behaviors. Most previous selection studies have only included core task performance in the measurement of job performance (Ng & Feldman, 2009).

(2009) explicated the theory of the education-job performance relationship through a review of literature. They developed a broadened theoretical model of the relationship that noted the following: (a) individuals who possess higher levels of education also possess higher levels of both fluid intelligence (e.g., abstract reasoning, information processing, and working memory) and crystallized intelligence (e.g., general knowledge and verbal comprehension), (b) education promotes the growth of crystallized intelligence, (c) college experience further improves intelligence through stimulation and knowledge acquisition, (d) education promotes core task performance through the accumulation of declarative and procedural knowledge that is utilized on the job, (e) education level contributes to work values that are necessary for job performance, and (f) education level contributes to an achievement orientation associated with job performance (Ng & Feldman, 2009). These linkages between education and job performance are influenced and consistent with the work of Schmitt et al. (2003) and the works of Campbell and his colleagues (Campbell, 1990, 1999; Campbell et al., 1993) that were discussed previously in this chapter.

Ng and Feldman (2009) found that education level was positively related to both core task performance and organizational citizenship behaviors (OCB) and negatively related to counterproductive work behaviors. The most substantial corrected correlation between education level and core task performance was when the performance measures were objective; however, the correlation was still small,  $r_c(4,685) = .24, p < .05$ . Similarly, the corrected correlations for OCB were also small and moderated by OCB-type (e.g., directed at tasks) and the source of the rating (e.g., self, supervisor, or peers). The authors found that the relationship between educational attainment and job

performance was stronger for high complexity jobs (e.g., explaining an additional 1% and 14% variance in core task performance and counterproductive work behavior results respectively) and did not weaken as job or organizational tenure increased. For managers, Ng and Feldman (2009) found moderation between education level and core task performance (i.e., no difference in the relationship for managers when compared to non-managers); however, educational level was a significant moderator of OCB in a negative direction (e.g., the more educated the manager, the less likely he/she is to engage in OCB). These results led the authors to conclude that education level is a valid and robust predictor of job performance and a cost-effective screening device in selection (Ng & Feldman, 2009).

### *Experience*

A job applicant's previous work experience is one of the most common screening criteria used in the hiring process (McDaniel et al., 1988). Previous work experience is perceived by employers to result in the development of valuable knowledge and skills that can be applied by individuals in other organizational settings (Dokko et al., 2009). From a theoretical perspective, work experience shares the same causal pathway as GCA in predicting job performance through the acquisition of knowledge and performance capabilities (McDaniel et al., 1988). In summary, work experience is a multi-dimensional hiring criterion that is used as a proxy for knowledge and skills (Dokko, et al., 2009) and as a biodata source to inform hiring decisions (Brown & Campion, 1994; Cole et al., 2007).

The widespread use of experience as a hiring criterion predates the major research studies that support its use. However, four meta-analyses conducted during the last two

decades of the 20<sup>th</sup> Century consistently found positive relationships between experience and job performance (Quinones, 2004). The strength and consistency of these results have led researchers to endorse the use of the previous experience as a valid hiring criterion. As Quinones (2004) concludes, “the experience-performance relationship is positive regardless of the type of performance measure used. This evidence supports the widespread use of the construct as a criterion for selection into organizations” (p.124).

Quinones (2004) identified four meta-analyses as the key supporting research for the use of experience as a hiring criterion. These meta-analyses are reviewed below.

1. Hunter and Hunter (1984): a study that examined the relationship between previous experience and various performance outcomes for entry-level jobs. The authors reported a small correlation between previous experience and job performance.
2. Schmidt, Hunter, and Outerbridge (1986): a study that examined the effects of job experience on job knowledge and performance for four low-level military jobs. The authors found a medium correlation between job experience and job knowledge and a small correlation between job experience and performance.
3. McDaniel et al. (1988): a study that examined the relationship between previous occupational experience and job performance for a broad sample of jobs. The authors found positive correlations between experience and performance for all job types and reported a small correlation for high complexity jobs (classification based on scales from the Dictionary of Occupational Titles from the U.S. Department of Labor). The authors also found that the correlations weakened as the number of years of job experience

increased. For high complexity jobs, the correlation drops from a medium effect size when experience is less than three years to a small effect size when experience is 12 years or greater.

4. Quinones, Ford, and Teachout (1995): a study that examined the job experience-performance relationship for a diverse group of jobs. The authors found a small correlation between job experience and performance.

These four studies use different measures for capturing the experience variable utilized in the analyses<sup>12</sup>. For example, the Schmidt et al. (1986) study defines the experience variable as “experience in the present job or highly similar jobs, not on [*sic*] experience in work settings or the labor market generally” (p. 432). This definition is generally considered to measure *job experience*. In contrast, the McDaniel et al. (1988) study defines the experience variable as “length of experience in a given occupation” (p. 327). This definition is considered to measure *previous occupational experience* including both work experience in the current position as well as experience in jobs in the same or other organizations for a given occupation. Finally, the Quinones et al. study (1995) used three measures of experience including task (i.e., magnitude of repeated tasks), job (consistent with Schmidt et al., 1986), and organization (i.e., organizational tenure).

A subsequent meta-analysis conducted by Sturman (2003) examined the relationships between job experience, organizational tenure, age, and performance. Based on a broad sample of jobs, the author found that the correlation between job experience and performance for high complexity jobs (classification based on scales from

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<sup>12</sup> Note: the experience variable is not defined in the Hunter and Hunter (1984) study.

the Dictionary of Occupational Titles from the U.S. Department of Labor) increased as the mean level of job experience increased. The correlation between job experience and performance for high complexity jobs was small when the mean level of job experience was one year but increased when the mean level of job experience was 15 years (Sturman, 2003). However, the measure of experience utilized in the Sturman (2003) study was not the same as the measure used in the McDaniel et al. (1988) study. As such, the Sturman (2003) study results cannot be reasonably interpreted as confirmation of the McDaniel et al. (1988) findings.

Since the Sturman (2003) study, no large-scale analyses of the experience-performance construct have been conducted and published in the research literature (Viswesvaran & Ones, 2010). A few academic articles have questioned the use of previous work experience as a hiring criterion when experience is measured in a purely quantitative manner (e.g., a job requirement for 10 years of previous work experience). Building on the conceptual framework of work experience proposed by Quinones et al. (1995), Tesluk and Jacobs (1998) concluded that work experience should be conceptualized as consisting of both qualitative and quantitative components. They note that a number of studies have found that time-based measures of previous work experience (i.e., tenure in a job) ignore important developmental events during an applicant's career (e.g., challenging assignments) that may contribute to job performance (Tesluk & Jacobs, 1998). The authors build a compelling argument that work experience can have vastly different impacts on individuals' levels of development and learning, even for two individuals in the same job. Tesluk and Jacobs (1998) conclude that:



For supervisory and other jobs that involve higher levels of complexity and less standardization, simply increasing the amount of time spent in the job may not provide enough opportunities for detailed and higher level job knowledge and skill development. The content of work experience needs to be considered and this necessitates attention to the qualitative aspects of work experience. (p. 345)

The dynamics of how previous work experience influences job performance was the focus of a study conducted by Dokko et al. (2009). The study analyzed the impacts of previous occupational experience on the job performance of three non-supervisory line jobs in two call centers of a major property and casualty insurance company in the United States. The authors found that previous occupational experience had both positive and negative effects on job performance. First, the authors found a strong indirect impact of previous occupational experience on job performance (Dokko et al., 2009). This impact, wherein experience impacts performance through knowledge and skill accumulation, is consistent with the indirect path theory established in Schmidt et al. (1986) and the results of the meta-analytic studies reviewed above. In addition, the authors found negative effects of prior occupational experience when they controlled for knowledge and skill (Dokko et al., 2009). They attributed these negative effects to the transference of norms, cognitive schemas, and scripts developed during previous employment to the new organization. The negative impacts of previous occupational experience were moderated by adaptive behaviors and cultural fit. In situations where adaptive behavior and cultural fit were high, the negative effects of previous occupational experience were minimized (Dokko et al., 2009).

The majority of studies examining the experience-performance relationship have utilized variables that measure experience in the current position and ignore the positive and negative effects of previous work experience (Dokko et al., 2009). Among the five meta-analyses reviewed above, the only study that utilized a variable that captured previous work experience (i.e., previous occupational experience in other organizations) was the McDaniel et al. (1988) study. As such, the McDaniel et al. (1988) study is the only published meta-analytic research that properly supports the use of previous work experience as a hiring criterion. The results of the study, however, may have limited applicability in the contemporary hiring environment due to the age of the underlying data (1970s and 1980s) and the measure of job performance utilized (task performance). Nonetheless, previous work experience is utilized as an important hiring criterion by employers, particularly for experienced applicants (Rynes et al., 1997).

### *Emerging Criteria*

Several hiring criteria based on *new intelligence constructs* have emerged in the applicant selection domain and are being utilized by employers in the hiring process (Viswesvaran & Ones, 2010). These criteria include emotional intelligence (EI), practical intelligence (PI), and cultural intelligence (i.e., global mindset). EI has been generally defined as the ability to discern and manage emotions (Viswesvaran & Ones, 2010). Having received a significant amount of attention in academic and practitioner publications (Goleman, 1995, 1998), EI has received consistent interest from researchers since the mid-1990s. In a meta-analysis conducted by van Rooy and Viswesvaran (2004), the authors found that EI measures showed substantial criterion-related validities. They concluded that EI criteria could be useful in personnel selection. However,

subsequent factor analyses have demonstrated that EI measures do not provide any substantial incremental validity over personality factors and GCA. Based on these results, Viswesvaran and Ones (2010) express doubt that a distinct EI construct actually exists.

PI is defined as the ability to solve problems of everyday nature with practical skills, as opposed to academic or scholastic skills (Viswesvaran & Ones, 2010). Hedlund and Sternberg (2000) introduced the PI construct as distinct from both EI and GCA. In studies conducted by proponents of PI, measures of PI did not correlate with job performance at levels higher than those reported for GCA (Viswesvaran & Ones, 2010). A meta-analysis conducted by Dichert and Ones (2004) demonstrated that PI is strongly correlated with GCA and that PI showed little incremental validity over measures of GCA.

Given the global scope of organizations, some employers have begun assessing *global mindset* in applicant selection processes (Viswesvaran & Ones, 2010). Several taxonomies of skills needed for expatriate success have been developed; however, several researchers have concluded that such skills are largely captured in existing predictors of job performance including GCA and personality factors. Further, little empirical research has been conducted to establish the skills included in such taxonomies as reliable and valid predictors of job performance (Viswesvaran & Ones, 2010).

Employers utilize a broad array of criteria to evaluate job applicants during the hiring process. While many selection criteria predict positive outcomes (e.g., job satisfaction), their use in predicting job performance is less robust. Of the selection criteria reviewed in this chapter, only GCA exhibits a strong correlation with job

performance. At the next level, previous work experience, education, and two personality factors (conscientiousness and extraversion) demonstrate modest correlations. Finally, other personality factors and all forms of fit show small or insignificant correlations with job performance. In explaining these results, personnel researchers are transparent about the fact that future job performance is not easily predicted due to large amounts of unexplained variance in most study findings (Highhouse, 2008). Human performance has been conceptualized as a function of both the individual and the environment (Lewin, 1951). Even in cases where predictor criteria exhibit strong relationships with job performance, environmental factors may have substantial impacts on individual job performance.

#### Personnel Selection Methods

Employers utilize a range of personnel selection methods in their efforts to hire applicants who have the greatest propensity for superior job performance (Gatewood et al., 2008). Selection methods are designed to facilitate the collection and processing of applicant data by hiring personnel in order to inform subsequent decision-making (Arthur & Villado, 2008; Gatewood et al. 2008). As outlined previously in this chapter, the use and mix of selection methods may be influenced by several internal and external factors (e.g., diffusion of use of the method by employers). Further, certain methods have been demonstrated to be more effective than others in assessing applicants against particular hiring criteria. For example, testing has been demonstrated to be a more reliable source of applicant personality data than resume screening (Cole, Feild, Giles, & Harris, 2009; Ryan, Ployhart, & Friedel, 1998).

When hiring personnel utilize selection methods, they make a range of judgments about the job applicant based on the data collected (Anderson & Shackleton, 1990; Brown & Campion, 1994; Burns et al., 2014; Cole et al., 2007; Dokko et al., 2009). Attribution theory provides a basis for understanding how hiring personnel evaluate applicants through causal judgments (Knouse, 1989). The theory suggests that individuals utilize informational cues to determine if past behaviors (e.g., achievements) are due to dispositional or situational factors (Fiske & Taylor, 1991). Knouse (1989) links attribution theory to several selection methods including resume evaluation, interviews, letters of recommendation evaluation, and applicant testing. In addition, hiring personnel are likely to make attribution errors (e.g., an applicant is judged to be internally motivated when their motivation is actually associated with a particular environment) due to the difficulty of accurately assessing and determining the causes of behavior (Knouse, 1989; Ross, 1977).

The causal judgments that are made by hiring personnel are also impacted by cognitive schemas and role schemas (Cole et al., 2007; Hodgkinson, 2003). Cognitive schemas are developed through previous experience and aid individuals in understanding the environment through the organization of knowledge (Hodgkinson, 2003). In the context of hiring, cognitive schemas assist hiring personnel in processing and organizing applicant data. Hiring personnel are also likely to invoke role schemas in evaluating applicants. In doing so, hiring personnel compare the applicant's attributes to a role schema that specifies how an individual in a particular role should behave (Cole et al., 2007). Cole et al. (2007) and Dokko et al. (2009) suggest that cognitive and role schemas

play important roles in the evaluation of job applicants, particularly when hiring personnel are assessing forms of applicant fit.

The following subsections review the relevant literature on the three most frequently utilized selection methods: (a) resume screening, (b) interviews, and (c) background checks (Behrenz, 2001; Bright & Hutton, 2000; Robertson & Smith, 2001; Wilk & Cappelli, 2003).

### *Resume Screening*

Applicant resume screening is frequently the first step in assessing applicants during the selection process (Brown & Campion, 1994; Cole et al., 2003a; Robertson & Smith, 2001; Russell, 2007). The process of reviewing and screening applicant resumes generally involves examining the level of fit or match between job-related attributes (e.g., required knowledge, skills, and educational expectations) and an applicant's biodata contained on his/her resume (Cole et al., 2003a). From a theoretical perspective, the resume screener (typically an HR professional or hiring manager) is attempting to predict the future job performance of the applicant based on inferences made from biodata items (Brown & Campion, 1994; Burns, et al., 2014; Cole et al., 2003a). For example, a recruiter might infer future job performance based on an applicant's educational credentials (e.g., the applicant knows accounting principles since he has an accounting degree) and the relationship between required knowledge and job performance (e.g., knowledge of accounting principles is critical to successful job performance for auditors). In the latter half of the 20th Century, studies found that a variety of applicant attributes were valued by hiring personnel when conducting resume screening: (a) abilities, (b) conscientiousness and sociability, (c) cooperation and trustworthiness, (d) sincere and

positive attitudes, (e) maturity and sense of humor, (f) interests and extracurricular activities (Brown & Campion, 1994).

The formative study of applicant resume screening was published by Brown and Campion in 1994. Utilizing a group of recruiters and hiring managers, the study assessed: (a) the capabilities of recruiters to infer applicants' abilities based on biodata items and (b) the propensity of recruiters to rate applicants differently when comparing biodata items with job requirements (Brown & Campion, 1994). Study participants rated applicants on six attributes: (a) language ability, (b) mathematical ability, (c) physical ability, (d) interpersonal skills, (e) leadership skills, and (f) motivational capacities. The authors found that recruiters judged many resume biodata items to represent applicant abilities and skills. Further, recruiters were able to distinguish among biodata items in determining the specific abilities or skills that could be inferred from each item in a reliable manner (e.g., language abilities were inferred from grades, foreign language proficiency, and Dean's list; Brown & Campion, 1994). Recruiters also inferred varying levels of applicant attractiveness based on comparing biodata items with job requirements. For example, applicants were rated higher for an accounting position if they were deemed to possess high levels of mathematical ability from biodata items (e.g., grades, Dean's list, and undergraduate major). The authors concluded that recruiters use biodata items to infer applicant abilities; however, they noted that recruiters also infer additional applicant attributes that go well beyond abilities (Brown & Campion, 1994). Recruiters' inferences on applicants' motivational capacities is a good example where a non-ability orientation is imputed from biodata items.

The majority of published research on applicant resume screening has been conducted by Cole and his colleagues (Cole et al., 2003a, 2003b, 2004, 2007, 2009). Cumulatively, the authors make a number of important observations and establish several key findings associated with resume screening practices. In the authors' initial study, they examined the relationship between the presence of biodata on the resumes of College of Business seniors and their levels of GCA and personality factors (Cole et al., 2003a). Based on the review of these resumes by recruiters, the authors found that the presence of certain biodata items such as membership in college clubs, membership in a fraternity/sorority, and supervisory experience were positively and significantly related to personality factors including conscientiousness and extraversion (Cole et al.; 2003a). The study also found that the scholastic awards biodata element correlated significantly with GCA; however, this was the only significant correlation found between the 20 resume biodata items examined and GCA (Cole et al. 2003a).

In two related studies, Cole and his colleagues analyzed college recruiters' abilities to identify the presence of biodata items discretely and make judgments of applicants' levels of GCA, personality factors, and employability (Cole et al., 2003b; Cole et al., 2004). The authors found that recruiters reliably judged the extent to which biodata items were present on resumes (Cole et al., 2003b). They also demonstrated that recruiters' inferences regarding the presence of biodata on applicant resumes were related to the levels of GCA, conscientiousness, and extraversion among applicants. Finally, the authors found that recruiters' ratings of applicant employability varied based on their judgments of personality factors and job type (Cole et al., 2004). For example, applicants perceived to possess high levels of conscientiousness were judged by recruiters as



suitable for accounting and finance positions. Whereas, applicants perceived to possess higher levels of extraversion were judged to be suitable for enterprising jobs such as marketing positions. The authors concluded that while recruiters appeared to be adept at making accurate inferences when judging academic achievement/education and social/extracurricular biodata items, they had greater difficulty in interpreting the effects of work experience on GCA and personality factors on employability (Cole et al., 2003b).

These three studies provided a foundation for two subsequent studies that utilized experienced recruiters from the Society of Human Resource Management (Cole et al., 2007, 2009). In the first study, the authors examined recruiters' perceptions of the employability of recent or impending college undergraduates based on the academic qualifications, work experience, and extracurricular activities reported on their resumes (Cole et al., 2007). The study also analyzed the relative influence of each resume biodata item on recruiters' perceptions. The authors found that applicants' academic qualifications and extracurricular activities were positively associated with recruiters' employability ratings (Cole et al., 2007). In addition, the study found that academic qualifications had the strongest effect on recruiters' perceptions of employability. When hierarchical regression analysis was performed, however, only extracurricular activities had a positive and significant impact on recruiters' employability ratings. The authors concluded that recruiters' employability ratings depend on the joint influence of all three areas of applicant resume content. Further, the authors noted that the espoused or abstract views of recruiters on the importance of resume items did not match their actual judgments in practice (Cole et al., 2007).

A final study by Cole and his colleagues analyzed the reliability and validity of experienced recruiters' judgments of applicants' personality factors based on biodata contained in upper-level undergraduate resumes (Cole et al., 2009). The authors found that recruiters were only capable of judging extraversion in a reliable and valid manner. The interrater reliability coefficients were low for the four other personality factors. Based on a comparison of recruiters' judgments and personality test results of the resume owners (i.e., the undergraduate students), no other valid relationships for personality factors were found.

Tsai et al. (2011) examined the effects of resume biodata, including academic achievement, educational background, work experience, and activities, on Taiwanese recruiters' perceptions of PJ fit, PO fit, and person-person fit (PP fit). Then, the authors examined the impacts of these fit variables on the recruiters' hiring recommendations. Using path analysis, the authors found the following significant and positive path relationships: (a) work experience to PJ fit and PO fit, (b) activities to PP fit, and (c) educational background to PJ fit and PP fit. They found no significant path relationships between academic achievement and any of the three forms of fit. In addition, Tsai et al. (2011) found that both PJ fit and PO fit had positive and significant path relationships to recruiter's hiring recommendations. In summary, the authors found that both PJ and PO acted as moderating variables in recruiters' hiring recommendations based on the biodata contained on applicant resumes (Tsai et al., 2011).

Chen, Huang, and Lee (2011) built on the collective findings of Cole and his colleagues in a study that examined the effects of resume biodata and aesthetics on the hiring recommendations of Taiwanese recruiters. The authors examined the effects of

academic qualifications, work experience, extracurricular activities, and resume aesthetics on recruiters' hiring recommendations. In contrast to Tsai et al. (2011), Chen et al. (2011) analyzed the impact of moderating variables associated with KSAOs including job-related knowledge, interpersonal skills, GCA, and conscientiousness. Using path analysis, the authors found that resume biodata items had significant and positive path relationships as follows: (a) work experience to job-related knowledge, (b) academic qualifications to GCA and conscientiousness, (c) extracurricular activities to interpersonal skills. In turn, job-related knowledge, interpersonal skills, GCA, and resume aesthetics had significant and positive path relationships with hiring recommendations (Chen et al., 2011).

Collectively, the results from Tsai et al. (2011) and Chen et al. (2011) demonstrate that the relationships between resume biodata and hiring recommendations are probably not direct. The use of resume biodata by hiring personnel seems to be reflected through a lens of hiring criteria in order to arrive at hiring recommendations. Based on these two studies, the following variables have a moderating effect between resume biodata and recruiters' hiring recommendations: (a) PJ fit, (b) PO fit, (c) PP fit, (d) job-related knowledge, (e) interpersonal skills, (f) GCA, and (g) conscientiousness (Chen et al., 2011; Tsai et al., 2011). Further, resume aesthetics have a direct relationship with recruiters' hiring recommendations as well as an indirect effect through conscientiousness (Chen et al., 2011). Given the importance of resume aesthetics in hiring decisions (Chen et al., 2011; Burns et al., 2014), Martin-Lacroux and Lacroux (2017) conducted a study on the impact of spelling errors in resumes on recruiters' employability ratings of applicants. Based on the results from 536 recruiters in France,

the authors found that applicants with error-laden resumes were 3.65 times more likely to be rejected by recruiters. Moreover, very experienced applicants were rejected at higher rates than applicants with low work experience when their resumes contained spelling errors. The results are consistent with those of Chen et al. (2011) and Burns et al. (2014): resume aesthetics and errors influence recruiters' judgments of applicant employability.

A study conducted by Burns et al. (2014) examined recruiters' judgments of applicant personality factors and hireability based on the specific biodata elements and content/formatting choices contained in resumes. Based on the review of 37 MBA student resumes by 122 HR practitioners, the authors found that student self-reports of personality were uncorrelated with hireability ratings. However, HR practitioners' *judgments* of the students' levels of conscientiousness and extraversion were significantly correlated with their hireability ratings. These judgments of personality accounted for 48% of the variance in hireability ratings (Burns et al., 2014). While the personality factors that impacted hireability ratings in this study varied slightly from the results of Cole et al. (2004, 2009), all three studies found that hiring personnel were unable to reliably judge applicant personality factors.

Given the recent trend in the creation and use of video resumes (Hiemstra & Deros, 2015), Apers and Deros (2017) conducted a study that examined recruiters' accuracy in judging applicants personality characteristics from video, audio, and paper resumes. The results demonstrated that recruiters most accurately judged extraversion from resumes regardless of format. Moreover, agreeableness was judged with low accuracy, and conscientiousness and openness were judged inaccurately (Apers & Deros

2017). In general, the findings from this study were consistent with those of Cole et al. (2009).

As the above review of research demonstrates, the significant gap in the literature on applicant resume screening has been somewhat filled. While such results are encouraging, these studies are of limited usefulness in the context of the current study. All of the studies reviewed above have examined recruiters' and hiring managers' inferences of the attributes, skills, capabilities, and fit of recent or impending college graduates based on resume biodata. However, this group of applicants only accounts for approximately 7% of all job applicants (Rynes et al., 2013). Further, many of the biodata items that are examined in these studies are dissimilar to those that appear on experienced professionals' resumes (Rynes et al, 1997). For example, an individual with ten years of work experience is unlikely to include biodata such as GPA, academic achievements (e.g., Dean's list), or collegiate extracurricular activities on her resume.

The applicant resume screening process is a critical step in the selection process. The process narrows the applicant pool to a manageable size (Chapman & Webster, 2003). This winnowing process minimizes the organization's investment in subsequent selection methods such as testing and interviewing. Furthermore, it "screens out" or eliminates applicants who are not perceived to possess the requisite KSAOs that are required to perform the job (Cole et al., 2003a; Russell, 2007). Russell (2007) suggests that this process may exclude qualified candidates, particularly when large numbers of applicants are being screened. Robertson and Smith (2001) reiterate this potential problem and state that such errors are onerous given that once an applicant is eliminated from the pool, he/she is never recovered.

## *Interviews*

Once the applicant pool has been reduced from the resume screening process, employers typically conduct interviews with surviving applicants. Interviews of applicants are a part of almost every selection process (Moscoso, 2000) and demonstrate significant levels of criterion-related validity (McDaniel et al., 1994). Anderson and Shackleton (1990) concluded that applicant interviews were primarily personality evaluations based on an ubiquitous personality criterion prototype. Their research found that recruiters' evaluations of candidates' personality attributes were highly predictive of occupational group suitability ratings and outcome decisions. The authors also found that various forms of bias (e.g., similar-to-me bias, personal liking bias, prototype bias) played important roles in recruiters' assessments of applicants (Anderson & Shackleton, 1990). They concluded that "information processing appears so flawed as to corrupt the candidate assessment purpose of the interview" (Anderson & Shackleton, 1990, p. 75).

While the research results of Anderson and Shackleton (1990) appear to invalidate the use of interviews in applicant selection, two meta-analyses have established high levels of predictive validity for applicant interviews. The first meta-analysis, conducted by McDaniel et al. (1994) from the results of 160 individual studies, examined the validity of three interview content types: (a) situational, (b) job-related, and (c) psychological. The authors found that interview content was a substantial driver of the validity of applicant interviews. Situational interviews achieved the highest validity in predicting job performance (McDaniel et al., 1994). They also found that structured interviews yielded higher predictive validities than those of unstructured interviews. A second meta-analysis performed by Huffcutt and Arthur (1994) also found that structured

interviews yielded substantial predictive validities; however, this study only included data for entry-level jobs.

In a subsequent meta-analysis, Conway et al. (1995) examined the reliability of applicant interviews based on the results of 82 previously-conducted studies. The authors reported strong to weak correlations between interviews and job performance. Higher correlation coefficients were associated with higher levels of interview structure. Further, they noted that several factors impacted the reliability of applicant interviews including structure, interviewer training, job analysis (indirect), and method of combination of interview ratings from multiple interviewers. The authors encouraged employers to utilize structured interviews and job analysis coupled with interviewer training and the mechanical combination of interview ratings (e.g., summing or averaging) to improve the reliability of applicant interviews (Conway et al., 1995).

Other studies have examined the applicant attributes that are assessed in interviews. Several studies have examined the abilities of interviewers to make reliable assessments of predictors of job performance including GCA and personality factors. In a meta-analysis conducted by Huffcutt, Roth, and McDaniel (1996) from the results of 47 previously-conducted studies, the authors found a moderate correlation between actual and interviewers' assessments of applicant GCA. The authors also found that 16% of the constructs evaluated in applicant interviews represented GCA. Finally, they concluded that structured interviews were not highly effective in evaluating an applicant's GCA level (Huffcutt et al., 1996).

Barrick, Patton, and Haugland (2000) performed a study focused on the ability of interviewers to judge applicants' personality factors accurately. The authors found that

interviewers were unable to assess the two most important job performance-related personality factors, conscientiousness and emotional stability, accurately. The reported correlations between interviewer ratings and self-ratings for conscientiousness and emotional stability were small (Barrick et al., 2000). Further, the authors found that the structure or type of interview did not improve interviewers' abilities to accurately assess personality traits. Barrick et al. (2000) concluded that "these findings further question the utility of using interviews to assess personality traits" (p. 994).

In an effort to establish a taxonomic structure for examining the constructs assessed in applicant interviews, Huffcutt, Roth, Conway, and Stone (2001) conducted a meta-analysis of 47 interview studies. They found seven key constructs that were measured in interviews: (a) mental ability, (b) knowledge and skills, (c) personality traits, (d) applied social skills, (e) interests and preferences, (f) PO fit, and (g) physical attributes. Further, the authors found that applicant interviews were saturated with three dominant constructs under measurement: (a) personality traits (35%), (b) applied social skills (28%), and (c) mental ability (16%). The authors concluded that structured interviews demonstrated higher validity and tended to focus on constructs that were more directly related to job performance such as job knowledge, interpersonal skills, and PO fit (Huffcutt et al., 2001).

In a later article, Huffcutt (2011) reviewed the empirical research on applicant interviews and developed a general model of interview ratings. First, he posited that interviews should elicit information pertaining directly to the KSAs required to perform a specific job. However, he noted that interview ratings are influenced by a number of factors that are unrelated to job performance including personal/demographic



characteristics and interviewee performance. He concluded that interviewee performance actually contributes to interviewer ratings at twice the magnitude of job-related interview content (Huffcutt, 2011). Given researchers' concerns over the reliability and validity of interviewers in assessing GCA and personality traits, Huffcutt recommended a stronger focus on core job elements (e.g., declarative knowledge, procedural knowledge, etc.) in interviews rather than a continued focus on their antecedents (e.g., GCA, personality traits, etc.).

### *Background Checks*

The final step in many selection processes is performing background checks on applicants. Schmidt and Hunter (1988) reported a small predictive validity for background checks and noted that this selection method added incremental validity of 12% when used in combination with GCA measures. While little contemporary research has been dedicated to background checks, one area that has received attention is employers' use of credit checks in selection systems (Viswesvaran & Ones, 2010). Oppler, Lyons, Ricks, and Oppler (2008) examined the propensity of governmental workers to engage in counterproductive work behaviors based on their financial history. They found a small correlation between the two factors. As such, the use background checks, including credit checks, may yield incremental validity when used in combination with other selection criteria and methods.

### *Selection Method Usage*

A survey of Fortune 1000 companies conducted in 2003 by Piotrowski and Armstrong (2006) found that most U.S.-based companies rely on traditional recruitment and selection methods such as reviewing resumes and applications, conducting reference

checks, and testing skills. Further, companies utilized pre-employment screening and personality tests on a limited basis (Piotrowski & Armstrong, 2006). Surveys of employers within the practitioner literature provide a broader perspective on the selection practices utilized in the U.S. and globally. In a survey of staffing directors globally, Development Dimensions International (DDI) found that employers utilized three applicant selection methods with significant frequency: resume screening, screening interviews, and behavioral interviews (Boatman & Erker, 2012). In a similar survey of Fortune Global 500 HR professionals, Fallow and Kantrowitz (2011) found that employers in the United States generally utilized the same selection methods as their global counterparts with the exception of pre-employment tests/assessments<sup>13</sup>. The frequency of use of hiring methods reported in these studies is shown in Table 3.

Table 3 *Frequency of Use of Selection Methods by Employers*

| Selection Method    | Piotrowski & Armstrong U.S. | Boatman & Erker Globally | U.S. | Fallow & Kantrowitz Globally |
|---------------------|-----------------------------|--------------------------|------|------------------------------|
| Application Forms   | 97%                         |                          |      | 78%                          |
| GCA Testing         |                             | 34%                      | 24%  | 64%                          |
| Personality Testing | 19%                         | 41%                      | 30%  | 66%                          |
| Knowledge Testing   |                             | 59%                      | 21%  | 71%                          |
| Skills Testing      | 50%                         |                          |      | 71%                          |
| Resume Screening    | 98%                         | 92%                      |      | 89%                          |

<sup>13</sup> The survey conducted by Fallow and Kantrowitz (2011) was restricted to SHL Previsor clients. As such, the results likely suffer from selection bias.

Table 3 Continued

|                       |     |     |
|-----------------------|-----|-----|
| Screening Interviews  | 92% | 65% |
| Behavioral Interviews | 84% |     |
| Structured Interviews |     | 80% |
| Reference Checks      | 97% |     |
| Background Checks     |     | 73% |

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According to the DDI survey results, various types of pre-employment assessments are used less frequently in the United States compared with their use globally (Boatman & Erker, 2012). For example, U.S. employers use knowledge assessments 21% of the time during the selection process compared with 59% of the time globally. Other types of pre-employment assessments (e.g., personality assessments) are administered by U.S. employers with much less frequency than employers in other countries (Boatman & Erker, 2012). Two key issues limit the use of pre-employment assessments in the United States: (a) a regulatory environment that leads U.S. employers to focus on the legal defensibility of selection processes rather than flexible and integrated solutions (Boatman & Erker, 2012; McDaniel et al.; 2011; Schmidt, 2006) and (b) a tendency among HR managers to ignore scientifically-established selection criteria and methods (Anderson, 2005; Highhouse, 2008; Le et al., 2007; Rynes, 2012). Highhouse (2008) delves into the latter issue in detail and concludes that managers and institutions (e.g., U.S. Supreme Court) in the United States exhibit a number of beliefs that limit the use of individual assessments in personnel selection including: (a) the validity of experience and intuition in evaluating job applicants, (b) continued belief in

situational specificity, and (c) skeptical views of the effectiveness of tests to reveal the underlying traits and values of applicants. While these beliefs are refuted by scientific evidence, their prevalence impacts the efficacy of personnel selection systems in the United States significantly (Anderson, 2005; Highhouse, 2008; Le et al.; 2007, Rynes, 2012; Rynes et al., 2007).

### Portability of Human Capital

The concept of general human capital implies that certain types of knowledge and skills that are obtained in one organization are transferrable or portable to others (Becker, 1993). The concept of the portability of human capital underlies several contemporary theories in areas such as knowledge workers (Drucker, 1998), career progression and mobility (O'Mahony & Bechky, 2006; Fugate, Kinicki, & Ashforth, 2004), talent acquisition (Beechler & Woodward, 2009), and knowledge transfers and spillovers (Porter, 1998, 2000; Rosenkopf & Almeida, 2003; Song, Almeida, & Wu, 2003).

Drucker (1998) summarized the key assumption of human capital portability that has influenced theory building and research in these areas, noting that “knowledge workers, unlike manual workers in manufacturing, own the means of production: they carry that knowledge in their heads and can therefore take it with them” (pp. ix-x).

The concept of human capital portability provides support for the use of hiring criteria such as previous work experience and educational attainment, and these are the typical criteria used by employers when hiring experienced applicants, including managers (Dokko et al., 2009; Ng & Feldman, 2009; Rynes et al., 1997). A number of research studies have confirmed the portability of general human capital and its application in new organizations in the insurance, financial services, telecommunications, semiconductors,

and food service industries (Almeida & Kogut, 1999; Dokko et al., 2009; Mahony et al., 2012; Rao & Drazin, 2002; Simon & Uscinski, 2012; Uppal et al., 2014). These studies included multiple job types such as semi-skilled and professional positions.

Becker's original definition of specific training implies that certain types of knowledge and skills acquired in one organization are not useful in others (Becker, 1993). Becker (1993) noted that specific training is principally concerned with activities associated with familiarizing an employee with the particular organization in which he or she works. Such training, whether formal or informal, includes acquiring "knowledge about routines and procedures, corporate culture and informal structures, and systems and processes that are unique to a company" (Groysberg et al.; 2006, p.3). Consequently, organization-specific human capital is not a portable type of human capital from a theoretical perspective (Becker, 1993).

As human capital has gained prominence in the business strategy, economics, and HR domains, a number of researchers have focused their attention on human capital portability, dynamics, and impacts. Studies have confirmed the presence of firm-specific human capital and its lack of portability in a number of occupations including biochemists (Long & McGinnis, 1981), professional baseball players (Glenn et al., 2001), executives (Groysberg et al., 2006), cardiac surgeons (Huckman & Pisano, 2006), security analysts (Groysberg et al., 2008a), technology entrepreneurs (Marvel & Lumpkin, 2007), and professional football players (Groysberg, Sant, & Abrahams, 2008). Groysberg et al. (2006) advance Becker's definitions of general and specific training by suggesting that human capital is an accumulation of a portfolio of skills and assets that have varying levels of portability and application to new jobs. The authors define five

categories of human capital as follows: (a) general management human capital, (b) strategic human capital, (c) industry human capital, (d) relationship human capital, and (e) company-specific human capital. Based on a review of the performance of 20 General Electric executives who left the company between 1989 and 2001 to become chairmen or CEOs of other companies, the authors found that all five categories of human capital impacted executive performance in their new organizations. Groysberg et al. (2006) conclude that:

When star executives switch companies, they leave an environment in which skill sets allow them to be effective. The more closely the new environment matches the old the greater likelihood of success in the new position – a factor managers would do well to consider when deciding to change jobs. They should also remember that certain skills – most likely, company-specific ones - won't be relevant in the new job and will have to be unlearned, which takes time. (p.8)

Additional research by Groysberg and his colleagues examined the portability of human capital in other professions (Groysberg, 2008; Groysberg et al., 2008a, 2008b). When examining the movement of high-performing security analysts from one firm to another, Groysberg et al. (2008a) found that these individuals experienced a drop in performance that lasted for at least two years. Further, the movement of an analyst from one firm to another had a destructive impact on the value of the acquiring organization of approximately \$24 million. The authors attributed these negative impacts to the loss of firm-specific and relational human capital by security analysts when they leave organizations (Groysberg et al., 2008a). However, the authors noted that this decline in performance could be mitigated when analysts move to organizations with better

capabilities or when they preserved relational human capital by taking colleagues with them. The conclusions of Groysberg and his colleagues are consistent with the work of other researchers who have pointed to the importance of organizational context (Long & McGinnis, 1981), organizational standards (Allison & Long, 1990), socialization tactics (Bauer, Bodner, Erdogan, Truxillo, & Tucker, 2007), and other factors (e.g., equipment, organizational processes, management, culture, and HR policies; Huckman & Pisano, 2006) in determining individual performance. Finally, Groysberg et al.'s (2008a) conclusions are bolstered by the findings of Bidwell (2012), a study conducted within a U.S. investment banking arm of a financial services institution, who found that external hires performed worse and had significantly higher turnover rates for two years when compared to their internally-promoted colleagues.

The works discussed heretofore have focused primarily on documenting the presence of various types of human capital, its portability, and organizational characteristics or conditions that allow or impede its application in new settings. Another stream of research identifies several cognitive structures that individuals acquire from work and other experiences that moderate the application of knowledge and skills in new organizational settings. For example, Gioia and Poole (1984) theorize that individuals develop cognitive scripts based on cumulative experience and rewards that influence their understanding of events and resulting behaviors. The authors suggest that these scripts are routinely referenced by individuals in decision-making and can result in efficient but poor decision-making due to fine-grained differences between current and past situations.

Based on a qualitative study of technology workers, Beyer and Hannah (2002) suggest that experienced workers bring a range of cognitions and behaviors from prior

jobs to new ones. During the socialization process in a new organization, experienced newcomers draw heavily on cognitions and behaviors that they have acquired in similar settings in the past. The authors conclude that past work experience is likely to have a strong effect on socialization in new work roles and environments (Beyer & Hannah, 2002). They posit that the socialization process for experienced individuals in new environments requires learning, acquiring new knowledge and skills, internalizing learning, and practicing new ways of thinking and behaving. Beyer and Hannah (2002) also conclude that the diversity of experience possessed by some newcomers provides them with greater resources to deal with new challenges and task demands as compared to their narrowly experience peers who have possessed the same job or a series of similar jobs during their careers. Finally, the authors note that the similarity of occupational cultures and industry cultures may make transitions easier for individuals due to the congruity of internalized beliefs, values, and expected behaviors.

Higgins (2005) has established the construct of career imprints defined as a “set of capabilities and connections, coupled with the confidence and cognition that a group of individuals share as a result of their career experiences at a common employer during a particular period in time.” (p. 4). Career imprints are often formed based on experiences that occur early in an individual’s career, but they last well beyond the period of time the individual works in the organization. While Higgins’ (2005) research largely focuses on the positive impacts of career imprints in the development of the biotechnology industry, she notes that imprints may clash with particular jobs or industries when individuals enter new organizational settings. Higgins (2005) concludes that a manager’s career imprint has an enormous bearing on what an individual brings to a new job and that it can



determine both behavior and performance. In essence, career imprints are sustained cognitive structures typically based on early career experiences that determine an individual's mindset and behaviors in subsequent jobs and organizational settings.

Two reviews of the practitioner and research literature on talent management identify concerns related to the continued advocacy of researchers and authors for human capital strategies such as *topgrading* and *hiring stars* (Beechler & Woodward, 2009; Eriksen, 2012). Beechler and Woodward (2009) observe that talent management advocates, driven by the mantra of the global *war for talent*, resist disconfirming evidence that indicates that performance is not always portable from one organization to another. Eriksen (2012) similarly concludes that the majority of the extant literature in this area has been focused on the attraction of high-performing employees; however, he states that the transition from one organization to another may not be a smooth one. Noting that new employees have a propensity to voluntarily leave the organization early due to poor fit, Eriksen asserts that the gains and losses from talent acquisition are likely to derive from the management of the talent mix and whether the organization achieves alignment between its talent, resources, and organizational design. Beechler and Woodward (2009) and Eriksen (2012) conclude that the portability of human capital from one organization to another is unlikely to be a straightforward and uneventful process for individuals or organizations. As Groysberg et al. (2006) concluded, certain organization-specific skills will not be relevant to performance in a new organization, and those skills will have to be un-learned.

As noted earlier in this chapter, the concept of the portability of general human capital undergirds several economic and human performance theories. This concept also

provides theoretical support for the development of hiring criteria utilized by employers (Beechler & Woodward, 2009; Groysberg & Lee, 2008). Michaels, Handfield-Jones, and Axelrod (2001) define talent as “the sum of a person’s abilities... his or her intrinsic gifts, skills, knowledge, experience, intelligence, judgment, attitude, character and drive” (p.xii). One of the key premises of general human capital is that these attributes are posited in the individual and are transferrable across organizational boundaries. As such, hiring criteria that focus on assessing the KSAOs of applicants are supported by the portability concept and include GCA, personality factors, fit, motivation, education, experience, and other intelligence constructs (e.g., EI). However, based on the literature reviewed above, the portability and application of knowledge and skills from one organization to another may be problematic. As such, determining the knowledge and skills that are portable and applicable to the hiring organization is a challenge for personnel during the hiring process (Cole et al., 2003b; Rynes et al., 1997).

### Summary

Human capital is the most significant source of competitive advantage and financial performance for many organizations in the 21st Century (Barney & Wright, 1998; Cappelli, 2008; Crook et al., 2011; IBM, 2008; O’Leonard, 2009; Teng, 2007). Employers use a variety of criteria and methods to hire applicants who possess the human capital assets (i.e., KSAOs) to perform well in the job and contribute to the organization (Gatewood et al., 2008; Roe, 2005; Schmitt et al., 2003; Viswesvaran & Ones, 2010). While most hiring criteria assume that the KSOAs of applicants are portable from one organization to another, the portability and application of previously-obtained knowledge and skills is not a straightforward process. Specific, relational, industry, and strategic

forms of human capital may not be transferrable or relevant in a new organization (Beechler & Woodward, 2009; Ericksen, 2012; Groysberg et al., 2006; Groysberg et al., 2008a). As such, hiring personnel face dilemmas in assessing the value of applicants' human capital assets, particularly when they possess significant previous work experience (Rynes et al., 1997, Thoms et al., 1999; Tsai et al., 2011; Wilk & Cappelli, 2003).

## CHAPTER III - RESEARCH DESIGN AND METHODOLOGY

The acquisition, development, and retention of managerial talent in organizations are key contributors to organizational success (Amabile & Kramer, 2011; Beck & Harter, 2014; Buckingham & Coffman, 1999). However, little is known about the selection processes used by employers when hiring managers, particularly the use of resume screening and related use of ATS to reduce the size of the applicant pool (Cole et al., 2004; Rynes et al. 1997; Tsai et al., 2011). This phenomenological study sought to understand how employers use resume screening during the hiring process for managerial jobs in the banking and financial services sector. This chapter outlines the research approach and the specific phenomenological methodology used including the role of the researcher. Subsequent sections include the processes and procedures that were used to select study participants, collect and manage data, maintain confidentiality, analyze data, and ensure the quality of the study. This chapter also includes the limitations and delimitations of the study. This chapter concludes with information on the quality of the study results.

### Research Questions

The main question of this study was “What process is used by Human Resources personnel in screening the resumes of applicants for managerial positions?” Five secondary research questions were developed for additional inquiry:

1. How does resume screening fit within the overall hiring process for managerial applicants?
2. How are applicant tracking or e-recruiting systems utilized during the resume screening process for applicants of managerial jobs?

3. What are the criteria used by Human Resources personnel when screening the resumes of managerial applicants?
4. Which criteria are most important to Human Resources personnel in screening the resumes of managerial applicants?
5. What are the sources of the criteria utilized by Human Resources personnel in screening the resumes of managerial applicants?

### Qualitative Research Approach and Research Method

A qualitative research approach permits the researcher to gain a rich understanding of the phenomenon under study (Creswell, 2013; Moustakas, 1994; Stake, 2010). Creswell (2013) states that a qualitative approach is particularly well-suited to the study of a phenomenon “when partial or inadequate theories exist for certain populations and samples or existing theories do not adequately capture the complexity of the problem we are examining” (p. 48). A qualitative approach to this study appeared appropriate since there was limited theory or empirical evidence on the resume screening process utilized by employers when hiring managers, particularly when information technology systems are integrated into the process (Cole et al., 2004; Russell, 2007; Rynes et al., 1997; Thoms et al., 1999; Tsai et al., 2011).

Within the qualitative research domain, a number of approaches and methods for conducting research exist including narrative, phenomenological, grounded theory, ethnographic, case study, and action research approaches (Creswell, 2013; Maxwell, 2013; Stake, 2010). Although there is no standard process for designing a qualitative study, Maxwell (2013) encourages researchers to select approaches and methods based on the goals, conceptual framework, and research questions of the study in order to

achieve a coherent research design. Given that the purpose and research questions focused on describing the resume screening process used to evaluate managerial job applicants, the researcher sought a method that could be used to develop knowledge of the phenomenon based on its use by HR personnel across several organizations. The phenomenological approach is focused on developing an understanding of the collective *essence* or invariant structure of a phenomenon based on the shared experiences of several individuals (Creswell, 2013; Moustakas, 1994). The characteristics of the phenomenological method were deemed congruent with the purpose and research questions of this study.

### Phenomenology

Phenomenology has been described as a philosophy, a paradigm, and a qualitative research method (Ehrich, 1999; Patton, 2002). The complexity of the concept of phenomenology is due, in part, to the fact that it originated in the philosophical writings of Husserl (1931) as part of the European philosophical tradition (Ehrich, 1999, 2005; Giorgi, 2010, 2012). Subsequently, phenomenological philosophy has been refined and expanded primarily by Merleau-Ponty, Heidegger, and Gadamer (Giorgi, 2010, 2012; Smith, Flowers, & Larkin, 2009). In addition, other philosophical writings in hermeneutics<sup>14</sup> have been adopted as sources of support for specific approaches or methods in phenomenological research (Ehrich, 1999, 2005; Smith et al., 2009). From these philosophical writings, three dominant phenomenological research methods have emerged: (a) descriptive phenomenology (Giorgi, 1985a, 1985b, 2009), (b) hermeneutical

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<sup>14</sup> Hermeneutics is “the study of understanding, especially the task of understanding texts” (Palmer, 1969, p.8).

phenomenology (van Manen, 1984, 1990), and (c) interpretative phenomenological analysis (IPA; Smith et al., 2009). These methods were developed under different philosophical positions that are sometimes opposed to each other. For example, hermeneutical phenomenology and IPA make use of the interpretative view from Heidegger (Smith, et al., 2009; van Manen, 2007); however, interpretation based on the presuppositions and experience of the researcher is soundly rejected in descriptive phenomenology (Giorgi, 2009, 2010, 2012). Consequently, the procedures and techniques of one phenomenological method should not be mixed or interchanged with those of another method (Giorgi, 2010). Giorgi (2010) states, “methodical steps are not transposable if the logic behind them differs” (p. 18).

#### *Specific Method Selection*

The descriptive phenomenological method associated with the Duquesne School, as described in the publications of Amedeo Giorgi, was selected by the researcher for this study (Giorgi, 1985a, 1985b, 1985c, 1997, 2009, 2012). The rigor and specific parameters of the method are well-established in numerous publications by Giorgi (1985a, 1985b, 1985c, 1997, 2009, 2012). These publications establish the philosophical foundations of the method and its distinctions from other methods, robust and detailed procedures and techniques for data analysis, and fidelity to the scientific method and the potential to replicate study findings. In contrast with other methods, descriptive phenomenology avoids *interpretation* of the study participants’ experiences (Giorgi, 1985a, 1985b, 2009) and remains faithful to the epoché<sup>15</sup> as articulated by Husserl

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<sup>15</sup> Epoché is defined as a researcher engaging in “disciplined and systematic efforts to set aside prejudgments regarding the phenomenon being investigated in order to launch the study as far as possible

(1931). While this method has not been used widely in organizational settings (Anosike et al., 2012; Gill, 2014), several researchers have advocated for its use in HRD, OD, and management research (Anosike et al., 2012; Ehrich, 2005; Gibson & Hanes, 2003).

### *Descriptive Phenomenology*

Giorgi (1985a, 1997, 2009) describes descriptive phenomenology as the rigorous and unbiased<sup>16</sup> study of the lived experiences of others. The purpose of this method is to explicate the collective essence of the phenomenon based on the experiences of study participants *without interpretation* that may introduce researcher biases (Giorgi, 1985a, 1997, 2009). Giorgi (2009) articulates the sustained descriptive focus of the method as:

a descriptive analysis attempts to understand the meaning of the description based solely upon what is presented in the data...The descriptive researcher obviously sees the same ambiguities that an interpretive analyst would see but is not motivated to clarify them by bringing in nongiven or speculative factors. (p. 127)

In addition to its intense focus on description, the method has three other aspects that distinguish it from other qualitative and phenomenological research methods. These three features are outlined below.

*Reduction.* Phenomenological reduction is a technique, originally described by Husserl (1962/1977), that focuses on improving the precision of research findings (Giorgi, 1997). Reduction is described as moving out of the natural attitude of everyday life in which most things are taken for granted or at face value (Giorgi, 1997, 2009). A

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free of preconceptions, beliefs, and knowledge of the phenomenon from prior experience and professional studies” (Moustakas, 1994, p. 22).

<sup>16</sup> In this context, unbiased means that the research is not contaminated by the presuppositions, knowledge, or motives of the researcher (Giorgi, 1985a, 1985b, 2009).



researcher departs from the natural attitude through the bracketing process wherein past knowledge and presuppositions are bracketed out of the researcher's consciousness<sup>17</sup>. This shift in consciousness facilitates the researcher's focus on the experiences described by study participants in a fresh and rigorous manner (Giorgi, 1997).

The phenomenological reduction also requires that the researcher withhold "the positing of the existence of reality of the object or state of affairs that he or she is beholding" (Giorgi, 2006, p. 355). This withholding allows the researcher to observe objects or events based on the descriptions of the lived experiences of participants without assuming that they are *real* or actually occurred in the manner described (Giorgi, 1985b, 2006). Fundamentally, this principle instructs the researcher to focus on the *phenomenon* as presented and not on ontological claims. The reduction is integral to the process of analyzing the descriptions of the experiences of the study participants (i.e., transcripts; Giorgi, 1985a, Ehrlich, 1999). Giorgi (1997) asserts that within this phenomenological attitude, the researcher is able to describe things (e.g., experiences) precisely and without bias.

*Search for Essences.* The descriptive phenomenological method is directed toward using descriptions of lived experiences from participants to arrive at a description of the essence of the phenomenon or "the most invariant meaning for a context" (Giorgi, 1997, p. 242). The essence of the phenomenon is achieved through the data analysis protocols of the method (Giorgi, 1997, 2009). One technique that assists the researcher in moving toward the essence, or a common invariant structure of the phenomenon, is free imaginative variation. Free imaginative variation is the process of the researcher

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<sup>17</sup> Consciousness is defined as simply being aware of the external world (Sutherland, 1995).

mentally removing an element or aspect of the phenomenon to determine its essentialness. This process allows the researcher to think through a number of what if scenarios in order to arrive at the essence of the phenomenon based on the lived experiences of the study participants (Giorgi, 1997, 2009). Additional information on this process is provided in the data analysis section of this chapter.

*Intentionality.* The concept of intentionality is important in descriptive phenomenology because it describes the focus on the researcher (i.e., the focus of her consciousness) within the research (Gibson & Hanes, 2003; Giorgi, 2009). From the philosophical perspective of Husserl, intentionality is the premise that an act of consciousness is always directed outward: toward a real object or unreal object (e.g., a thought, mood, or emotion). Within descriptive phenomenology, the concept of intentionality differentiates the method's underlying philosophy from the Cartesian understanding of the subject-object relationship (Giorgi, 1997). From a Cartesian perspective, the subject (e.g., the researcher) and the object (e.g., a plant, atom, or animal) are separate entities: a significant assumption in logical-empirical research. In contrast, phenomenology suggests that the subject and object coexist in the researcher's consciousness (Giorgi, 1997). As such, while the experiences of study participants were real to them, they only exist in the consciousness of the researcher. This concept implies that the relationship to the object (i.e., the participant or his/her experience) is subjective in nature. Consequently, the biases of the researcher must be bracketed to allow objects (e.g., experiences) to be observed "precisely as they are presented" (Giorgi, 1997, p. 237).

Giorgi (1997) explains that a researcher must have an understanding of the concepts of phenomenon, consciousness, reduction, bracketing, intentionality, and essences in order to perform descriptive phenomenological research. While these concepts may appear abstract or irrelevant to a lay reader or quantitative researcher, they have impacts on the descriptive phenomenological method. Collectively, these concepts describe the manner in which the researcher approaches and performs descriptive phenomenological research within implicit ontological (i.e., the nature of reality), epistemological (i.e., how knowledge is acquired), axiological (i.e., the *position* of the researcher) and methodological assumptions (Creswell, 2013; Giorgi, 1997, 2009).

#### Role of the Researcher

Within the qualitative research tradition, the researcher is central to both the generation and analysis of study data (Creswell, 2013). Some scholars posit that the researcher is “the primary instrument or medium through which the research is conducted” (Lofland, Snow, Anderson, & Lofland, 2006, p. 3). As the instrument, the perspectives and biases of the researcher based on prior knowledge and experiences may influence both the collection and analysis of study data (Giorgi, 1985a, 1985b, 2009; Moustakas, 1994). Moustakas (1994) encourages qualitative researchers to engage in the *epoché* process in which they recognize and set aside their prejudgments, biases, and preconceived ideas related to the study. Thus, the researcher approaches the study “completely open, receptive, and naïve in listening to and hearing research participants describe their experience of the phenomenon being investigated” (Moustakas, 1994, p. 22).

Descriptive phenomenology instructs researchers to bracket their past knowledge and presuppositions during the data analysis phase of the research (Aanstoos, 1985; Giorgi, 2009). The bracketing process is similar to the epoché and is intended to break from the natural attitude in which “we are constantly evaluating our present experiences in terms of our past experiences” (Giorgi, 2009, p. 91). Thus, the process is intended to ensure that the researcher assumes a perspective that focuses exclusively on the present experience.

### *Researcher Actions*

As the researcher, it was important for me to assess my position in relation to the purpose and objectives of this study. In order to be transparent with the readers of this study, certain disclosures seem appropriate. I am an experienced consulting professional who has been involved in the hiring process for many positions over the course of my career. My career has included entry-level, managerial, and executive positions in the commercial aviation, telecommunications, consulting, not-for-profit, and software sectors in the U.S. During my career, I have conducted hundreds of interviews with client personnel to collect data on their organizations, processes, and systems. These experiences have created perspectives and presuppositions on the resume screening process and data collection procedures (e.g., interviews). Having reflected on these experiences and my related presuppositions, I attempted to engage in my role as a researcher whose purpose was to understand and interpret the experiences of *others* in the course of this study (Creswell, 2013).

In an effort to recognize and control the potential influences of my own professional and personal experiences in the planning and execution of this study, I

engaged in an ongoing reflective journaling exercise. As Ortlipp (2008) notes, reflective journaling can be a valuable tool in gaining awareness of one's conscious and unconscious thoughts, feelings, and desires. Merriam and Tisdell (2016) note attendance to reflexivity is an effective strategy in improving a study's internal validity. This process was a means through which I periodically revisited my own potential biases and presuppositions throughout the research process.

### Study Participant Selection

Over 1 million individuals in U.S.-based organizations routinely screen applicant resumes as part of hiring processes. Based on an analysis of profiles on the LinkedIn professional networking platform, Cathey (2009) estimates that 1 million users were recruiters or similar professionals within their organizations. Further, approximately 18 million managerial personnel exist in the U.S. workforce (U.S. Bureau of Labor Statistics, 2017). A significant percentage of these individuals are likely to be engaged in resume screening processes since hiring is among the key responsibilities of both recruiters and managers.

The banking and financial services sector is composed of approximately 16 million employees in the United States (U.S. Bureau of Labor Statistics, 2015). EEOC statistics indicate that approximately 18% of employees within the banking and financial services industry are managers (U.S. Equal Employment Opportunity Commission, 2013). As such, the industry accounts for approximately 2.9 million managerial personnel in the United States.

The number of study participants in phenomenological studies varies widely (Creswell, 2013; Polkinghorne, 1989). Polkinghorne (1989) notes that phenomenological

studies have used as few as three participants to as many as 325. His guidance on selecting study subjects is for researchers to utilize a group of study subjects who will generate a full range of variation in the descriptions of the phenomenon under study. He states that the generalization of study findings does not derive from the sample size or characteristics of the study subjects. In contrast, phenomenological study results are generalizable to the extent that the essential structure or invariant meaning of the phenomenon described in the results are “prototypical of those to whom the findings are said to hold” (Polkinghorne, 1989, p. 48).

Twelve HR personnel, in the banking and financial services industry, actively engaged in the resume screening process in their organizations were participants in this study. The sample size of 12 participants is based primarily on the guidance of Creswell (2013) who notes that the sample size for phenomenological studies “may vary in size from 3 to 4 individuals to 10 to 15” (p. 78). Descriptive phenomenological studies often use only three participants.<sup>18</sup> However, Giorgi (1985a) notes that descriptive phenomenological studies containing larger numbers of participants reveal a greater number of variations in the phenomenon under study.

Study participants were selected using two purposive sampling techniques: criterion sampling and snowball sampling. Criterion sampling involves selecting study participants based on a key criterion: individuals who have experienced the phenomenon under study (Creswell, 2013). Criterion sampling is a common participant selection technique for phenomenological research (Creswell, 2013). The key criterion used to

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<sup>18</sup> Studies conducted and overseen (e.g., dissertations) by Giorgi typically utilize a small number of study participants. For example, Applebaum (2009) and Cutler (2014), each used three study participants.

select participants in this study was whether they had recent experience (i.e., within the past year) in screening the resumes of managerial applicants during the hiring process in the banking and financial services sector. Appendix A contains the questions asked of each participant to determine that they met this criterion in a brief telephone call before their acceptance into the study. The combination of criterion and snowball sampling techniques used in this study follows the sequential sampling approach described by Teddlie and Yu (2007). The sequential or blended approach to sampling is commonly used in qualitative research when the issues being examined are complex or information from diverse sources would be beneficial in theory-building or refinement (Teddlie & Yu, 2007).

Snowball sampling was used as the technique for identifying potential study participants. Snowball sampling is defined as “when the researcher accesses informants through contact information that is provided by other informants” (Noy, 2008, p. 330). Although this sampling method is often used to identify study participants from populations that are hard to identify or recruit (e.g., homeless individuals), it may be also used in studies when the researcher may have limited access to the social or professional networks in which members of the study population reside (Noy, 2008). As Atkinson and Flint (2001) note, snowball sampling offers practical advantages when the study is qualitative, explorative, and descriptive. These advantages include cost avoidance, efficiency, and effectiveness in the identification of study participants.

### *Detailed Study Participant Selection Procedures*

Study participants were selected based using the following procedures:

1. The researcher contacted individuals who were in the researcher's professional network through the LinkedIn platform. These professional contacts were accumulated during the past 20 years of the researcher's career. Initial contact was made with members of the researcher's network in the banking and financial services industry.
2. Each contact was asked to identify and facilitate communication with an HR professional who was involved in the hiring process within their organization.
3. During the course of the study, new contacts in the HR domain joined the researcher's network (approximately 50 of this type). These new members of the researcher's network, when part of the banking and financial services industry, were also contacted to identify and facilitate communication with HR professionals who were involved in the hiring process within the new members' organizations.
4. HR professionals were subsequently recruited into the study using the invitation letter in Appendix B.
5. Based on the HR professional's response, an initial telephone call for screening, informed consent, and planning purposes was conducted with the potential participant. One purpose of the screening portion of this call was to ensure that the potential participant met the criteria for inclusion in the study (i.e., experience in screening the resumes of managerial applicants within the



banking and financial services industry). Appendix C contains the script that was used in the calls.

6. At the conclusion of the data collection interviews, participants were asked by the researcher if they knew other HR professionals in the banking and financial services industry who might be willing to participate in the study. If an HR professional provided potential participants, steps 3 and 4 above were repeated with the new contacts.

#### *Study Participant Induction Procedures*

Study participants were inducted into the study utilizing the procedures shown below.

1. Initial contact was made with participant through e-mail using the invitation letter shown in Appendix B.
2. Based on potential participant's response to initial e-mail, an initial call was scheduled with him.
3. The initial call was conducted to review the purpose of the study, to ensure that the potential participant met study inclusion criteria, to discuss informed consent, and to discuss and plan the data collection interview. This call was conducted utilizing the script shown in Appendix C.
4. During the initial call, if the potential participant did not meet the inclusion criteria for the study, the call was concluded and a thank you note was sent to the potential participant. If the potential participant met the study inclusion criteria, the call was continued in order to discuss the informed consent process and schedule the data collection interview.

5. Following the initial call, the researcher sent an e-mail to the potential participant including the informed consent brief and form as shown in Appendix D and Appendix E.
6. Upon receipt of the signed informed consent form, the participant was inducted into the study.

### Data Collection

Data collection for this study included two components: (a) collecting demographic data on study participants, and (b) conducting participant interviews. Demographic data was collected in order to describe the characteristics of study participants. Appendix F contains the demographic data collection instrument.

#### *Interviews*

Interviews with study participants were the method utilized to study the phenomenon of resume screening. Interviews are the most common data collection tool used in phenomenological research (Creswell, 2013) and essential to descriptive phenomenological research (Englander, 2012; Giorgi, 1985a, 2009). Giorgi (2009) states that the researcher should strive to obtain “as complete a description as possible for the experience that a participant has lived through” (p. 122) when conducting a participant interview. Semi-structured interviews with participants were conducted utilizing the interview guide in Appendix G. Each question in the interview guide links to a specific research question as shown in Table 4 below.

Table 4 *Research Questions and Corresponding Interview Questions*

| Research Questions            | Interview Questions              |
|-------------------------------|----------------------------------|
| Main Research Questions       | 1, 1c, 1d, 1e, 1f 2, 6, 6b, 7, 8 |
| Secondary Research Question 1 | 1a, 1b, 3, 5, 7, 8               |
| Secondary Research Question 2 | 1, 4, 5, 7                       |
| Secondary Research Question 3 | 1b, 2, 6b                        |
| Secondary Research Question 4 | 1d, 2, 5, 6b                     |
| Secondary Research Question 5 | 5, 6a, 6b, 7                     |

All participant interviews were recorded (audio only) using the GoToMeeting web-based meeting application. Synchronous online interviews of this type, utilizing web-based meeting applications, have become common in the qualitative research domain (O'Connor, Madge, Shaw, & Wellens, 2008). Each interview was audio recorded using the technology associated with this application; however, recordings of the interviews were only initiated after demographic data from participants was collected. This protocol was used in order to eliminate any personally identifiable information (PII) from the audio recording and manage potential risks associated with participant privacy.

Creswell (2013) encourages qualitative researchers to use new and creative data collection methods to reduce study costs and improve efficiency. However, he notes that online data collection raises new ethical concerns including privacy protection. Privacy concerns was an issue of prime importance to the researcher in this study and were

addressed in the research protocols described in the data management and confidentiality sections of this chapter.

### *Data Collection Procedures*

Demographic and interview study data were collected in the synchronous online interviews discussed above. Interviews were scheduled at the conclusion of the initial calls with each participant. When the interview was conducted, the researcher followed the procedures described below.

1. Researcher initiated the online meeting software at the scheduled time for interview.
2. Researcher greeted the study participant and informed him that the interview would begin with the collection of demographic data.
3. Researcher collected demographic data from participant and recorded it in a spreadsheet created for this purpose. Demographic data was collected using the instrument shown in Appendix F.
4. Researcher informed the participant that the interview portion of the online meeting would begin. The researcher informed the participant that he would use phrasing like “in your company” to avoid including the company name in the interview recording. The researcher encouraged the participant to use the same protocol in her answers.
5. Researcher began the recording of the interview.
6. Researcher confirmed with the participant that she was an HR professional who is involved in the resume screening process for managerial applicants. Further, researcher confirmed that she worked for an organization in the

banking and financial services industry. Finally, the researcher confirmed that she reviewed the informed consent materials that were sent and that she consented to participate in the study.

7. Researcher asked interview questions using the interview guide shown in Appendix G.
8. Researcher ended recording of the interview.
9. Researcher asked the participant if he knew of other individuals in his company or others who might be potential participants for the study. If so, the researcher asked the participant to make an introduction to that individual and e-mail the individual's contact information to him.
10. Researcher informed the participant that the interview transcript would be e-mailed to him after it was transcribed for review and validation.
11. Researcher thanked the participant for his time and assistance and concluded the meeting.

Following the interview, the researcher coordinated the transcribing of the interview recording using a third-party transcription service, rev.com. In order to ensure the accuracy of interview transcription, the interview transcript was e-mailed to the study participant for review and correction using the e-mail shown in Appendix H. The practice of having study participants review and validate their interview transcripts is a common form of member checking in qualitative research (Carlson, 2010). The purpose of this practice is to improve the trustworthiness of the research study (Carlson, 2010; Creswell, 2013).

The researcher requested that the participant review, edit (or clarify), and return the interview transcript within one week. If the participant did not subsequently return the transcript document, the researcher reminded him once and established a final deadline for receipt of the edited transcript. In all cases, participants provided edits to the initial transcripts or responded to the researcher within two weeks after the transcript document was sent for review. Table 5 consolidates all of the activities in the study related to contacts with members of the researcher’s LinkedIn network and participants during the study.

Table 5 *List of Contact Activities*

| Activity   | Audience                     | Appendix Reference |
|--|------------------------------|--------------------|
| Initial contact made via LinkedIn or e-mail to solicit potential study participants from researcher’s LinkedIn network | LinkedIn Network members     | n/a                |
| Initial e-mail communication sent to potential study participant   | Potential Study Participants | Appendix B         |
| Initial call made with potential study participant for screening, informed consent, and planning purposes              | Potential Study Participants | Appendix C         |
| E-mail sent to potential study participant including informed consent brief and form                                   | Potential Study Participants | Appendices D and E |
| Data collection interview conducted (online meeting)   | Study Participants           | Appendices F and G |

Table 5 Continued

|  |                    |            |
|--|--------------------|------------|
| E-mail sent to participant for review/editing of interview transcripts | Study Participants | Appendix H |
| E-mail sent thanking participant for her participation in the study    | Study Participants | n/a        |
| E-mail sent containing Executive Summary of Study                      | Study Participants | n/a        |

#### Data Management

Initial contact with study participants was made through direct e-mail communication or LinkedIn messaging between the researcher and the study participant. Following these introductory messages, a 15-minute telephone call with each participant was conducted to introduce the study, screen potential study participants, and discuss informed consent. At this time, each participant was assigned a participant code that was used for reference purposes in all subsequent data collection. The only key that linked study participants to their names and organizations was on a single sheet of paper maintained at the researcher’s residence. This key was destroyed at the conclusion of the study.

Demographic data from study participants was collected at the beginning of each interview. This data was documented in a spreadsheet by the researcher and organized by participant code. The spreadsheet was maintained on the researcher’s password-protected laptop computer during the study.

Interviews were conducted with study participants using the GoToMeeting web-based meeting application. Following the conclusion of each interview, the audio file of the interview was downloaded by the researcher and stored on a password-protected laptop computer. The files were named based on participant codes, and duplicate copies of these files were also stored on an external hard drive. Following each interview, the audio file was transmitted to a third-party transcription service (rev.com) in order to have the interview transcript prepared. When interview transcripts were returned to the researcher, they were stored on a secure laptop with duplicates on an external hard drive that was stored in a locked filing cabinet at the researcher's residence.

At the conclusion of the study, all e-mail communications with study participants and the transcription service were deleted from the researcher's e-mail account. The supporting documents from the study including interview transcripts, demographic data, and analysis files were saved on an external hard drive. All other documents and files were deleted from the researcher's laptop computer.

#### Confidentiality

Protection of study participants was a primary concern of the researcher in planning and conducting this study. Consistent with the standards established by The University of Southern Mississippi's Institutional Review Board, the researcher designed and implemented procedures to ensure informed consent and to protect the privacy and confidentiality of data associated with study participants. Study participants were informed of the purpose, study benefits and risks, data collection and management procedures, confidentiality, and assurances in a written brief (see Appendix F) before they were admitted to the study. This brief specifically outlined the procedures for



maintaining the privacy of study participants and safeguarding study data. Following review of this brief, each participant was required to sign an *Informed Consent Form* to acknowledge and document their willingness to participate in the study. This form is shown in Appendix G.

Data collection and management procedures were developed to protect the privacy and confidentiality of data associated with study participants. The overriding objective of these procedures was to ensure that PII associated with a participant could not be obtained by a third party if any breaches in the security of study data or documents occurred. As such, efforts were made by the researcher to ensure that the identity and organizations of participants were not included in interview recordings, interview transcripts, or demographic data documents that were created during the study. Finally, all correspondence to/from study participants and the third party transcription service were deleted from the researcher's e-mail account at the conclusion of the study. At the end of the study, the single hardcopy key document linking study participants to their participant codes was destroyed.

In presenting the analysis and results of the study, the researcher ensured that any quotes included in the study from participants were free of organizational context information that might inadvertently be traceable to a specific study participant. For example, if a comment included information that referenced the participant's organization, this information was deleted or altered to provide for anonymity. Consequently, it should be virtually impossible for a participant quote or comment to be attributed to a specific individual.

## Study Schedule

Given the iterative nature of identifying and inducting study participants, several of the research activities of the study were conducted simultaneously. Table 6 depicts the research activities that were executed and their related timing during the study.

Table 6 *Study Schedule*

| Activity   | Schedule     |
|--|--------------|
| 1. Contacted members of researcher's LinkedIn network for referrals                                    | Months 1-22  |
| 2. Sent e-mail communications and performed introductory calls with study participants                 | Months 1-23  |
| 3. Conducted interviews, sent transcripts to participants for review/edits, and sent thank you e-mails | Months 1-24  |
| 4. Conducted data analysis from interview transcripts  | Months 3-28  |
| 5. Conducted final data analysis and develop results   | Months 29-33 |
| 6. Sent Executive Summary to study participants  | Month 34     |

The study was initiated by contacting members of the researcher's LinkedIn network in the banking and finance industry for referrals to HR professionals within their organizations. The contact process was conducted iteratively over a period of 22 months. In addition, communicating with potential study participants, conducting introductory calls, and planning and conducting interviews occurred iteratively over 23 months as

study participants were identified and inducted into the study. In total, the first three activities of the study were completed in 24 months. This timeline was in compliance with the research authority granted by the Institutional Review Board (IRB) of the Southern Mississippi. The original period for data collection with study participants was 12 months; however, an extension was granted that allowed this activity to be extended to 24 months (copies of the IRB's approval letters are contained in Appendix I).

As interviews were completed and transcripts were received, in the third month of the study the researcher began the data analysis activities. The data analysis process was conducted concurrently with other study activities until all interview transcripts were analyzed. This activity was completed by the 28th month of the study. The final analysis of the interview transcripts and development of study results was conducted subsequently and completed by the month 33 of the study. After all core study activities were completed, an executive summary of the results was developed and sent to study participants in month 34 of the study.

### Data Analysis

The analysis of the study data took two forms: (a) developing statistics that describe the participant demographics and (b) conducting the descriptive phenomenological analysis from participant interview transcripts. The procedures for each of these two forms of data analysis are described below.

#### *Participant Demographic Statistics*

Demographic data for study participants was collected at the beginning of each interview. This data was input into a Microsoft Excel spreadsheet throughout the study. Following the completion of all of the participant interviews, descriptive statistics on the

study participants were generated by the researcher. These statistics were subsequently compared to data on the composition of the U.S. HR workforce from the U.S. Bureau of Labor Statistics. Chapter IV includes tables of the descriptive statistics and the related discussion of the demographic characteristics of the study participants.

#### *Descriptive Phenomenological Analysis*

The descriptive phenomenological method provides prescriptive procedures for the analysis of data (Giorgi, 1985a, 1985b, 2009) and the positioning of the researcher. Before initiating data analysis procedures, Giorgi (2009) instructs researchers to break from the *natural attitude* and bracket his previous experience and presuppositions in order to control biases. The researcher should also “be sensitive to the implications of the data for the phenomenon being researched” (Giorgi, 2009, p. 128). These practices are essential for the researcher to read the interview transcript from “within the phenomenological scientific reduction” (Giorgi, 2009, p. 128).

Before the researcher initiated the research protocols for analyzing interview transcripts, he adopted two attitudinal perspectives, consistent with Giorgi’s (2006) guidance, in order to employ the phenomenological reduction as described below.

1. The researcher bracketed his past knowledge and presuppositions in order to control his biases (Giorgi, 2006; Husserl, 1983). Giorgi (2006) explains that bracketing is “not a matter of forgetting the past; bracketing means that we should not let our past knowledge be engaged while we are determining the mode and content of the present experience” (p. 92).
2. The researcher assumed a phenomenological attitude in which he withheld judgment and positing based on the objects (e.g., topics) and situations

described by study participants. This attitudinal shift allowed the researcher to approach the analysis with fidelity to the lived experiences of study participants in their own contexts.

The descriptive phenomenological method generally requires that a full transcript of each participant interview be available for content analysis (Giorgi, 2009). Having received the final interview transcripts from study participants (inclusive of any edits or clarifications), the researcher followed the four steps of data analysis associated with descriptive phenomenology as described by Giorgi (2009). Each step in the analysis process was conducted for each individual transcript as described below.

1. The researcher read the complete interview transcript to gain a “sense of the entire description” (Giorgi, 2009, p. 218). The reading provided the researcher with an overall sense of the participant’s description of the phenomenon and the situations and related context of the participant’s experience.
2. The researcher re-read the interview transcript and marked the text each time a significant shift in meaning was identified in the description of the experience (Giorgi, 2009). This process allowed the researcher to parse the transcript into meaning units<sup>19</sup> that facilitated subsequent analysis. The creation of meaning units was performed in Microsoft Word through the insertion of a “carriage return” into the transcript document each time a change in meaning was

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<sup>19</sup> Wertz (1985) defines a meaning unit as “part of the description whose phrases require each other to stand as a distinguishable moment.” Further, the author notes that this step in descriptive phenomenological research is “largely anticipatory of the coming analysis” (Wertz, 1985) and is simply used as a way of differentiating the parts of the descriptive content for practical analysis purposes (rather than dealing with the entire descriptive content as whole).

identified by the researcher. After meaning units were defined in the transcript document, each meaning unit was cut and pasted from Microsoft Word into Microsoft Excel. Each meaning unit in the transcript document was entered into a separate cell in the resulting Microsoft Excel spreadsheet. This transfer of data facilitated subsequent transcript analysis (e.g., transformations, as described below). Based on Giorgi's (2009) guidance, the researcher did not establish a priori criteria for determining the meaning units and did not attempt to identify their importance or meaning during this step. An example of the development of meaning units from an excerpt of the transcript of study participant 4D is shown in Table 7 below. This transcript excerpt is a response from the participant to the question "How did you learn to screen resumes?"

Table 7 *Meaning Unit Sample*

| Transcript Content   | Meaning Units  | Meaning Unit Reference Nbr |
|--|--|----------------------------|
| <p>Oh, geez. I came out of grad school in '96. My first job was high-volume recruiting for Exxon-Mobil. I don't know. It's just something that you ... It's typically if you're going to grad school for HR, recruiting,</p> | <p>Oh, geez. I came out of grad school in '96. My first job was high-volume recruiting for Exxon-Mobil. I don't know. It's just something that you ... It's typically if you're going to grad school for HR, recruiting,</p> | <p>4D-28</p>               |

Table 7 Continued

|   |  |              |
|---|--|--------------|
| <p>high volume recruiting is a typical first assignment to kind of get you accustomed. It</p>   | <p>high volume recruiting is a typical first assignment to kind of get you accustomed.</p>   |              |
| <p>helps you learn the organization really well. I</p>  | <p>It helps you learn the organization really well.</p>  | <p>4D-29</p> |
| <p>know it's like common sense.</p>   | <p>I know it's like common sense.</p>  | <p>4D-30</p> |
| <p>They have to meet the minimum requirements. You have to have those minimum requirements, to be considered but there are other factors that you may want to consider. For</p> | <p>You have to have those minimum requirements to be considered, but there are other factors that you may want to consider.</p>                  | <p>4D-31</p> |
| <p>example, if they have the licenses. Is that a plus for this specific position? If they're</p>  | <p>For example, if they have the licenses. Is that a plus for this specific position?</p>  | <p>4D-32</p> |
| <p>bilingual, is that a plus? I don't know that I was ever</p>  | <p>If they're bilingual, is that a plus?</p>   | <p>4D-33</p> |
| <p>formally taught how to screen resumes. It was more of I think an on the job thing where you have to learn,</p>   | <p>I don't know that I was ever formally taught how to screen resumes. It was more of, I think, an on the job thing where you have to learn,</p> | <p>4D-34</p> |

Table 7 Continued

|  |  |  |
|--|--|--|
| <p>especially in high volume recruiting. You had to review resumes really quick. You didn't have a whole lot of time to spend. You look for the primary points that you're interested in like big bank names and titles.</p> | <p>especially in high volume recruiting. You had to review resumes really quick. You didn't have a whole lot of time to spend. You look for the primary points that you're interested in like big bank names and titles.</p> |  |
|--|--|--|

3. The researcher returned to the beginning of the transcript and began a process of interrogating and transforming each meaning unit (Giorgi, 2009). The process of interrogation was essentially a search for the implications and insights of each meaning unit as presented by the participant transcript to the researcher. Each meaning unit was also transformed (i.e., rewritten) into expressions that attempted to reveal the explicit meaning of what was described by the study participant. This process was iterative in nature and sometimes involved multiple attempts and transformations over many months to properly ascertain and express the meaning of the participants' descriptions of their experiences (Giorgi, 2009).

In the third step of the phenomenological psychological method, Giorgi (2009) posits that the detection and transformation of each meaning unit is conducted based on the attitude of the researcher. The attitude



essentially conforms to the position from which the researcher is performing the research: as a psychologist, a physicist, a physician, etc. In the context of this study, the researcher assumed the attitude of an organizational development (OD) professional. This attitude, however, did not imply the application of a priori categories or models when performing the data analysis. Rather, it facilitated the search for meaning in participant experiences by the researcher (Giorgi, 2009).

The researcher did not rely on theoretical models, past experience, or presuppositions during the transformation process. Such interpretive attempts would violate one of the core tenets of the method: fidelity to the participants' descriptions of the phenomenon (Giorgi, 2009). In contrast, the researcher transformed the descriptions of the study participants to increasingly general descriptions of the phenomenon under study, the resume screening process and its related activities. This transformation to a more general state allowed the researcher to subsequently synthesize the results from all study participants (Giorgi, 2009).

Based on the researcher's experience in conducting the meaning unit transformations, the process could be described as a series of questions that were used to ensure quality as meaning units were written, revised and reevaluated throughout the data analysis process. These questions included the following:

- a. What is being described by the participant?

- b. How do I create a precise, but more generalized version, of what is being described by the participant?
- c. Is the transformed meaning unit complete? Does it contain all the essential information described by the participant?
- d. Is there context within the interview transcript that may inform how I transform the meaning unit?
- e. Is there content within the interview transcript that contradicts, conflicts or conforms to what is described in the meaning unit?
- f. Has the meaning unit been delineated correctly? Should content from above or below it be joined to it to provide a more complete unit?
- g. From an OD perspective, what constructs in the participant's narrative are being described (e.g., P-O fit)?
- h. What is the essence of the experience being described by the participant?

These questions were revisited continuously during the study period as meaning units were transformed initially, revisited later (typically a month or two later), and during the synthesis process (as described below). It was a process that went forward and backward in transforming the meaning units, returning to the participants' original transcript, and interrogating the quality of the output.

An example of a meaning unit transformation is shown in Table 8. This example was an instance in which multiple transformations of meaning units were performed. Further, this example illustrates how meaning units were sometimes combined during the transformation process based on review

and interrogation by the researcher (the meaning units that were ultimately combined are shown in italics in the first two columns). This example is a response from the participant to the question “How did you learn to screen resumes?” (also shown in Table 7 above).

Table 8 *Meaning Unit Transformation Example*

| Meaning Units   | First Transformation  | Second Transformation  |
|---|---|--|
| Oh, geez. I came out of grad school in '96. My first job was high-volume recruiting for Exxon-Mobil. I don't know. It's just something that you ... It's typically if you're going to grad school for HR, recruiting, high volume recruiting is a typical first assignment to kind of get you accustomed. | 4D states that she learned resume screening <del>as part of</del> at her first job following graduate school (over 20 years ago). | 4D states that she learned resume screening at her first job following graduate school (over 20 years ago). The job was a high-volume recruiting position. |
| It helps you learn the organization really well.  | 4D states that the process of learning  | n/a  |

Table 8 Continued

|   |  |   |
|---|--|---|
|   | resume screening helps HR personnel in learning about the organization.  |   |
| I know it's like common sense.  | 4D states that resume screening is “common sense”.   | n/a   |
| <i>You have to have those minimum requirements to be considered, but there are other factors that you may want to consider.</i> | <i>4D states that her primary focus in resume screening is on minimum qualification but that there are other factors that may be considered.</i> | 4D states that her primary focus in resume screening is on minimum qualifications (applicants may be eliminated when they do                    |
| <i>For example, if they have the licenses. Is that a plus for this specific position?</i>                                       | <i>4D states that licensing may be a criterion used in resume screening.</i>   | not meet minimum qualifications for the position). However,   |
| <i>If they're bilingual, is that a plus?</i>  | <i>4D states that being bilingual may be a criterion used in resume screening.</i>   | other applicant attributes may be considered (that result in <i>not</i> eliminating an applicant who does not meet the minimum qualifications). |

Table 8 Continued

|  |   |  |
|--|---|--|
|  |   | <p>Examples include licenses held and bilingual capabilities. 4D refers to other capabilities as pluses.</p> |
| <p>I don't know that I was ever formally taught how to screen resumes. It was more of, I think, an on the job thing where you have to learn, especially in high volume recruiting. You had to review resumes really quick. You didn't have a whole lot of time to spend. You look for the primary points that you're interested in like big bank names and titles.</p> | <p>4D states that she was not formally trained to perform resume screening.</p> | <p>n/a</p>   |

A complete example of a transformed interview transcript is shown in Appendix J.

4. Following the transformation process, the researcher began the process of synthesizing the transformed meaning units into a consistent description of the structure of the phenomena under study, the resume screening process and related processes and attributes (Giorgi, 1985b). This synthesis process was essentially a *search for essences* in the transformed meaning units that described a process or occurrence across study participants. For example, in analyzing the data related to the primary research question (What process is used by HR personnel in screening the resumes of applicants for managerial positions?), the researcher reviewed all the relevant transformed meaning units across participants to develop an initial structure of this phenomenon.

In order to facilitate the synthesis process, the transformed meaning units for each participant were combined into a single Microsoft Excel spreadsheet. Once the spreadsheet was created, the research question related to each portion of the transformed meaning units were inserted in the left column (to create a link between the research question and relevant content). This organization allowed the researcher to review and analyze the descriptive content from the study participants side by side in the context of each research question. Given the organization of the interviews and sequencing of questions, the transformed meaning units were well-aligned across the participants. In some cases, however, descriptive content was re-positioned

within the spreadsheet to align with the content from other participants on a particular question or topic.

While the data analysis process described above was deeply connected to the participants' descriptions of lived experiences of the phenomenon, the researcher engaged in *free imaginative variation* during the synthesis step (Giorgi, 2009). Free imaginative variation is an analysis technique wherein the researcher imagines the descriptive data to be different than what it is in order to draw out the essential elements of the phenomenon. This process amounts to a series of *what if* questions posited by the researcher to reveal higher-level dimensions of the phenomenon that retain the same meaning but are “not embedded within the same contingent facts” (Giorgi, 2009, p. 132). In summary, this technique allows the researcher to interrogate and test the various implications associated with participants' experiences in order to arrive at a general structure of the phenomenon (Giorgi, 1985b, 2009).

As the researcher synthesized the transformed meaning units across study participants, he developed a series of written statements or short paragraphs related to each research question based on the underlying data under analysis. For example, when reviewing and synthesizing the descriptive content on the criteria used by HR personnel in screening managerial resumes, the researcher created the following statement based on the cumulative transformed meaning units across study participants:

Participants utilize the following criteria when screening managerial resumes: (1) previous managerial work experience, (2) previous

industry work experience, (3) previous functional work experience, (4) job stability, (5) education, (6) licensing, (7) community involvement, and (8) resume organization and aesthetics. Not all participants use the same criteria. The most frequently used criteria are 1, 2, 3, and 8. These statements were subsequently reviewed, interrogated and edited as a means through which to establish the study results. In many cases, additional details or descriptive features were added to the statements to enrich them and to provide context as deemed necessary.

The statements generated in the final step of the analysis process were the source of the study results documented in Chapter IV.

#### Limitations

Given the central role of the researcher in qualitative studies, there is a risk that a researcher's biases, presuppositions, and previous experiences may contaminate the study findings (Giorgi, 2009; Moustakas, 1994). However, the descriptive phenomenological method adopted in this study provided protocols to control the personal biases of the researcher. These protocols included adoption of the phenomenological perspective, use of bracketing, withholding of existential affirmation, and fidelity to the prescribed steps in data analysis (Giorgi, 1985a, 1985b, 2009). These protocols were followed by the researcher. Further, reflective journaling was used throughout the planning and execution of the study to moderate the presence of researcher bias in the planning, data collection, data analysis, and reporting phases of the study (Creswell, 2013).

The results of the study may not be generalizable to the larger population of hiring personnel due to the small number of participants in this study and the non-randomized



nature of the participant sample. The issue of the generalizability of qualitative research results has been widely debated within the field of research including whether such a standard is appropriate for qualitative inquiry (Chenail, 2010). However, Sandelowski (1997) notes that the perceived lack of generalizability is the most important reason that qualitative research results are not taken seriously. In this study, the researcher selected study participants purposively, based on their experience with resume screening for managerial applicants. In addition, the participants were selected from a number of organizational settings in the banking and financial services industry. While such participant selection techniques do not mirror quantitative sampling techniques, one can reasonably make an argument that the study results may be transferrable to other organizational environments (Morse, 1999).

#### Delimitations

The study focuses only on the resume screening process used by employers when hiring managers in the banking and financial services industry. While this group of managerial employees is large, approximately 18 million workers in the U.S. in 2017 (U.S. Bureau of Labor Statistics, 2017), it also diminishes the generalizability of the results to all job applicants. However, there were good reasons to narrow the study to this population. There is evidence that differences exist in the criteria utilized in the resume screening process based on job family and job requirements (Brown & Campion, 1994; Rynes et al., 1997). Further, resume screening is not a universal practice and may not be used when hiring for positions that do not require a college degree or significant levels of previous work experience. As such, the exclusive focus on managerial positions

was deemed reasonable since individuals applying for these positions commonly use resumes as an integral part of the application process (Cascio & Fogli, 2004).

The exclusive focus on the banking and financial services industry may also limit the generalizability of the study results. However, as Polkinghorne (1989) notes, the generalization of phenomenological study findings does not derive from the sample size or characteristics of the study subjects. Phenomenological study results are generalizable to the extent that the essential structure or invariant meaning of the phenomenon described in the results are “prototypical of those to whom the findings are said to hold” (Polkinghorne, 1989, p. 48). In the context of this study, the generalizability of study findings should be judged by the extent to which they are consistent with the experiences of HR personnel in the banking and financial services industry.

#### Quality of Study

In the logical-empirical scientific tradition, the reliability and validity of results are primary criteria utilized to examine the quality of the research (Creswell, 2013; Giorgi, 1988; Soderhamn, 2001). A wide variety of perspectives, constructs, strategies, and techniques have been developed in the qualitative research realm to evaluate and validate qualitative research (Creswell, 2013). For a phenomenological study, Creswell (2013) establishes five standards that may be used to assess the quality of the study: (a) the researcher understands the philosophical tenets of phenomenology, (b) the researcher articulates the phenomenon for study clearly, (c) the researcher uses data analysis procedures from the phenomenology literature, (d) the researcher conveys the “overall essence of the experience of the participants” (p. 260) and related contextual information, and (e) the researcher is reflective throughout the study.

Giorgi (1988) has addressed the issue of validity and reliability in phenomenological research. He concludes that phenomenological studies are more appropriately assessed based on *defensible knowledge claims*<sup>20</sup> as described in Salner (1986). Based on a review of Husserl's philosophy of phenomenology, Giorgi (1988) posits that the data analysis procedures of the descriptive phenomenological method create defensible knowledge claims if the procedures are properly implemented. He specifically points to the importance of the reduction and imaginative variation for researchers to arrive at accurate descriptions of phenomena (Giorgi, 1988). In summary, defensible knowledge claims are achieved through the researcher's faithfulness to the descriptive phenomenological method.

In order to ensure the quality of the study and to establish defensible knowledge claims, the researcher took the following actions in the present study:

1. Developed an understanding of the underlying philosophical principles of phenomenology as summarized earlier in this chapter.
2. Identified a phenomenon for study based on personal interest and a review of the related research literature.
3. Learned and followed the data analysis procedures established by Giorgi (1985a, 1985b, 2009, 2010, 2012) for descriptive phenomenology without deviation or adoption of procedures from other methods.
4. Developed an overall essence of the phenomenon based on the descriptions of participant experiences with contextual information in the study results.

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<sup>20</sup> A defensible knowledge claim is a proposed method for examining the validity of qualitative research results based on an examination of the sources of *invalidity*. The more attempts that are made to invalidate (or falsify) the results, the more trustworthy the results are deemed (Kvale, 1994).

5. Engaged in a process of reflective journaling during the planning and execution of the study.

### Summary

This study utilized the descriptive phenomenological method as described in the publications of Giorgi (1985a, 1985b, 1997, 2009, 2010, 2012). This method was selected since descriptive phenomenology permits the researcher to gain an understanding of the lived experiences of others in a rigorous and methodical manner. The choice of method was informed by the purpose and conceptual model of the study. Further, the researcher established specific criteria used in the selection of a phenomenological method. Once the descriptive phenomenological method was chosen, the researcher positioned himself in the research process with fidelity to the method. This positioning involved understanding the method, its philosophical foundations, procedures, and techniques in detail and implementing them appropriately. The rigor with which the method was followed enhances the quality of the research results as described in the next chapter.

## CHAPTER IV - RESULTS

The majority of the existing empirical research related to hiring processes and underlying activities focuses on the hiring of recent college graduates (Cole et al., 2004; Rynes et al., 1997; Tsai et al., 2011). The lack of research on the hiring processes and underlying activities for applicants who possess significant previous work presents a gap in the research literature (Rynes et al., 1997, Thoms et al., 1999; Tsai et al., 2011; Wilk & Cappelli, 2003). Based on the researcher's review of the published literature (Chapter II), this gap has not been addressed by research studies in the intervening period. The present study seeks to address this gap through the development of inductive descriptions of the processes, criteria, sources of criteria, and importances of criteria used by employers when screening the resumes of applicants for managerial positions. This study utilized the descriptive phenomenological method, a qualitative research methodology, to develop a formative representation of the resume screening process utilized when hiring managerial positions in the banking and financial services industry. Additional context for the resume screening process within organizations is provided through descriptions of other activities within the hiring process.

### Descriptive Statistics

The 12 study participants represent a variety of organizations in the banking and financial services industry in the United States. All study participants represent first-line resume screeners within their organizations with titles including Recruiter, HR Generalist, HR Specialist, and HR Director. The participants' organizations ranged from a regional credit union to large nationwide banking institutions. Table 9 below contains the basic demographic data on the 12 study participants. As the table demonstrates, the

majority of the study participants were female (83%) and half of the participants were Caucasian. Further, half of the participants were in the age range of 36 to 45 years with the remaining participants equally distributed in the three other age cohorts.

Table 9 *Participant Demographics*

| Characteristics       | <i>n</i> | Percent |
|-----------------------|----------|---------|
| <b>Gender</b>         |          |         |
| Male                  | 2        | 16.7    |
| Female                | 10       | 83.3    |
| <b>Age</b>            |          |         |
| 25 – 35               | 2        | 16.7    |
| 36 – 45               | 6        | 50.0    |
| 46 – 55               | 2        | 16.7    |
| 56 – 65               | 2        | 16.7    |
| <b>Race/Ethnicity</b> |          |         |
| Caucasian             | 6        | 50      |
| African-American      | 3        | 25      |
| Hispanic              | 3        | 25      |

The study participants exhibit similar demographic characteristics when compared to the U.S. human resources workforce. The U.S. Bureau of Labor Statistics reports that HR managers in the U.S. are 71% female (U.S. Bureau of Labor Statistics, 2017). Further, the race/ethnicity of the workforce is: (a) 82% Caucasian, (b) 12% African-American, and (c) 8% Hispanic or Latino. The variance between the study participants and the composition of HR managers in the United States may be explained as follows:

1. The process of recruiting participants into the study was not randomized.

Rather, the recruiting process was linked to the researcher’s professional

network (through LinkedIn). The contacts in the researcher’s network are distributed dominantly in the Southern U.S. with a high concentration in the State of Texas.

2. The State of Texas has a population with a higher concentration of Hispanics than the United States overall. The U.S. population is 18% Hispanic; whereas the Texas population is 39% Hispanic (U.S. Census Bureau, 2017).

The researcher also collected data on the study participants’ employment characteristics. As Table 10 shows, study participants were generally experienced members of their work organizations with an average of eight years of organizational tenure.

Table 10 *Job Tenure and Organizational Tenure of Study Participants and Number of Employees of Study Participant Organizations*

|                                     | <i>n</i> | <i>M</i> | <i>SD</i> | Min | Max     |
|-------------------------------------|----------|----------|-----------|-----|---------|
| Job Tenure                          | 12       | 6        | 3.77      | 1.5 | 12      |
| Organizational Tenure (Years)       | 12       | 8        | 4.35      | 1.5 | 14      |
| Number of Employees in Organization | 12       | 71,229   | 105,032   | 250 | 269,000 |

## Results

The study results presented in this chapter are a synthesis of the transformed descriptive content provided by the 12 study participants during interviews. The content in the subsections below, organized by research question, are the direct results of the interview transcript transformation and content synthesis processes conducted by the

researcher as described in Chapter III. While there was a high level of consistency among study participants in the interview content, in some cases variations of methods or processes utilized by study participants emerged. These variations are discussed within the context of each research question below.

The content below includes direct quotations from study participants when such content was deemed valuable by the researcher in providing supporting evidence for the results or interesting context about a phenomenon (e.g., when a participant described how she eliminates an applicant from the hiring pool). In some areas, the researcher did not include interview excerpts since they were deemed to be of little value in explicating a process or phenomenon (e.g., the activities associated with an organization's hiring process). In either case, the results presented below are entirely based on the content provided by study participants in interviews. The statements in each subsection represent the "essence" of the relevant transformed interview content for the research question across the study participants. Finally, the results were achieved based on adherence to the analysis protocols of the descriptive phenomenological method as articulated by Giorgi (1985a, 1985b, 2009).

#### *Resume Screening Process*

Main research question: What process is used by HR personnel in screening the resumes of applicants for managerial positions?

The resume screening process is composed of three sequential activities embedded in the overall hiring process. Given the timing and independence from other hiring activities, the resume screening activities are actually a sub-process within the overall hiring process. The first activity in the resume screening sub-process is the



collection of resumes and applications for screening. For all study participants, an applicant tracking system (ATS) or Human Resources Information System (HRIS) was used within their organizations to receive resumes and applications. As applicants submit their resumes and applications, these systems send notifications to HR personnel. HR professionals then log into the system and retrieve applicant resumes and applications. HR professionals consistently begin the process of screening resumes and reviewing applicants as soon as they are received. As a result, managerial applicants and their relative rankings within the applicant pool may change over the duration of the posting period: applicants are screened out, and new applicants enter the pool.

The second activity in the resume screening sub-process is the screening of applicant resumes and related applications. This activity involves HR professionals reviewing applicant resumes and applications and determining the extent to which applicants possess the qualifications for the position. The HR professional's conception of the purpose of the resume screening activity determines her approach to performing this activity. Based on the participants' descriptions of this activity, two distinct paradigms, minimum qualifications review and comprehensive review, for screening resumes emerged among participants and are described below.

*Minimum Qualifications Review.* Under this paradigm, the HR professional believes that the purpose of the resume screening activity is to eliminate applicants who do not possess the minimum qualifications for the position. As such, the HR professional seeks to determine if the applicant satisfies the minimum qualifications of the position and reviews relevant sections of the resume to make this determination including previous work experience and education. The HR professional makes no other

attributions about the overall quality of the applicant for the position. A participant described this approach as follows:

Once a candidate applies to our recruiting system then we go in, of course, and look at their experience level, which normally for those types of positions, business banking especially, we pretty much know the experience level of the person. So we review their resume just to make sure they met the minimum qualifications for the position. If they meet the minimum qualifications for the position, then we bring them in to have that meeting with the hiring manager.

*Comprehensive Review.* In this paradigm, the HR professional believes that the purpose of the resume screening activity is to fully assess the quality of applicants based on comprehensively reviewing all content within their resumes. The HR professional reviews all resume content sections including objective, previous work experience, education, certifications and licenses, languages spoken, and community involvement. The HR professional may make attributions based on any content contained on the resume including the organization and aesthetics of the resume presentation. A participant explained this broader screening of resumes as follows:

When you're reviewing resumes for a Branch Manager candidate, the first thing that I'm going to look for is their sales and management experience. When I say sales, I mean business to business sales and not necessarily retail sales. Any applicants that do not possess that type of skill, they're disqualified. For the applicants that actually have that experience, then the second experience that I'm going to look for is banking. They'll have the business to business sales. Let's say I have two applicants; one has business to business sales and banking, the

other has business to business sales and, let's say, insurance. Well naturally I'm going to lean towards the one that has business to business sales and the banking, and the insurance one is disqualified. The banking [one] would be more qualified. That's another step. A third step, let's say both the applicants have business to business sales and they have banking, then I'm looking at years of service. How long they've been in their current position as a manager? How long they've worked in a bank? How long they've worked in sales? A second qualifier would be the education background, possessing a bachelor's degree or master's degree. Another qualifier if they've attended any school of banking and got a specialized certification in the field of banking.

Another qualifier would be if they possess a license: because [for] various financial products you have to have a license. For instance, insurance, there is an annuities license. So if this candidate possesses a license that would be another qualifier. Because we have a sales culture, another qualifier would be their community involvement because that would tell me that this person could network and [if] they have a database of individuals that they network with. We would look for all that information on the resume, and candidates that do not possess that information would be disqualified.

In this paradigm of resume screening, participants reported that they may also examine the organization and aesthetics of the resume presentation. One participant described her approach as follows:

Punctuation, misspelled words, the formatting, if there's two different [types of] formatting on the resume. Yeah, there are a number of things that we look

at...We would eliminate the candidate. We felt as though the candidate did not take time or effort to present a well-written resume. It shows a lack of attention to details.

The resume screening activity may also be impacted by information contained in applications (that are contained in the ATS or HRIS) if they are part of the organization's hiring process. When robust application information exists, HR professionals may compare the resume content to the application content in order to identify inconsistencies. Further, some HR professionals prefer to use the application as the primary source of applicant information for screening purposes (rather than using the resume) due to the organization and consistency of presentation of this information in the ATS or HRIS. A participant explained:

We are screening applications. So, we have to have a true application on file for you to be considered for a position with our company. We do not take just resumes. And really it's just a little more information than what you may find on the resume. So, it will break down various specifics, as far as, even if a lot of it is on the resume, most of the time it will ask do you have: what are your previous job experiences for the past 10 years and it will go through each of those different employers. It goes through your education. We are looking at that to verify what they have on their application, that it's correct or to see if there's any inconsistencies to make sure there's not any missing information.

These two resume screening paradigms emerged from the interview data as a result of triangulating participants' descriptions of their resume screening approach with subsequent interview content on how they learned to screen resumes. Based on this

analytical procedure, a pattern emerged from the data upon which the two paradigms were founded. For the 12 study participants, the pattern of resume screening paradigm adoption was:

1. If the HR professional possessed previous experience in high volume recruiting, then he adopted the first resume screening paradigm, only reviewing resumes for information related to the minimum qualifications of the position.
2. If the HR professional was currently working in an organization that has an established norm of only screening resumes for minimum qualifications, then she adopted the first resume screening paradigm.
3. Otherwise, the HR professional adopted the second resume screening paradigm and reviewed all resume content during the resume screening sub-process. Further, these HR professionals have not received formalized training on their organizations' objectives or norms for resume screening. As such, they appear to have adopted the second paradigm of resume screening based on their experience working in both their current and previous organizations.

The third and final activity in the resume screening sub-process is the elimination of applicants. Based on the analysis of the transcripts of study participants, the elimination activity takes three key forms: (1) applicants are eliminated purely based on whether they fail to meet the minimum qualifications of the position description, (2) applicants are *only* eliminated if they are grossly underqualified based on the minimum qualifications of the position description, or (3) applicants are eliminated based on a

variety of criteria. The form of this activity is undergirded by the resume screening paradigm adopted by the HR professional. Each form of this activity is outlined below.

*Elimination Based on Not Meeting Minimum Qualifications.* HR professionals eliminate applicants who, in their judgment, do not meet the minimum qualifications of the position. If the applicant does not meet the minimum qualifications of the position based on the HR professional's review of the resume, they are immediately eliminated from the applicant pool. This type of elimination decision-making framework may be associated with either of the two paradigms of resume screening outlined above. A participant described the elimination process as:

I think a lot of folks and for different reasons may apply to positions, kind of knowing that they may not qualify to be honest...Some are very simple to decline right away just based on not meeting the minimum qualifications or lacking any type of relevant experience to that particular opening.

*Elimination Based on Gross Unmet Qualifications.* HR professionals eliminate applicants who, in their judgment, are grossly underqualified for the position. While some applicants may not meet all of the minimum qualifications of the position, only those that are grossly underqualified are eliminated from the applicant pool during resume screening. For example, if the position requires ten years of progressive management experience, an applicant with seven years of managerial experience may not be eliminated from the applicant pool, but an applicant with two years of managerial experience would be eliminated. This type of elimination decision-making framework may be associated with either of the two paradigms of resume screening outlined above. A participant described this process as follows:

I look for traditional bank titles like Bank of America, Wells Fargo, BBT, Compass, you know any big name bank. Those are basically the triggers that I have. If they have the experience, and it's from one of those big banks, then I'm definitely going to go to an HR phone screen. But they do have to have a couple of years [of experience]. If they have like six months as a branch manager, in that case, I probably would not talk to them.

Another participant described a similar process for eliminating grossly underqualified applicants; however, in this case, she describes how applicants who are not a great fit with the minimum qualifications are considered “maybes” and are not eliminated based on the resume screening sub-process. She stated the following:

You start reviewing the applicants that have come in. And so then we would, you know, you basically just start going through the candidates. And so, from that, selecting ones that they're telling you: yeses, nos, or maybes. And so reaching out for sure to the ones that are yeses. And so that would be the first, for yeses, we would go through and try and schedule those pre-screens or phone interviews with candidates. The ones that are maybes, you know, you kind of leave in Workday. You know, just maybe some of the yeses don't work, you might look at them. So, for our branch manager positions, we really are looking for someone who has had manager experience previously. And I would say 90% of the time, at least in banking, just because to come in and be a branch manager in a branch, I mean, you need to know about the industry and the systems, and the policies and procedures, and things like that that are in place.

So I would say the first thing is I need to scroll through and see what their job experience looks like. If they don't have any management experience, they definitely would fall more on that no to maybe or maybe. You're really looking at those ones that do have manager experience. Kind of start in that yes bucket and then you review those further.

*Elimination Based on a Variety of Criteria.* HR professionals eliminate applicants based on several criteria and a comprehensive review paradigm of resume screening. Applicants are eliminated based on a HR professional's judgements of their *soundness* for the position using a combination of criteria including previous experience, education, and resume presentation. This elimination decision-making framework is only associated with the comprehensive review paradigm outlined above. One study participant described her applicant eliminations as follows:

If they don't meet minimum qualifications, we're not going to call them. If they don't look like they've had stability or what have you, they've been job hopping and only been at jobs for six months or what have you, we're not going to call them and screen them.

Another participant described the elimination activity as follows:

If it's a branch manager versus a business banker, then you would kind of consider the job competency. You would review the resume looking for the details of that job competency. For example, if it's sales, that the job requires this person to be a sales person, then you're looking for that work experience on the resume.

A couple of things, you're looking to see if it's well written and organized. You're looking to see what type of managerial experience they have: what are the details



of that experience, how many direct reports of that information is listed on their resume, what leadership experience they have, the educational background, the organizations that the applicant has worked for, recognizing that the culture of some organizations is going to effect the type of managerial experience they have. Again, we use the service to gap in employment, and then if there's been any demotions in their manage experience saying if they went from a mid-level manager...if they went from an executive leadership managerial role to a mid - level manager, that would be a demotion, and cause some concern.

The elimination activity is the final step in the resume screening sub-process. It occurs continuously during the application period as the resumes and applications of new applicants are screened. Finally, it does not preclude prospective eliminations of applicants that may result from their performance in screening interviews, face-to-face interviews, or testing.

Based on study participants' descriptions of the resume screening sub-process, a complex interaction between the HR professional's experience, organizational norms (e.g., only screen resumes for minimum qualifications), the position description, role schemas, and other influencers (e.g., initial meetings with hiring managers) determine both the resume screening criteria and the basis for the elimination of applicants from the hiring pool. For example, the use of role schemas was evident in study participants' descriptions of their resume screening practices. But, role schemas were not referenced by participants as a "stand alone" construct that directly determine resume screening criteria or other sub-process features. Rather, role schemas appear to be a factor that interacts dynamically with other influencers of resume screening criteria including the

position description and meetings with the hiring manager. Moreover, some hiring processes include activities (e.g., meeting with the hiring manager) that emphasize or reinforce the construction of role schemas that are subsequently used in the resume screening sub-process and other hiring activities. One participant described the intake meeting with the hiring manager in the following way (that emphasizes the role schema construction):

One of the questions we ask in that intake meeting with the manager is: what does an ideal resume look like? What are some past or current job titles that this person may have held? Questions like that that will help point out what an ideal resume looks like is going to be a great starting point.

The use of role schemas by resume screeners is a supporting construct discussed in the published literature (Chen et al., 2011; Cole et al., 2007); however, the extant research does not explain how role schemas are used within the resume screening context.

Figure 2 below depicts the relationships between resume screening paradigms, other screening criteria sources, and activities associated with study participants' descriptions of the resume screening sub-process for managerial job applicants. The figure incorporates features or influencers on the resume screening sub-process that are discussed in later sections of this chapter (e.g., the determination of resume screening criteria based on the position description).

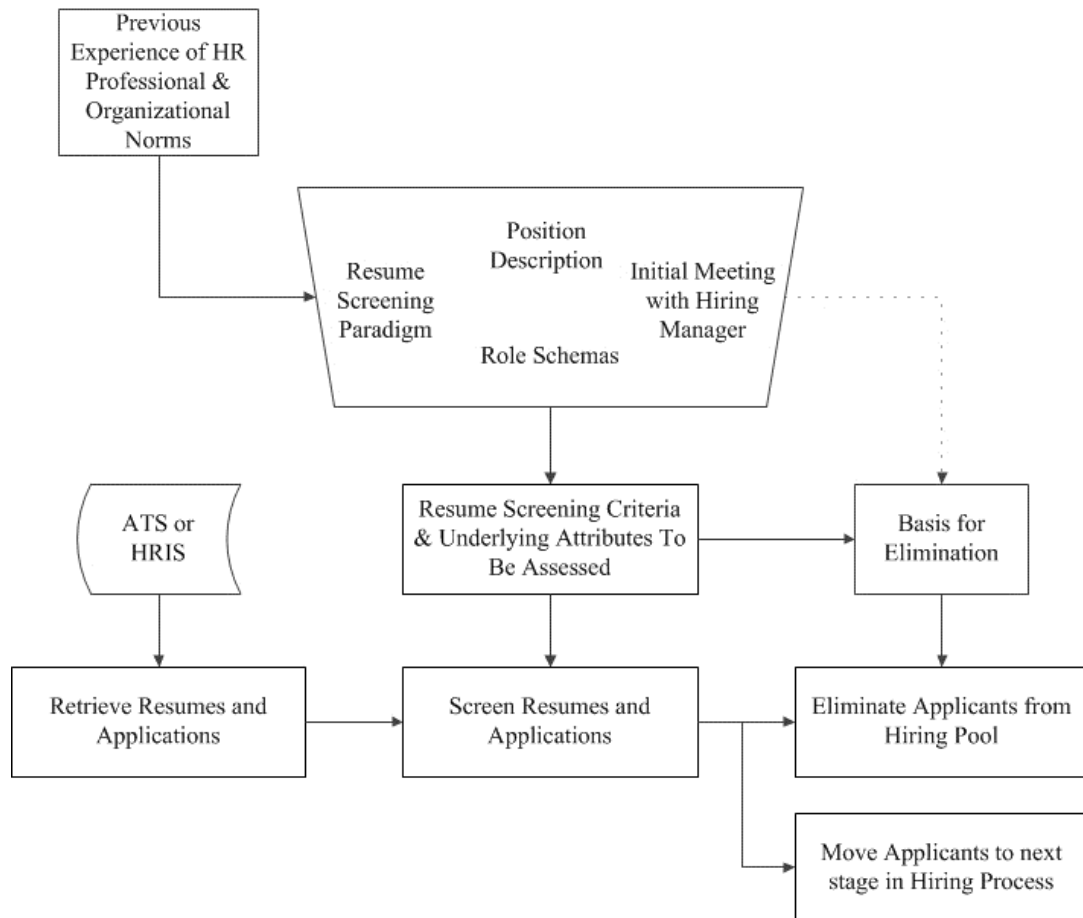


Figure 2. Resume Screening Sub-Process for Managerial Applicants

One important aspect of the resume screening sub-process is its comprehensive nature. Based upon the explanations provided by study participants, the resume and application of every applicant is reviewed and screened by the HR professional during the resume screening sub-process. These organizations do not eliminate applicants from the hiring pool based on automated decisions or selections made by their ATS or HRIS. Rather, every applicant's resume and application are screened by a HR professional, and elimination decisions are based on the results of the screening sub-process. Several study participants stated that this comprehensive approach was designed to ensure EEOC compliance that requires applicants to be evaluated solely on the objective requirements

of the position. One participant described the logic behind this practice (when asked if his organization used the ATS to search for or screen applicants) as follows:

We're not allowed to do that [search for or screen out applicants in the ATS based on keyword searches]. That's like going into LinkedIn and doing a search. We're not allowed to do that. That violates all the EEOC laws. They have to apply online, apply to the job. We review every resume to see if they meet the minimum qualifications for the job.

Another participant described a similar justification for reviewing all resumes and applications as follows:

In addition, of course, we have regulations, federal regulations, that govern recruiting practices, such as Affirmative Action. You're trying to make sure that there aren't any discriminatory practices, especially being that this is an equal employment opportunity employer. You're making sure that your screening process is not discriminatory towards a protected classification.

Based on the study participants' descriptions of the resume screening sub-process, there was ample evidence that resume screeners make a range of inferences related to hireability when screening managerial applicants' resumes. Many direct quotations presented previously in this chapter substantiate this claim. Past research indicates that these inferences moderate the relationship between resume biodata elements and hireability judgements (i.e., decisions to eliminate an applicant from the hiring pool; Brown & Campion, 1994; Chen et al., 2011; Cole et al., 2007; Tsai et al., 2011). In essence, the decision-making process used by resume screeners includes three activities: (1) reviewing the resume biodata elements, (2) making inferences related to the

applicant’s suitability for the position, and (3) making the keep/eliminate decision (Chen et al., 2011; Cole et al., 2007). The results of this study add further support for these research findings and are consistent with the principles of attribution theory (also widely discussed in the literature).

Table 11 provides a summary of the descriptive content related to the resume screening sub-process. The table includes the topics that emerged from the synthetic analysis, descriptions of the topic (i.e., phenomena), and the level of convergence among the participant descriptions (i.e., level of consistency). The levels of convergence presented in the table (and in subsequent tables that summarize the results for each research question) are based on the following scaling:

- High: Greater than 70% of participant content was aligned;
- Medium: 40% to 70% of participant content was aligned; and
- Low: less than 40% of participant content was aligned.

Table 11 *Summary of Resume Screening Sub-Process Descriptions*

| Topic                    | Description   | Level of Convergence of Participant Descriptions |
|--------------------------|---|--|
| Resume Screening Process | Sub-process comprised of three activities: <ol style="list-style-type: none"> <li>1. Receipt of resumes and applications</li> <li>2. Resume screening</li> <li>3. Applicant elimination(s)</li> </ol> | High   |

Table 11 Continued

|  |  |                                 |
|--|--|---------------------------------|
| HR professional Approach to Resume Screening | Two paradigms:<br>1. Minimum Qualifications Review<br>2. Comprehensive Review  | Medium<br>Medium                |
| Resumes Screening Paradigm Adoption          | Three drivers:<br>1. Previous experience in high volume recruiting<br><br>2. Organizational norm of minimum qualifications review<br><br>3. No norms or training within organization | Low<br><br>Medium<br><br>Medium |
| Application Elimination Forms                | 1. Not meeting minimum qualifications<br>2. Gross unmet qualifications<br>3. Variety of criteria   | Medium<br><br>Low<br>Medium     |
| Comprehensiveness of Resume Screening        | All resumes/applications screened by HR professional   | High                            |

Note: The level of convergence for each topic or description is based on the level of consistency of description across all 12 study participants.

### *Fit Within Overall Hiring Process*

Secondary Research Question 1: How does resume screening fit within the overall hiring process for managerial applicants?

The resume screening sub-process is the first major sub-process in the overall hiring process for all of the organizations represented by the study participants. All study participants described the resume screening sub-process as an integral part of their organizations' hiring processes. Further, resume screening was always positioned within the overall hiring process in the same manner, directly following the posting of the

position in the ATS/HRIS and after downloading resumes and applications from the system. Figure 3 below contains a flowchart of the hiring process for managerial applicants and all of its activities as described by study participants. The majority of these process activities are well-described in the existing OB literature (Huffcutt, 2011; McDaniel et al., 1994; Moscoso, 2000; Schmitt, 2012; Viswesvaran & Ones, 2010). The flowchart includes several activities that were not universally represented in all of the hiring processes of the participants' organizations (shown as dotted-line boxes in the figure). These include conducting a meeting between the HR professional and the hiring manager (i.e., an intake meeting), searching for potential applicants on LinkedIn, Indeed or other websites, and conducting applicant testing. Each of these variations is described below.

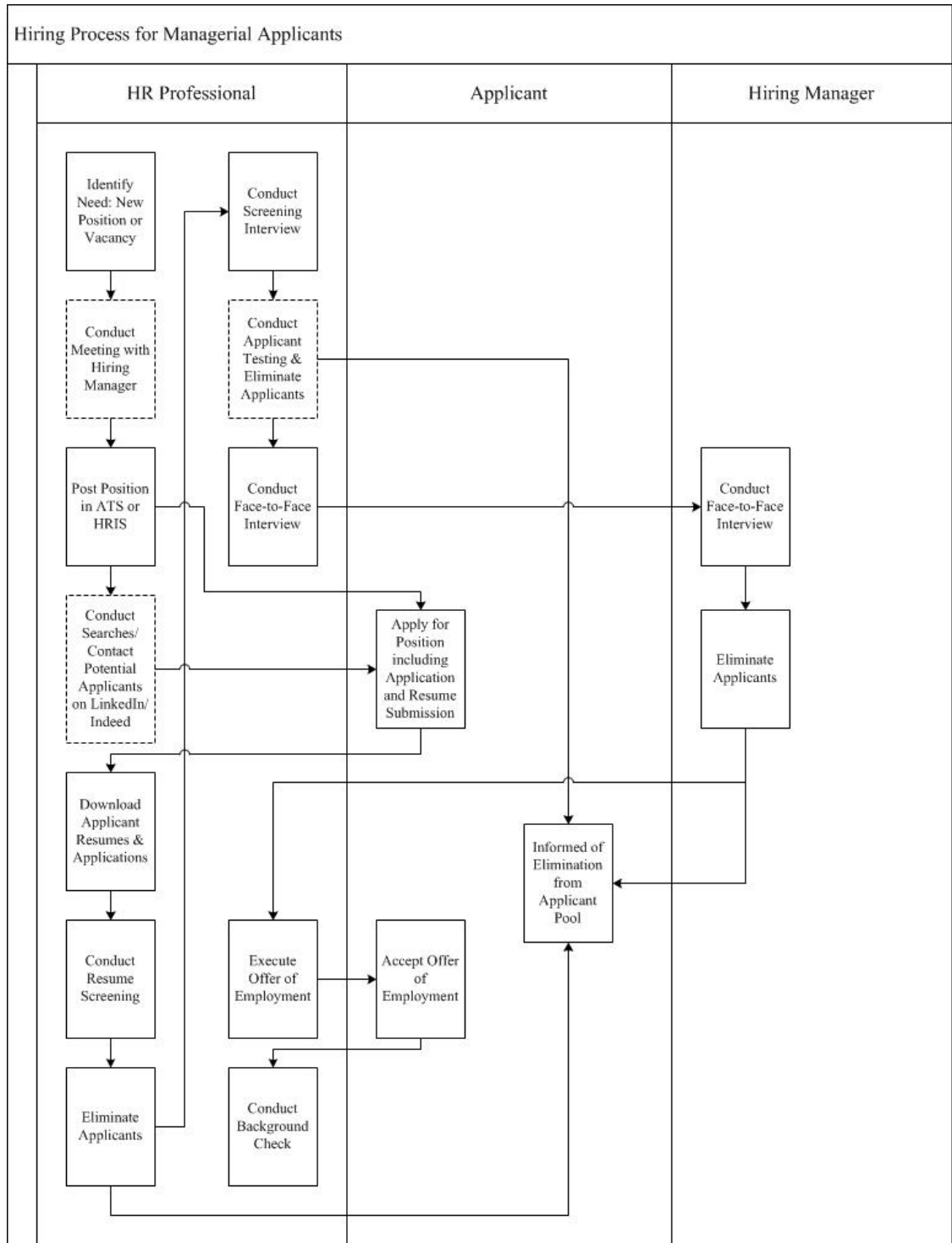


Figure 3. Hiring Process for Managerial Applicants

When describing the overall hiring process, linkages or influencers between process activities and the resume screening sub-process emerged. First, inputs from other



hiring process activities were described as influencers on the resume screening criteria used by participants during the resume screening sub-process. These influencers include the content of the position posting and the initial meeting with the hiring manager. For example, one participant simply described how the position description content influences her screening criteria as follows: “We are looking at their experience to determine who best fits the needs of the position [description].” Another participant explained the source of minimum qualifications as follows: “It's on the job description. It's posted when we post a job. It'll give [them] what we're looking for.”

The inferences and attributions made by HR personnel during the resume screening sub-process also influence other sub-processes and activities performed subsequently during the hiring process. For example, a HR Generalist's attributions or concerns from the resume screening sub-process frequently determine the questions asked during subsequent screening interviews conducted by the HR Generalist. One participant described how her attributions may impact other hiring process activities as follows:

If it's a poorly written resume you cannot let that disqualify your candidate. You're still looking for the job experience to make sure that if this candidate has what the requisition is stating that you'll need, then you want to be fair in still considering that person through the rest of the process. But keeping in mind you're making sure that you're picking up on whether or not this candidate is going to be [a] laissez-faire manager. You're addressing that in your interviewing questions. So I want to be clear in making sure that doesn't disqualify them.

That's just an indication that you might want to target more specifically in your interviewing processes.

*Hiring Process Variations.* Some study participants described hiring activities that are not present in all of the organizations represented by the study participants. In addition, these activities are not well-described in the existing OB literature. A description of these activities and their context in the overall hiring process are presented below.

In some organizations, the hiring process begins with a preliminary meeting between the HR professional and the hiring manager before the position is posted for applicant response. In this preliminary meeting, the HR professional seeks input from the hiring manager on topics including: (a) confirmation that the position is needed and approved, (b) level of consistency between the hiring manager's expectations and the position description, (c) the attributes of *ideal* applicants for the position, and (d) the current or past job titles or positions an ideal candidate may have held. The meeting is a source of hiring criteria that are used in resume screening, screening interviews, and face-to-face interviews; however, this activity is not present in the majority of the hiring processes of the organizations represented by study participants. One study participant described this meeting as follows:

Let's see, so obviously understanding the position itself first and having what we would call our intake meeting with the hiring manager and making sure that their expectations do match with the job description. Really that would be for any position, but specifically for manager level positions, you do want to understand exactly the type of mix of soft skills and management skills and technical skills,

really understanding if management or past supervisory or management experience is an absolute must or if the technical experience is going to outweigh that supervisory experience.

A few participants also stated that their hiring process included an activity in which they actively search for potential applicants on employment-related websites such as LinkedIn and Indeed. This activity is conducted during the period of time that the position is open in the organization's ATS. Further, the participants stated that they were not actively pulling resumes or other data from these websites and placing individuals into the applicant pool. Rather, they are sending messages to potential applicants through these websites to notify them of the position and encouraging them to apply. One participant described this activity as follows:

We also use, for example, LinkedIn, especially for those managerial level positions. I'm not sure if you're familiar with it, but on LinkedIn, you have the option whether or not to collect those resumes directly in LinkedIn Recruiter. It's usually more effective because those folks on LinkedIn are really more passive. You do have the option to direct them to your website and do the full application, but just reporting has shown that there is quite a drastic drop in interest for those types of applicants.

The final area of divergence in the hiring processes for the participants' organizations is the presence and extent of applicant testing. Most study participants indicated that their organizations used applicant testing as a part of the hiring process. Such testing may be used to eliminate applicants (based on testing results) or simply used to inform the overall hiring process. In either case, applicant testing was dependent on

the position (if present in the participant’s organizational process). Many participants described applicant testing as mandatory for branch manager positions. In contrast, when discussing positions within business banking, trust operations or other non-retail positions (e.g., Internal Audit), participants stated that applicant testing was optional or not conducted at all.

Table 12 presents the summative results of the participants’ organizational hiring processes and the “fit” of the resume screening process.

Table 12 *Summary of Hiring Process Descriptions and Fit of Resume Screening Sub-Process*

| Topic  | Description   | Level of Convergence of Participant Descriptions |
|--|---|--|
| “Fit” of resume screening sub-process in hiring process                          | First sub-process within overall hiring process   | High   |
| Linkage between resume screening sub-process and other hiring process activities | 1. Influencer (input): Content of position posting  | High   |
|  | 2. Influencer (input): Meeting with hiring manager  | Low  |
|  | 3. Influencer (output): Screening interview questions   | Medium   |
| Hiring Process Activities  | <u>HR Professional:</u><br>1. Identify need for position<br>2. Post position in ATS or HRIS<br>3. Download applications/resumes from ATR or HRIS<br>4. Conduct resume screening<br>5. Eliminate applicants<br>6. Conduct screening interviews | High   |

Table 12 Continued

|                                    |  |        |
|------------------------------------|--|--------|
|                                    | 7. Conduct face-to-face interviews   |        |
|                                    | 8. Execute offer of employment   |        |
|                                    | 9. Conduct background check  |        |
|                                    | <u>Applicant:</u>  | High   |
|                                    | 10. Apply for position including submission of application/resume                          |        |
|                                    | 11. Receive notification of elimination from applicant pool                                |        |
|                                    | 12. Accept offer of employment   |        |
|                                    | <u>Hiring Manager:</u>   | High   |
|                                    | 13. Conduct face-to-face interviews  |        |
|                                    | 14. Eliminate applicants   |        |
| Hiring Process Activity Variations | <u>HR Professional:</u>  |        |
|                                    | 1. Conduct meeting with hiring manager   | Low    |
|                                    | 2. Conduct searches and contact potential applicants on LinkedIn, Indeed or other websites | Medium |
|                                    | 3. Conduct applicant testing and eliminate applicants                                      | High   |

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Note: The level of convergence for each topic or description is based on the level of consistency of description across all 12 study participants.

*Use of Applicant Tracking or e-Recruiting Systems*

Secondary Research Question 2: How are applicant tracking or e-recruiting systems utilized during the resume screening process for applicants of managerial jobs?

Applicant tracking or HRIS systems were used within the organizations of all the study participants. These systems support the hiring process in three main ways: (a) to post open positions for the submission of resumes and applications, (b) to receive

resumes and applications electronically from both internal and external applicants, and (c) to track, monitor, and report on applicants during the hiring process. The third item includes the support of a number of activities (dependent on the systems' functionalities) including establishing basic screening questions on the application, provisioning of applicant tests, scheduling interviews, creating and sending offer letters, and assigning eliminated applicants to other position pools. In essence, the systems are used to track and report applicant data and results in a comprehensive manner.

Based on the study participants' descriptions of their organizations' uses of ATS and HRIS, it became apparent to the researcher that system usage is shifting the resume screening sub-process within these organizations. In the past few decades, the submission of the applicant's resume was a primary means through which an applicant applied for a position (Wright, Domagalski, & Collins, 2011). Further, screening of resumes has been a primary means through which employers evaluate the suitability of applicants in an effective and low-cost manner (as perceived by employers; Dipboye & Jackson, 1999). However, study participants' descriptions of their use of ATS and HRIS indicated that the primacy of the resume in the hiring process may be waning. For example, several study participants with modern systems (e.g., Workday) conveyed that their application/resume screening processes often included the following features: (a) initial screening questions for applicants such as whether an applicant is authorized to work in the United States, (b) application blanks<sup>21</sup> that require an applicant to provide titles, dates of employment and related narrative descriptions associated with previous

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<sup>21</sup> Application blanks "typically request information about previous jobs held, educational level and type, and any special skills" (Schneider & Schmitt, 1992).

employment for a specified period of time (e.g., the past ten years), (c) application blanks for educational attainment with associated details, and (d) application blanks for certifications and licenses with associated details. All of these features of the application process were associated with use of the ATS or HRIS in the participants' organizations. One participant described multiple uses of her organization's HRIS throughout the hiring process as follows:

- “We would go out and post that position on Workday, you know, using the title, location and then any other information specific to the position”.
- “Internal candidates still have to apply through Workday”.
- “then we create their offer letter in Workday”.
- “then we will get the green light in Workday (following the background check), once the results have come back, and if they're good to go”.

Another participant described the importance of her organization's HRIS in the following way:

It's our main system: so everything is done on the system. In order to be considered for a position, you have to create [a] profile, and you have to submit your profile along with your application and resume to the position that you're interested in. From that point, we schedule interviews in the system, we move you to the next process to speak with HR reps in the system, any interview you have: all of that is captured in the system. Also, it places you into background [check needed status]. So once you're in background [check needed status], our [background checking] vendor gets a message to run the background [check].

They respond, and when they respond, it's all system updated. Everything we do

is in the system. We couldn't progress without having a candidate apply, and interview, and go through that process.

While none of the study participants used internal e-Recruiting systems, many of them utilize public facing online professional networking and recruiting websites such as LinkedIn and Indeed. The study participants depicted their use of these sites as tools used to search for potential applicants for open positions. In this activity, a HR professional searches for potential applicants on the site and contacts potential applicants with information on the position. In this scenario, applicants were still required to use the organization's ATS or HRIS to apply and submit their resume and application.

Table 13 presents the summative topics, synthesized descriptions, and level of convergence among study participants on the hiring process and the "fit" of the resume screening sub-process within it.

Table 13 *Summary of Use of ATS/HRIS in Hiring Process*

| Topic              | Description   | Level of Convergence of Participant Descriptions |
|--------------------|---|--|
| Use of ATS or HRIS | 1. To post open positions for applicant response  | High   |
|                    | 2. To receive resumes and applications electronically from applicants (internal and external) | High   |
|                    | 3. To track, monitor, and report on applicants during the hiring process                      | High   |



Table 13 Continued

|   |   |        |
|---|---|--------|
| Changing nature of hiring/resume screening process based on ATS or HRIS use | 1. Initial screening questions for applicants   | Medium |
|   | 2. Application blanks for previous work experience, educational attainment, and certifications and licenses | Low    |

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Note: The level of convergence for each topic or description is based on the level of consistency of description across all 12 study participants.

### *Resume Screening Criteria*

Secondary Research Question 3: What are the criteria used by HR personnel when screening the resumes of managerial applicants?

Study participants identified the following eight criteria for eliminating managerial applicants when screening their resumes: (a) previous managerial work experience (duration and scope), (b) previous industry work experience (banking: duration, scope, and type of organization), (c) previous functional work experience (sales: duration and scope), (d) job stability (duration in positions), (e) educational attainment (type and level), (f) resume presentation (i.e., organized and well-written), (g) licensing, and (h) community involvement. While this list is inclusive of all elimination criteria used by the study participants, most of the study participants only make elimination decisions during the resume screening sub-process based on the first four criteria. HR professionals that use the *Minimum Qualifications Review* paradigm for resume screening dominantly use the first two criteria in making elimination decisions. In contrast, HR professionals that use a *Comprehensive Review* paradigm may use any or several of these criteria in making elimination decisions.

The research literature identifies a number of underlying applicant attributes that HR personnel assess based on resume biodata items (Burns et al., 2014; Chen et al., 2011; Cole et al., 2003b; Cole, et al., 2009; Martin-Lacroux & Lacroux, 2017). The underlying attributes assessed by HR personnel when screening experienced applicants are likely to differ from those in the extant literature since these studies typically focus on impending or recent college graduates (Cole et al., 2004; Rynes et al., 1997; Tsai et al., 2011). As such, the researcher analyzed the study participant transcripts for descriptive evidence of the underlying applicant attributes that HR personnel seek when screening managerial job applicants.

Table 14 contains the screening criteria identified by study participants, the applicant attributes identified within the research literature related to these criteria (Burns et al., 2014; Chen et al., 2011; Cole, et al., 2003b; Cole et al., 2009; Martin-Lacroux & Lacroux, 2017), and the applicant attributes identified during study participant interviews. Where differences between applicant attributes identified in the literature and those identified in this study exist, the underlying attribute has been italicized.

Table 14 *Elimination Criteria and Related Applicant Attributes Comparison*

| Elimination Criteria  | Applicant Attributes Being Assessed based on research literature (impending or recent college graduate) | Applicant Attributes Being Assessed based on interview content (managerial) |
|---|---|---|
| 1. Previous managerial work experience (duration and scope) | <i>GCA</i> , Interpersonal Skills, and Motivation   | <i>Job-related knowledge</i> , Skills                                       |

Table 14 Continued

|  |   |   |
|--|---|---|
| 2. Previous industry work experience (banking: duration, scope and type of organization) | Not in body of research   | <i>Job-related knowledge, Skills, PJ fit and PO fit</i> |
| 3. Previous functional work experience (sales: duration and scope)                       | Not in body of research   | <i>Job-related knowledge and Skills</i>                 |
| 4. Job stability (duration in organizations)   | Agreeableness and Openness to Experience  | <i>Conscientiousness</i>                                |
| 5. Educational attainment (type and level)   | GCA and Conscientiousness   | Not identified  |
| 6. Resume presentation   | Conscientiousness, Extraversion, Emotional Stability and Skill (Written Communication)    | Conscientiousness                                       |
| 7. <i>Licensing</i>  | Not in body of research   | <i>PJ fit</i>   |
| 8. Community involvement   | Extraversion, Conscientiousness, Emotional Stability, Interpersonal Skills and Motivation | <i>PJ fit</i>   |

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Source of applicant attributes: Brown & Campion (1994), Burns et al. (2014), Chen et al. (2011), Cole et al. (2003a), Cole et al. (2009), and Martin-Lacroux & Lacroux (2017).

As Table 14 illustrates, significant differences between the resume screening criteria and underlying attributes assessed for managerial applicants when compared to the extant findings in the research literature. For example, study participants did not describe resume screening criteria or desired applicant attributes in any way that related

to an assessment of the applicant's level of GCA. When study participants described the criteria that they use to screen the resumes of managerial job applicants, they did not include descriptive terms such as intelligent, smart, "best and brightest", learning-oriented, or other modifiers that are associated with GCA. This finding contrasts with those of other studies on resume screening that report recruiters making inferences related to GCA based on resume biodata (Chen et al., 2011; Cole et al., 2003a, 2003b). This finding, however, is not unexpected since the biodata elements upon which GCA inferences are based (in the research; e.g., GPA, academic awards) are not present on the resumes of experienced job applicants.

When the researcher analyzed participant interview transcripts, other differences emerged that contrast with the extant research literature on the underlying applicant attributes that are assessed by HR personnel during the resume screening sub-process. As noted above, these observations (as documented in Table 14), while not unexpected, provide insight into the differences between the attributes assessed for experienced job applicants compared to college-educated entry-level job applicants. The researcher's findings include:

- Job-related knowledge and skills, based on previous work experience, are two fundamental attributes that are assessed by HR personnel when screening the resumes of managerial applicants. When study participants described the use of previous work experience as a resume screening criterion (in the various forms previously discussed in this chapter), they frequently mentioned the importance of knowledge (e.g., banking regulations) and skills (e.g., leadership, supervisory, coaching, communication) in managerial job

performance. This logic is consistent with the empirical research of Dokko et al. (2009) and the causal pathway between knowledge acquisition and performance outlined in McDaniel et al. (1988).

- PJ fit is assessed in a few ways when HR personnel review a managerial applicant's resume. The scope, duration, and type(s) of organizations worked for within an applicant's industry work experience may be used to assess PJ fit. Study participants explained that applicants who possess experience in certain types of organizations (e.g., credit unions) may not make them good candidates for a job in their organizations. Specifically, several participants expressed concerns that an applicant with this type of industry experience might not possess the knowledge and skills required to perform the job in their organization (e.g., a lack of business sales experience).
- PJ fit is also assessed by HR personnel from resume biodata items such as licensing and community involvement. In this case, the resume screener is assessing the level of complement between the applicant's KSAOs and the job requirements (Kristoff-Brown, 2000; Kristoff-Brown et al., 2005; Tsai et al., 2011). Several study participants mentioned job requirements for certain positions (e.g., branch managers, business bankers) that require certifications to sell products such as annuities and life insurance. Further, similar needs for certain positions to be involved in community organizations (e.g., the chamber of commerce) to generate business leads were discussed.

- PO fit may also be assessed by resume screeners based a comparison between the perceived culture(s) of the organization(s) the applicant has worked at previously and the culture of the hiring organization.
- Job stability is an important criterion used to assess managerial job applicants during resume screening; however, this criterion has received little attention in the research literature (included as a variable in Burns et al., 2014 only). This criterion is used in the assessment of managerial job applicants during resume screening, and negative inferences made by the HR professional (e.g., the applicant job hops) may result in elimination of the applicant from the hiring pool.
- Conscientiousness was the only personality factor explicitly described by study participants in the context of resume screening. Study participants did not refer to the applicant attribute as conscientiousness. In contrast, they used terms such as “a lack of attention to details”, “lethargic”, and “poorly organized” to describe applicants that are perceived to be lacking in conscientiousness. Interestingly, study participants only described the assessment of the lack of this personality factor in the context of the aesthetics and presence of errors (e.g., spelling, grammatical) on applicant resumes. The focus on the resume presentation and its impact on elimination decisions is consistent with the findings of Martin-Lacroux and Lacroux (2017). Other personality factors were not explicitly discussed by study participants; however, it is likely that HR personnel infer other personality factors during resume screening (Burns et al., 2014; Cole et al., 2009; Cole et al, 2007).

- Educational attainment was discussed very little by study participants when enumerating resume screening criteria and in subsequent explanations of the resume screening sub-process. One participant stated:

This position: you don't have to have a specific level of education to be in it. And, so nothing is required from that perspective. So I'm not, you know, you may take note of where they went to school, or what they have a degree in. But, it's nothing that is a requirement. So it's not a main focus.

- The lack of focus on educational attainment by study participants may be attributable to two potential causes. First, the types of positions that study participants may have been thinking about during their interviews do not require college degrees (e.g., branch managers). Second, study participants may believe that formal education, particularly in the distant past, does not have an impact on an experienced managerial applicant's hireability (i.e., it's not a predictor of future performance). This point of view is inconsistent with research findings (Ng & Feldman, 2009).

While these differences in applicant attributes are likely to result from the differences in resume biodata elements (between impending or recent college graduates and experienced managerial job applicants), the research methods used in the published research literature may also be a source of such differences. The majority of the resume screening research uses positivist approaches to determine the relationships between resume biodata items, inferences made by resume screeners, various trait measures (e.g., GCA, personality, knowledge, skills), and hireability measures. These studies typically

focus on determining whether statistically significant relationships between study variables exist rather than on building knowledge of resume screening practices based on empirical evidence. As such, the variables used are limited by the research tradition with incremental additions over time (e.g., resume aesthetics variables were added into resume screening studies from 2011 and later).

Table 15 presents the summative results on the resume screening criteria used by study participants. The level of convergence among study participants, which depicts frequency of use for each criterion, is also included in this table.

Table 15 *Summary of Resume Screening Elimination Criteria Descriptions*

| Topic                     | Description  | Level of Convergence of Participant Descriptions |
|---------------------------|--|--|
| Resume Screening Criteria | 1. Previous managerial work experience (duration and scope)                              | High   |
|                           | 2. Previous industry work experience (banking: duration, scope and type of organization) | High   |
|                           | 3. Previous functional work experience (sales: duration and scope)                       | High   |
|                           | 4. Job stability (duration in organizations)   | Medium   |
|                           | 5. Educational attainment (type and level)   | Medium   |
|                           | 6. Resume presentation   | Medium   |
|                           | 7. Licensing   | Low  |
|                           | 8. Community involvement   | Low  |

Note: The level of convergence for each topic or description is based on the level of consistency of description across all 12 study participants.



### *Relative Importance of Resume Screening Criteria*

Secondary Research Question 4: Which criteria are most important to HR personnel in screening the resumes of managerial applicants?

Previous managerial work experience is the primary and most important criterion used by HR professionals when eliminating applicants during the resume screening sub-process. All study participants communicated that previous managerial experience was an absolute necessity for performance in a managerial position. Consequently, the duration and scope of previous managerial work experience is consistently the first content area reviewed on an applicant's resume. As one participant described:

So, for our branch manager positions, we really are looking for someone who has had manager experience previously. And I would say 90% of the time, at least in banking...you need to know about the industry, and the systems, and the policies and procedures, and things like that that are in place.

Another participant described the primacy of previous managerial work experience as follows: "We're looking for at least three to five years of former prior branch management experience, and/or that management experience for a branch manager. Degree always helps, [but] it's not required."

While previous managerial work experience is most important criterion utilized in screening the resumes of applicants, HR professionals assess the content of that experience in several ways. Study participants discussed the following "filters" that they use in analyzing previous managerial experience as described in applicant resumes and applications: (1) duration: number of years of direct managerial experience, (2) breadth: number of employees managed, and (3) nature: level of progressive responsibilities in

managerial positions. Study participants described such filters as more precise criteria used to examine the level of fit between the applicant's experience and the position requirements. In essence, these filters act as qualitative assessments of the applicant's previous managerial work experience that goes beyond strictly quantitative assessment (e.g., number of years). One participant described this evaluation perspective as follows:

Let's just say for example if the position is a director of internal audit, you want to specifically understand what is their experience. For example: presenting to an audit committee board, how big was the audit team that they ran, very specific questions for that type of role.

Another participant described the importance of progressive managerial experience as:

For business banking it was a little bit different. Sometimes they needed somebody that was more experienced in that world. So we would look for somebody that had business banking, that had been a commercial lender, that may have managed a couple of people before because the organization was expanding. We were always looking for that person, we called them A players, that could potentially grow in the role to that management level if they hadn't already been at the management level.

Many study participants communicated the importance of industry experience as an important criterion in assessing managerial applicants. In the course of the interview discussions, study participants explained that knowledge of the banking industry, particularly regulatory frameworks, was critical to managerial job performance in their organizations. As such, participants specifically review applicant resumes for the

presence of banking industry experience and valued applicants who possessed managerial experience in the industry. One participant succinctly expressed, “I think apart from the experience itself, for banking, a lot of times banking won’t be an absolute requirement, but it will be a big plus.”

Resume presentation is also an important criterion used in resume screening that may result in the elimination of applicants from the hiring pool. Study participants explained that they conclude that a poorly formatted resume or one with general content is an indicator of an applicant that is likely to be a “laissez faire” or “hands off” type of manager. Further, these participants emphasized their positions that the resume represented an important aspect of an applicant’s presentation of himself. As such, they expressed convictions that resume presentation is a useful criterion in resume screening and was bolstered by their experience with hiring in the past. One participant described the importance of the resume presentation as follows:

Basically your resume, and this is really a personal preference, so this probably would not be a practice that any other organization might use: this is what I use personally. I know what type of responsibility is going to come along with that managerial role. The resume tells me if this person is going to be a very lethargic manager: in the way that they have organized that resume. Are they trying to give me short, general responses, or is it very detailed and very well-organized. If it's not organized, and it's very short and brief answers that might be a very laissez faire-based manager, if that makes any sense.

At a more summative level, another participant described the importance of the applicant resumes as follows:

The resume is a selling tool. This is the one chance the applicant gets to sell themselves before they ever get to meet the employer. The expectation is it's going to be the selling tool that that applicant has. If it's poorly written and poorly organized that tells you a lot about the applicant.

Previous managerial work experience, previous industry work experience, and resume presentation were the three most important criteria used in the elimination of applicants by study participants. Study participants also discussed the use of previous functional work experience (e.g., business-to-business sales) and job stability (length of service in organizations) as criteria that are used in evaluating applicant resumes. Both of these criteria were may be used by HR professionals as a basis for eliminating an applicant from the hiring pool during resume screening. One participant stated:

If they don't look like they've had stability or what have you. They've been job hopping, and only been at jobs for six months or what have you, we're not going to call them and [phone] screen them.

Another participant stated that job stability was particularly important for managerial applicants as follows:

Job stability is a big one that we look at...especially at the managerial level, where we're looking for a leader to stay and build or continue to build a department. We're not looking for someone who leaves a role every two years for the past 10 years. So if there's a pattern of instability, that's going to stand out for sure.

Finally, participants discussed the use of education, licensing and community involvement as criteria they used in screening resumes. These criteria were not

mentioned by any of the participants as a basis for the elimination of applicants. Rather, they appear to be used to rank applicants (e.g., determining the top applicants to phone screen) or in combination with other criteria. Educational attainment in particular may be used as criteria that augments the managerial work experience criteria. As one participant stated:

In our company, a lot of times it will say you either have to have a certain degree or years of experience. So you could take a degree in lieu of years of experience in some scenarios and vice versa.

In summary, study participants use resume screening criteria in several ways. The most important criteria (previous managerial work experience, previous industry work experience, and resume presentation) are used to make quick and firm elimination decisions. Less important criteria (e.g., previous functional work experience and job stability) are used most frequently to identify top applicants, but these criteria may also be used as a basis for the elimination of applicants. Finally, the least important criteria (educational attainment, licensing, and community involvement) are used merely to rank applicants in most cases. However, a low ranking may also mean that the applicant is never contacted by the organization to move forward in the hiring process.

Table 16 presents the summative descriptions of the relative importance of each resume screening criterion used by study participants. In addition, the table includes the level of convergence among the study participants on the importance of each criterion. The level of convergence, in this case, reflects the level of consistency among participant descriptions of the importance of the criterion rather than its frequency of usage. For example, educational attainment is shown with a high level of convergence even though

it is of low importance. The convergence level indicates that study participants were consistent in their descriptions of educational attainment as a low priority criterion when used in the resume screening sub-process.

Table 16 *Summary of Resume Screening Criteria Importances Descriptions*

| Topic                                      | Description   | Level of Convergence of Participant Descriptions |
|--|---|--|
| Criterion importance                       | <u>High:</u>  |  |
|  | 1. Previous managerial work experience (duration and scope)                               | High   |
|  | 2. Previous industry work experience (banking: duration, scope, and type of organization) | High   |
|  | 3. Resume presentation  | Low  |
|  | <u>Medium:</u>  |  |
|  | 4. Previous functional work experience (sales: duration and scope)                        | High   |
|  | 5. Job stability (duration in organizations)  | High   |
|  | <u>Low:</u>   |  |
| 6. Educational attainment (type and level) | High  |  |
| 7. Licensing                               | High  |  |
| 8. Community involvement                   | High  |  |

Note: The level of convergence for each topic or description is based on the level of consistency of description across all 12 study participants.

### *Sources of Resume Screening Criteria*

Secondary Research Question 5: What are the sources of the criteria utilized by HR personnel in screening the resumes of managerial applicants?

The resume screening criteria used by study participants originate from three sources: (1) the position description, as understood by the HR professional, (2) initial

meetings with hiring managers, and (3) the HR professional's adopted resume screening paradigm and related personal experience. As explained by study participants, position descriptions often include desired applicant attributes and minimum qualifications for the position. The content of the position description is the main source of resume screening criteria associated with education, previous work experience, and licensing.

Initial meetings with hiring managers are also a source of resume screening criteria when such meetings are conducted. In these cases, the hiring manager and HR professional discuss and collaborate on more specific or nuanced features of existing screening criteria (e.g., those derived from the position description). These discussions result in more detailed criteria based on the collective experience of the hiring manager and HR professional with applicants, the hiring process, and the performance of previous hires. For example, the hiring manager and HR professional may conclude that applicants for a branch manager position must possess experience in consumer or business sales in order to be a sound performer. This attribute is then extrapolated by the HR professional into an experience-focused criterion that is used in the resume screening sub-process. Managerial and functional work experience criteria used in resume screening are also associated with this source.

The third source of resume screening criteria is the adopted resume screening paradigm and related personal experience of the HR professional. While many study participants stated that the resume screening criteria they use derive exclusively from the two sources discussed above, other study participants openly discussed criteria they developed based on their own experience. Study participants who use their "own" criteria posit that they *know* what is required to be a successful performer in the position

and how those applicant attributes can be assessed in the resume screening sub-process and other hiring activities. For example, one study participant stated:

It takes a very special person to be a manager, and they have to be able to deal with people. They have to be good communicators. They have to be good listeners. They have to be coaches... You don't want a micromanager. You don't want someone who's not going to develop their associates. You don't want someone who is all for self, and all of that can be determined through your screening process. If you have not properly screened that candidate, you're not going to get the best manager.

The resume screening criteria associated with the adopted paradigm of resume screening and related personal experiences of the study participants include job stability, community involvement, and resume presentation. In organizations that do not have initial meetings between the hiring manager and HR professional, the personal experience of the HR professional may also be the source of managerial and functional work experience criteria.

Table 17 displays the summative descriptions from study participants on the source of resume screening criteria with the associated level of convergence for each source.



Table 17 *Summary of Resume Screening Criteria Sources Descriptions*

| Topic                                | Description   | Level of Convergence of Participant Descriptions |
|--------------------------------------|---|--|
| Sources of resume screening criteria | 1. Position description   | High   |
|                                      | 2. Initial meeting with hiring manager  | Low  |
|                                      | 3. Resume screening paradigm and related personal experience of the HR professional | Medium   |

Note: The level of convergence for each topic or description is based on the level of consistency of description across all 12 study participants.

### *Serendipitous Findings*

Given the qualitative approach taken for this study, additional findings emerged from the study participant interviews and subsequent analysis of related interview transcripts. While these themes were not the primary purpose of this research study, the researcher asserts the potential usefulness for others who intend to study or research organizational hiring processes. In most cases, these findings do not appear to be present in the current body of empirical research on the applicant screening or the hiring processes used by organizations.

*Sourcing of Managerial Applicants.* A few study subjects discussed the sources of applicants for managerial positions during their interviews. Based on this data, managerial job applicants may be identified from a variety of sources. First, HR professionals often actively search and contact potential applicants through online professional networking and recruiting websites such as LinkedIn and Indeed. Several

study participants reported that these applicants had been found to be of lower quality applicants than those from other sources (e.g., internal referrals). Although the perceived quality of this potential applicant pool might be lower than other sources, HR professionals use this sourcing method due to the tight labor markets that exist in their geographical locations.

Applicants for managerial positions are also sourced internally in many organizations. Internal applicants may enter the hiring process in two main ways. Internal applicants may simply respond to the posting for an open position in the ATS or HRIS. These applicants are not openly recruited or identified by HR personnel during the posting period. In contrast, other internal applicants may be recruited into the applicant pool as a result of talent management programs that have identified them previously as *high potential employees* who are prepared for a lateral move within the organization or a promotion. For example, several study participants outlined internal development programs for personnel (e.g., assistant branch managers or head tellers) that result in the identification of individuals who are prepared to move into a managerial role in the organization. As vacancies or new positions become available within the organization, these individuals are contacted by HR or their manager to encourage them to apply for these positions.

Finally, study participants stated that managerial applicants may be sourced through internal referrals; often from executive personnel within the organization. In this scenario, internal personnel, typically senior managers, possess knowledge of potential applicants in the local marketplace that may be well-suited for future vacancies or new positions within the organization. Study participants depicted this sourcing method as

follows: (a) the senior manager (e.g., a regional vice president of retail operations) knows the local banking marketplace through her previous employment and professional network, (b) the senior manager informally recruits members of her network as a potential source of future applicants, and (c) the senior manager contacts members of her network as positions become available that match with the experience and qualifications of network members. Study participants noted that applicants from this sourcing method were still required to use the ATS or HRIS to apply for the position; however, they also stated that challenges existed in obtaining applications from this group of applicants. Candidates for senior-level positions were depicted as somewhat resistant to applying for a position through the organization's normal process.

*Use and Content of Screening Interviews.* All study participants described screening interviews conducted by HR professionals as an integral activity in their organizations' hiring processes. The screening interview activity follows the resume screening sub-process and is typically conducted by the HR professional. The content of these interviews varies among organizations and HR professionals. Some organizations have pre-set question banks used by HR professionals when conducting screening interviews. Other organizations have no formalized set of questions. Typically, the screening interview covers topics such as the geographical location of the position and the applicant, salary history and expectations, employment history, identified issues or gaps resulting from the resume screening sub-process, and managerial capacity (e.g., experience in coaching).

Screening interviews are another activity that may result in the elimination of applicants from the applicant pool. Given the focus of this study, however, the criteria

used by HR professionals to eliminate applicants as a result of this activity were not addressed nor explicitly identified by study participants.

*Use of Applicant Testing.* A significant majority of study participants identified applicant testing as a core activity of their organization's hiring process for managerial applicants. Applicant testing follows the screening interview activity during the hiring process. For managerial applicants, the testing content focuses on determining the behavioral and personality composition of applicants. Testing results may be used as a basis for eliminating applicants from the applicant pool (those who do not attain an acceptable score) or to further inform decision-makers in the hiring process.

Based on the results of this study, the frequency of use of applicant testing for managerial applicants was not determined. However, the study participants indicated that testing was often required for certain positions (e.g., branch managers) and that applicants were eliminated from the applicant pool in some cases based on testing results.

*"Fit" as a Hiring Criterion.* Three forms of *fit* were discussed by study participants during their interviews: (1) person-job (PJ) fit, (2) person-organization (PO) fit and (3) person-group (PG) fit. The assessment of PJ and PO fit as they relate to resume screening have been discussed in this chapter previously. Additionally, several HR professionals in this study expressed concerns about PO fit for managerial applicants that had work experience in other banking institutions. For example, the HR professional might perceive that an applicant from certain banking organizations or organization types (e.g., Bank of America or a credit union) might not be a good fit within their organization. As such, PO was identified as a criterion used across the hiring process, specifically assessed during screening and face-to-face interviews.

PG fit was also identified as a criterion that is used to assess applicants during the hiring process. Specifically, this criterion was used by some study participants when the position being filled was in a mature work group (e.g., a group of business bankers). In this situation, some HR professionals appear to be sensitive to the potential impact of a new group member that may exhibit attributes (e.g., work style) that may be inconsistent with the norms of the group. As such, PG fit may be analyzed during the hiring process, specifically assessed during interviews.

*Hiring Processes for Non-managerial Positions.* Study participants communicated that the hiring process for managerial applicants was substantially the same as the process used for other experienced hires. While the position content, desired applicant attributes, applicant testing protocols, and face-to-face interviews may differ from the content associated with managerial applicants, the hiring process and associated activities for non-managerial applicants is equivalent. The key differentiator of the hiring process for experienced applicants (versus applicants who are entering the workforce for the first time) is the focus on previous employment history and related applicant attributes.

### Summary

This chapter presented the study results based on interviews conducted with the 12 study participants. It documents the resume screening sub-process utilized by HR professionals during the hiring process for managerial positions within the banking and financial services industry. In addition, the study results provide context and additional details on both the resume screening sub-process and the activities within the hiring process. Generally, there was a high level of consistency among the hiring processes and

resume screening sub-processes as described by the study participants. Greater levels of diversity existed in the criteria utilized by study participants when conducting resume screening as well as their relative importances and sources.

The results presented in this chapter provide new knowledge on the resume screening sub-process for managerial job applicants. First, the results establish a formative description of how HR professionals conceptualize and conduct resume screening during the hiring process for managerial positions. Second, the results identify criteria utilized by HR personnel when conducting resume screening and contextualize them with the criteria identified within the body of research on resume screening. Finally, the results provide insight into the overall managerial hiring process, how ATS/HRIS systems are used to support it, and formative descriptions of hiring process activities that have heretofore not been present in the employee selection research literature (e.g., sourcing of managerial applicants and the use of screening interviews).

## CHAPTER V - CONCLUSIONS

This study focused on the resume screening practices used by HR personnel when hiring managerial applicants in the banking and financial services industry. The study examined the resume screening sub-process within the context of the overall hiring process and documented the uses, sources, and relative importances of screening criteria. The results, as documented in Chapter IV, demonstrate considerable differences in the approaches, paradigms and criteria employed by study participants when performing resume screening. Based on this diversity of practices, the resume screening sub-process for managerial applicants appears to lack reliability and validity as a selection method. Further, the study results lend empirical support for theories in the selection literature on the use of role schemas by resume screeners (Cole et al., 2007; Dokko, et al., 2009; Hodgkinson, 2003) and a propensity of hiring personnel to make attribution errors (Knouse, 1989; Ross, 1977) that result in the elimination of qualified applicants from the hiring pool. This chapter also includes a summary of the study, a summary of the study results, and recommendations for future research.

### Summary of the Study

The purpose of this study was to describe the resume screening process utilized by employers when hiring managerial employees. In addition, the study included the collection of descriptive data on the context of resume screening within the hiring process and related systems and criteria used by study participants. The study was conducted using the descriptive phenomenological method, a qualitative research methodology, as established by Amedeo Giorgi (1985a, 1985b, 2009). The method provided the researcher with a clear and consistent set of protocols and procedures for the analysis of

the descriptive data collected during the study. The adoption and fidelity to the descriptive phenomenological method, as described by Giorgi, resulted in the study results and the findings and conclusions presented in this chapter.

### Summary of Results

Analysis of the participants' interview transcripts provided results for the main and secondary research questions. For most research questions, there was a high level of convergence among participants' descriptions of the key processes, process activities, and systems usage within the resume screening and hiring processes. However, considerable divergence existed in areas such as resume screening approaches, paradigms and criteria. Divergence in these areas results from both differences in hiring processes among study participants' organizations and the presence of highly individualized approaches and paradigms to resume screening among study participants. Figure 4 below provides a graphic depiction of the study findings on the resume screening process for managerial applicants.



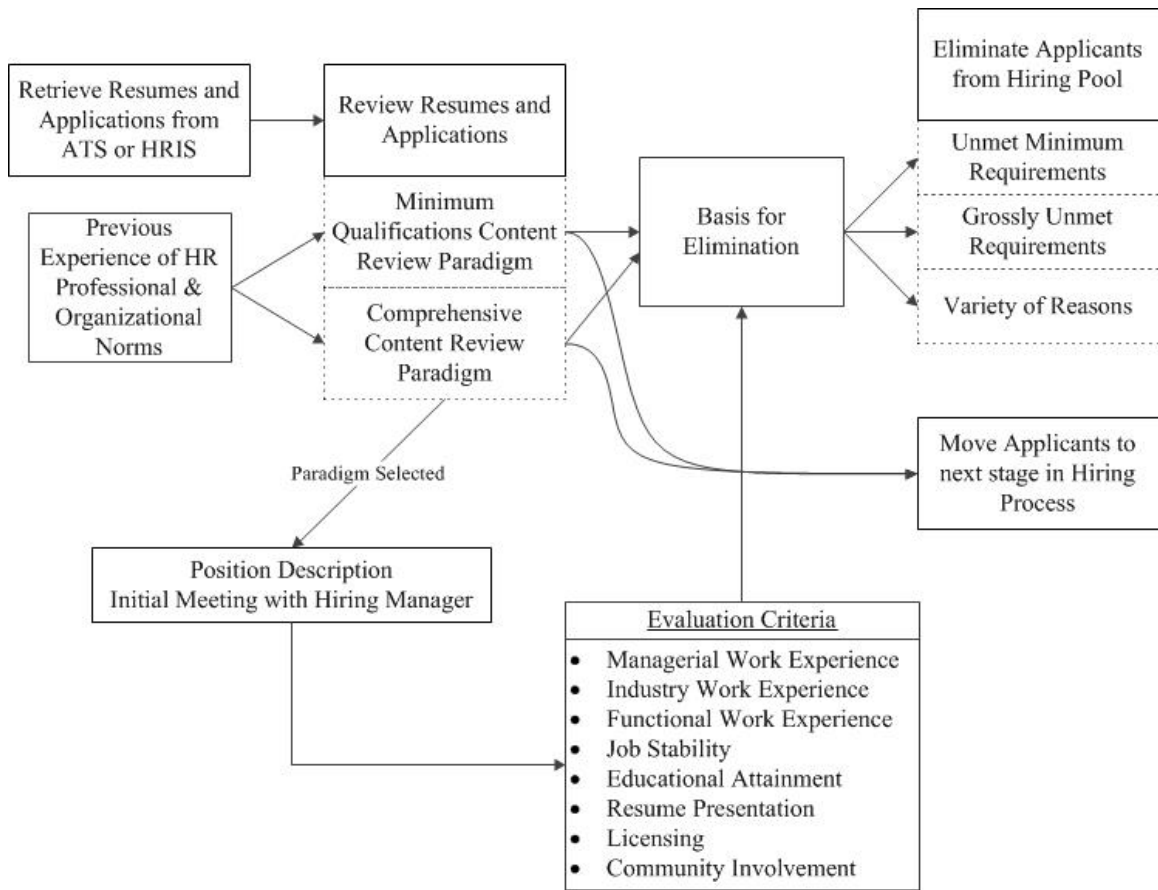


Figure 4. Resume Screening Findings

### Findings, Conclusions, and Recommendations

Four findings emerged from the analysis of the study participants' interview transcripts and the synthesis of the descriptive content across participants. In several cases, the findings provide empirical evidence for theories that are present in the selection literature. However, one finding conflicts with assertions made in the business press related to the use of ATS/HRIS to perform applicant screening. Collectively, the findings reveal a diverse range of adopted practices in the resume screening sub-process. Further, several resume screening practices described by study participants would likely be difficult to defend in legal disputes (since there is little research to support their linkage with job performance). While there is minimal academic research that validates the use

of resume screening as a selection method, organizations should, at a minimum, provide guidance, structure, and training to HR professionals who perform resume screening.

*Finding 1. The use of previous work experience as the dominant criterion when screening the resumes of managerial applicants may result in distortion of the perceived KSAOs of the applicant.*

Study participants, without exception, identified previous managerial work experience as the most important criterion used when screening applicant resumes for managerial positions. In some cases, previous managerial experience and its underlying dimensions was the only criterion used by participants to screen applicant resumes. Study participants often used several “filters” to assess managerial work experience including: (a) duration (number of years of direct managerial experience), (b) breadth of experience (e.g., number of employees managed), and (c) progressive nature of managerial responsibilities in previous positions. However, some study participants used the duration of certain types of applicant experience in a purely quantitative manner when assessing and eliminating applicants during the resume screening sub-process.

*Conclusion for Finding 1.* Utilization of previous managerial work experience as the sole criterion when screening applicant resumes may eliminate qualified applicants from the hiring pool. In many cases, a position posting includes managerial or other work experience minimum requirements that are expressed as duration-based standard for the position (e.g., five years of progressive managerial work experience). While researchers have cautioned against the use of years of experience as a proxy for job-related KSAOs (Quinones et al., 1995; Tesluk & Jacobs, 1998), several study participants described their use of managerial work experience as a resume screening criterion in a

purely quantitative manner (i.e., simply screening based on the number of years of experience on the resume). While work experience exhibits a medium effect size on job performance when experience is less than three years, its predictive power diminishes (to a small effect size) when experience is 12 years or greater (McDaniel et al., 1988). As such, the use of previous managerial experience as the sole resume screening criterion would be inappropriate for very experienced applicants, including managerial job applicants.

*Recommendation for Finding 1.* Organizations that develop job postings containing minimum work experience requirements for experienced applicants (e.g., 10 years of progressive managerial experience) should train HR personnel from over-interpreting the requirement as a purely quantitative measure. Research suggests that HR professionals spend less than three minutes when reviewing applicant resumes (Martin-Lacroux & Lacroux, 2017). As such, HR professionals are likely to be making quick applicant elimination decisions based on purely quantitative measures of work experience. This practice likely results in the elimination of otherwise qualified applicants who would perform well in the position (i.e., Type I errors).

*Finding 2. The diversity of resume screening paradigms and applicant elimination standards utilized by HR professionals threatens its validity as an appropriate selection method for managerial job applicants.*

Study participants described a diversity of resume screening paradigms, applicant elimination standards, and assessment criteria for managerial job applicants in their interviews. The lack of consistency among HR professionals in resume screening indicates that a variety of criteria are being used to assess managerial applicants, a range

of underlying attributes are being inferred about them, and different perspectives on the predicted outcome (i.e., future job performance) exist. Consequently, both the independent variables (resume screening criteria) and dependent variable (future job performance) are different in terms of definitions and measurement among HR personnel. One might reasonably conclude that these differences are attributable to variations associated with organizational standards and norms or position descriptions. However, a significant number of study participants utilize elimination criteria that are not sourced from the organization nor the position description: they develop these criteria based on their personal experience

*Conclusion for Finding 2.* The uses of idiosyncratic criteria and paradigms by HR professionals in the resume screening sub-process for managerial job applicants likely result in eliminating qualified applicants from hiring pools and hiring unqualified applicants (Russell, 2007). Several of the “self-developed” criteria outlined above, while they often demonstrate face validity, lack support in the body of research as valid predictors of job performance (e.g., industry work experience, job stability, resume presentation; Schmidt & Hunter, 1986; Schmitt et al., 2003). Moreover, the limited research conducted on resume screening has not examined the validity of this selection method against job performance criteria (Russell, 2007). Rather, the extant research has been primarily focused on the relationships between biodata elements and variables that predict job performance for recent or impending college graduates (e.g., GCA, various forms of fit, personality factors, and hireability judgments). In order for this selection method to be defensible in practice, there must be scientific evidence to support its use for the population of applicants being assessed (e.g., managerial job applicants). Simply

stated, “When we say something is valid, we make a judgement about the extent to which relevant evidence supports that inference as being true or correct” (Shadish, Cook, & Campbell, 2002, p. 34). In this case, we have little research to support resume screening as a valid selection method (Robertson & Smith, 2001; Russell, 2007), particularly for managerial job applicants (Breugh, 2013; Cole et al., 2004; Rynes et al., 1997; Tsai et al., 2011).

*Recommendation for Finding 2.* Organizations in the United States should pursue alternatives to the use of resume screening as a selection method for managerial job applicants. Given the lack of generalizable research to validate its use coupled with the diversity of applications documented in this study, organizations would be prudent to move away from the method. While technology platforms in selection that are supported by machine learning and artificial intelligence may provide long-term alternatives to the current state of resume screening, near-term measures may also be taken by organizations. First, the use of HRIS to perform basic item-based pre-screening is already possible and in use in many organizations (Dickter, Jockin, & Delany, 2017; Society of Human Resource Management, 2018). In this scenario, items (i.e., questions) or short assessments are developed for a position and used to screen out applicants who do not meet minimum qualifications (e.g., authorized to work in the United States). This use of HRIS would likely result in greater levels of consistency, process efficiency, and resource minimization when screening managerial job applicants.

Organizations should also consider using HRIS to move toward electronic application blanks to induct managerial job applicants into the hiring pool rather than using traditional resume screening practices. While this selection method may result in

diminished applicant response levels or applicant withdrawals (Dickter et al., 2017; Ryan, 2016), it also provides a basis for a more structured and consistent approach to screening applicants. This approach would likely minimize the impacts of biases present among HR professionals when managerial applicant resumes are screened (e.g., resume presentation issues).

*Finding 3. HR personnel are not trained by their organizations to perform resume screening effectively.*

Only two of the 12 study participants indicated that they received training within their current organizations on resume screening. Thus, many study participants rely on their work experience (within the organization and otherwise) and education as the basis of their perspectives and approaches to resume screening. When participants described their past experiences in learning how to screen resumes, they typically conveyed that they were taught the procedure on the job in their first HR position. The lack of consistent organizational training on resume screening purposes, norms, and intended outcomes results in HR professionals developing personal approaches and criteria for resume screening.

*Conclusion for Finding 3.* The lack of training of HR personnel on the objectives, criteria, and intended outcomes of resume screening results in the adoption of highly individualized approaches to resume screening. Such individualized approaches to resume screening are likely to result in the following:

- Use of resume screening paradigms and related criteria by HR personnel that are not in alignment with the goals and objectives of the organization;
- Use of resume screening criteria that are not scientifically validated;

- Elimination of applicants due to individual bias that would perform well in the position;
- Disparate treatment of applicants during the hiring process (when practices are examined across the organization); and
- Hiring practices that would be indefensible in litigation against the organization.

In summary, the lack of training of HR personnel on resume screening within organizations may result in increased costs to the organization from recruiting costs (e.g., identifying more applicants) to litigation/settlement costs.

*Recommendation for Finding 3.* Organizations that continue to use resume screening as a key selection method should develop and conduct training of HR professionals and others (e.g., hiring managers) responsible for performing resume screening during the hiring process. The training should provide specific guidance on the organization's purpose, approach, and intended outcomes for resume screening. Exercises and case scenarios would probably be a useful component of the training to allow resume screeners to "learn by doing" and review scenarios that demonstrate poor decision-making. The core objectives of such training should be to develop knowledge among resume screeners of the organization's expectations and assist them in understanding the negative consequences of permitting personal bias to influence organizational practices.

*Finding 4.* Applicant tracking systems are not used to eliminate managerial job applicants during the resume or application screening sub-process.

Study participants described their organizations' use of ATS or HRIS as the central system that supports all activities associated with the hiring process for

managerial job applicants. In several cases, participants mentioned that pre-screening questions were used in online applications within these systems; however, they also stated that all resumes/applications were screened regardless of the applicants' responses to these questions. This organizational practice was based on concerns related to EEOC regulatory compliance (that prohibits disparate treatment of protected classes of applicants).

*Conclusion for Finding 4.* The results of this study revealed that HR personnel may review all managerial applicant resumes, even when an applicant's answers to ATS/HRIS screening questions indicated that the applicant may not have met the requirements for the position (e.g., not authorized to work in the United States). This empirical finding is not consistent with assertions in the popular business press that conclude that many applicants are "screened out" by ATS/HRIS (Ryan, 2016; Weber, 2012).

*Recommendation for Finding 4.* Researchers should continue to focus on empirical practitioner-focused research that seeks to establish benchmarks and identify trends or problems in the use of ATS and HRIS. A considerable amount of research over the past 15 years has been dedicated to the growing use of HRIS to automate, support and improve HR processes, service levels, and results (Dickter et al., 2017; Stone, Deadrick, Lukaszewski, & Johnson, 2015). For example, researchers have provided useful frameworks and empirical evidence on the use of the HRIS recruiting (eRecruiting), selection (eSelection), and applicant testing applications (eTesting; Stone, et al., 2015). As a result, several practices related to the use of HRIS by employers have been deemed problematic or poorly considered during system adoption: namely the use of key word



searches in resume screening (Mohamed et al., 2002) and the use of illegal or non-job-related pre-screening questions (Wallace, Tye, & Vadanovich, 2000). Similar research on employers' uses of HRIS to perform applicant screening and related best practices would provide useful information that could be used by employers to improve the effectiveness of eSelection.

#### Recommendations for Future Research

The results of this study indicate that banking and financial services organizations (represented by the study participants) may be lessening their reliance on traditional resume screening during the hiring process. Contemporary ATS and HRIS provide functionality for the development of online application blanks that provide more comparable data across job applicants. Given the lack of research that supports resume screening as a valid selection method, the researcher views this trend as a positive development within the selection domain.

While large organizations in the United States may be pursuing alternatives to traditional resume screening, middle market and small businesses will likely continue their reliance on resume screening as an integral part of their hiring processes. As such, future research that might provide additional insight into resume screening has value. Based on the results and experience of conducting this study, the researcher offers the following recommendations.

1. The research domain, and ultimately employers, would benefit from additional qualitative research studies on resume screening and other selection methods used when hiring experienced job applicants. This study is essentially a first step in understanding the hiring process for experienced

applicants; however, the study findings may not hold true in other settings or industries. Consequently, additional research is needed in other industries, particularly in industries where innovation is valued (e.g., large technology companies).

2. Researchers should approach the collection of data on the resume hiring sub-processes and other hiring activities with skepticism. This study found that some HR personnel espouse a particular paradigm for resume screening (e.g., evaluation based on minimum qualifications) only to contradict that paradigm in subsequent examples. Cole et al. (2007) identified a similar occurrence in their research on resume screening wherein recruiters espoused views did not match their actual practices. As such, future researchers should develop interview protocols or survey instruments that utilize cross-checks to mitigate the risks of spurious data collection.
3. Researchers should examine variable interactions when investigating the relationships between resume biodata elements and hireability or other dependent variables, particularly for experienced job applicants. This study found that HR personnel tend to examine resume biodata elements and make related applicant inferences based on several elements or criteria in combination when screening managerial job applicants. Thus, studies that examine variable interactions might prove useful in “unlocking the black box” of resume screening for experienced job applicants.

While resume screening continues to be an integral part of many organizations' hiring processes, little scientific evidence supports its use as a valid predictor of job

performance. Ultimately studies that utilize large longitudinal data sets that are presently being developed in HRIS would provide the best opportunities for prospective selection method research. However, in the near future, additional formative research on resume screening is warranted to explicate current theory and identify applicant attributes and evaluation criteria that are used in practice, particularly for experienced job applicants.

### Discussion

Many organizations in the United States will continue to utilize resume screening as a key component of their hiring processes for a variety of job groups: it's viewed as simple, inexpensive, and efficient (Cable & Gilovich, 1998; Cole, Feild, & Giles, 2003a). Further, the widespread use of resume screening is unlikely to diminish significantly even in the face of countervailing scientific evidence. A number of scholars have noted the durable nature of organizational hiring practices that are refuted by robust research evidence (Highhouse, 2008; Rynes et al., 2002, 2007, 2012). When it comes to the prediction of job performance or other human behaviors, individuals often reject the notion that they may be biased, unable to accurately predict future behavior, or that scientific knowledge may be leveraged to improve their decision-making (Highhouse, 2008; Lodato, Highhouse, & Brooks, 2010). Simply stated, many people believe that they're "a really good judge of people" and that their insights and judgments cannot be replicated or improved through scientific assessments.

This deflating depiction of organizational hiring practices in the United States is balanced by a trend toward the implementation of robust HRIS that may be used to systematize and improve the consistency of many HR processes including the hiring process. In addition to the automation benefits of such systems, HRIS can and are being

used by organizations in the United States to move away from the practice of resume screening and toward the use of screening questions and application blanks. Utilization of HRIS functionalities for this purpose has the propensity to reduce the negative impacts of individual bias and idiosyncratic evaluation paradigms associated with resume screening, as documented in this study.

Organizations that continue the use of resume screening within hiring processes should define the purpose and intended outcomes of resume screening and its relationship to other hiring process activities (e.g., testing, screening interviews, face-to-face interviews, etc.). Such a rationalization of the resume sub-process should answer the following questions:

- Why is resume screening an integral part of our hiring process?
- What applicant attributes may be reasonably assessed from biodata on the resume (e.g., that the applicant has an associate degree)?
- What applicant attributes are infeasible to assess based on biodata on the resume (e.g., personality, cognitive ability)?
- What activities during the hiring process are used to assess the presence or absence of KSAOs that cannot be assessed from a review of an applicant's resume?

Once these questions are answered and documented, organizations should train both HR personnel and hiring managers on these standards and hold them accountable for their application. Such investments would reduce overall hiring risks including the risks of *bad hires* and litigation.

At a broad level, the results of this study reveal a problem in the hiring process for managerial talent: within the human capital, OB/OD, and related domains: we still don't know how to adequately assess experienced applicants during the hiring process. In the published research, there is little to guide practitioners. In the practitioner arena, resources are expended to create competency models that aren't or can't reasonably be used to guide hiring processes and criteria. The resulting hiring practices in organizations (at least as demonstrated in this study) appear somewhat irrational, full of personal bias, and indefensible. This gap in HR processes should be recognized and taken seriously in both the practitioner and research communities.

### Conclusion

Chapter V provides a summary of the study results, related findings and recommendations, and recommendations for future research. Given the gap in research on hiring processes for experienced job applicants, this study focused on describing the resume screening sub-process, its relationship to other hiring process activities, and the evaluation criteria utilized by HR personnel who perform resume screening for managerial job applicants. The study used the descriptive phenomenological method to collect and analyze study data and develop related results and findings. This method provided a pathway to understanding the lived experiences of study participants and arriving at the "essence" of those experiences from an empirical perspective (Giorgi, 1985, 2009). The study results provide the first formative description of the resume screening sub-process and related features used for managerial job applicants in the I/O psychology or HR literature.

The study findings create new knowledge in the selection research domain. First, the findings provide a formative description of the resume screening sub-process, its features, and context within the overall hiring process for managerial job applicants. Second, the findings identify the resume screening criteria used by HR personnel when evaluating managerial job applicants and their relative importances and sources. Finally, the study provides insights on the resume screening sub-process and related influencers that may be used as a basis for future research.

The results of this study provide a formative understanding of the issues that arise from the use of resume screening in the hiring process for managers. First, the resume screening sub-processes used by HR personnel to evaluate managerial job applicants sometimes appear to be a conglomeration of individual philosophies, perspectives and decision-making paradigms that introduce bias into the hiring process. In contrast, some organizations have defined and consistently utilize a minimum qualifications paradigm for resume screening. While this paradigm has its faults, it provides a consistent basis for applicant evaluation. Other resume screening paradigms adopted by HR personnel in this study are problematic and risky. The HR professional can and should do better than the idiosyncratic and inconsistent approaches to resume screening that this study documented.

This study also documents a very strong preference among employers to evaluate managerial job applicants, at least within the resume screening sub-process, based primarily on applicants' previous work experiences. This organizational practice suggests that the knowledge and skills to perform managerial jobs well are acquired by applicants through their previous work experiences and that such skills and knowledge

are portable from one organization to another. Moreover, this practice suggests that other applicant attributes (e.g., educational attainment) have little importance to employers when evaluating the resumes of managerial job applicants. While GCA is a broadly used criterion when evaluating the resumes of recent or impending college graduates (Chen et al., 2011; Cole et al., 2003a, 2003b), it appears to be unimportant when managerial applicant resumes are screened. However, the correlation between GCA and job performance is much more significant than the correlation between work experience and job performance, particularly for very experienced individuals. The inability of the resume screening sub-process to utilize GCA as an applicant evaluation criterion is another shortcoming of this selection method. Employers who adopt the recommendations made in this chapter may minimize the risks associated with resume screening including *bad hires*. However, until organizations truly understand and develop processes to assess the critical KSAOs of managerial talent in their organizations, the implementation of the recommendations made in this chapter will be little more than a “stop gap” solution. Given the importance of managerial performance to organizational success, employers that improve managerial hiring processes (i.e., increasing the quality of new managers in their organizations) have greater potential for creating sustainable competitive advantage and improving financial results and overall value creation.

## APPENDIX A - Study Participant Screening Questions

1. Do you currently work in the banking and financial services industry? (If no, discontinue interview)
2. What is your current position title?
3. How long have you been in this position or a similar position within your organization?
4. Are you involved in the screening and evaluation of applicants during the hiring process? If so, how? (If no, discontinue interview)
5. Within the past year, have you screened applicant resumes for managerial positions within your organization? (If no, discontinue interview)
6. Could you give me an example or two of the types of managerial positions for which you screened applicants based on their resumes?



## APPENDIX B - Sample Invitation Memo to Participate in Study

Date

Dear Ms. (Potential Participant Name):

I am a doctoral student at The University of Southern Mississippi in the Human Capital Development program. I am in the last phase of the program – completion of my dissertation research and need participants in my study, *Screening the Managerial Applicant: A Descriptive Phenomenological Study of Resume Review and Evaluation*.

My former colleague, (insert name of contact), has recommended you as a potential participant in the study. I know your time is valuable, but I only need about 90 minutes of it for an initial introductory call and an actual interview call. I am collecting all the data for the study virtually so you don't ever have to leave your office or plan a face-to-face interview.

The study will focus on the processes used by employers to screen the resumes of external applicants for managerial positions. This area of the HR practice has received very little attention in research and practitioner publications; although, it is used by employers in many selection processes. So my central research question is: What process is used by HR personnel when screening the resumes of managerial applicants?

I hope that you will consent to be a participant in this study. I can see the light at the end of the tunnel in my PhD pursuit, but I need your help to get there. Please let me know if you can make the time to participate. Once you've said "Yes", I would like to schedule a quick 15 minute telephone call to provide information on the study and schedule a subsequent interview.

Thank you in advance for your time.

Best regards,

Greg Higgins  
University of Southern Mississippi  
(telephone number)  
(e-mail address)

## APPENDIX C - Introductory Telephone Script

Good morning/afternoon, this is Greg Higgins calling. Is this (study participant name)?  
I don't want to take up much of your time, but I would like to briefly cover three topics with you if I may. Is that OK?

1. First, I would like to confirm that you are willing to participate in my study. Just to refresh your memory, this research is being conducted in order to complete my dissertation in Human Capital Development at The University of Southern Mississippi. So, if you are willing to participate, let's continue.

Great, may I ask you a few questions to ensure that you're a good match for the study based on your experience?

Researcher now asks *Study Participant Screening Questions* (see Appendix A).

Note to researcher: If the potential participant does not affirmatively answer questions three and four of the screening questions, she does not qualify for inclusion in the study.

- Thank the potential participant for their time;
- Ask individual if they could provide other potential participants in their organization who *do* screen the resumes of managerial applicants;
- Conclude call.

Okay, it sounds like you meet the criteria for inclusion in my study, and that's good.

2. So, the second topic that I would like to discuss with you is informed consent for you to participate in the study. The purpose of the study is to gain an understanding of the processes used by employers to screen the resumes of applicants for managerial positions during the hiring process. I want to make sure that you understand and consent to your participation in the study. So, I will be sending you a brief on the

study that includes: (a) the purpose of the study, (b) study benefits and risks, (c) data collection and management procedures, (d) confidentiality, and (e) assurances (see Appendix F). I would request that you review this brief and then sign and date the *Informed Consent Form* and send it back to me (see Appendix G). You can either scan it and e-mail it to me, or just take a picture of it with your phone and text it to me. My cell phone number is in the e-mail I sent earlier (Appendix B).

3. My third topic is the actual interview. I want to give you some information on the interview that I would like to conduct with you. I would like to schedule an hour with you sometime in the next few weeks to conduct the interview. We can conduct the interview using GoToMeeting or Skype – whichever you prefer. I will be taking notes on my end as well as recording the interview so that it may be transcribed later for analysis. I want to ensure you that your privacy will be protected. Neither the recording of the interview nor the transcript will use your name or company name. For example, when I ask you a question during the interview, I will be phrasing it like “In your organization” rather than using the name of your company.

I want to make sure that you’re comfortable with that. Do you have any questions or concerns that I can address?

Before we start the actual interview, I will have eight standard demographic questions to ask you. I need this data to report on the study participants as a group, but none of this information will be linked to you individually. In fact, I will input your data into a spreadsheet that doesn’t even have your name or company name on it. Once we get those questions completed, I will start the recording, and we will progress with the interview.

Does that sound OK?

Once the actual data collection interview is completed, I will be sending the recording to a third-party service for transcription. When the transcription is completed, I will send it to you in an e-mail so that you can review it and make any corrections.

So, can we review our calendars and find a good tentative date and time to conduct the interview over the next couple of weeks? My schedule is pretty flexible (researcher and participant coordinate interview date and time).

Great, I will send you an invitation later today via e-mail including the informed consent brief and the form I need you to sign. Please return the signed version to me before our interview. I will send you a reminder via e-mail a few days before our scheduled interview.

Do you have any other questions or concerns that I can address before our interview?

OK, I'm really looking forward to our interview. Thank you so much for your time.

APPENDIX D - Informed Consent Brief

***SCREENING THE MANAGERIAL APPLICANT: A PHENOMENOLOGICAL  
STUDY OF RESUME REVIEW AND EVALUATION***

**Purpose:** to understand the resume screening process used by employers when hiring applicants for managerial jobs including:

- Fit with other selection methods used in the hiring process;
- Use of applicant tracking or e-recruiting systems;
- Criteria used in process;
- Relative importance of each criteria;
- Sources of criteria.

**Benefits:** Study participants will be offered a copy of an Executive Summary of the study and its results in gratitude for their participation.

**Risks:** There are minimal risks associated with this study. Two risks identified by the researcher include: (a) a security breach in which a third-party gains access to the researcher's laptop computer, and (b) an e-mail breach wherein a third-party gains access to a participant's recorded or transcribed interview. Both of these potential breaches have been addressed in the data collection/management procedures as follows:

- No records that link the identity of a study participant to specific demographic data or interview recording or transcript will be maintained on the researcher's laptop computer. Data collected from participants during the study will be maintained using a participant number that links the study participant with his/her name and organization; however, the key for this linkage will not exist in any form other than a single sheet of paper maintained at the researcher's residence.

- Recordings and related transcripts of participant interviews will not include data that directly links the participant to a specific identity or company. Interview questions will be asked using non-specific language (e.g., at your company) to minimize the inadvertent inclusion of any personally-identifiable information in recordings or transcripts. When recorded interview files are transmitted to/from the third party transcription service, they will not contain the participant's name or company name.

### **Data Collection & Management Procedures:**

Demographic data on study participants will be collected at the beginning of each interview. This data will be entered into a spreadsheet by the researcher; however, this portion of the interview will not be recorded. Each participant will be assigned a participant number that will be used to link his/her data to their underlying identity. The key for these identifiers will not exist in electronic form.

All participant data will be maintained on the researcher's laptop computer and an external hard drive (for backup purposes) during the study. Recorded interview files will be sent via e-mail to a third party for transcription.

At the conclusion of the study, all participant data will be moved to an external hard drive for storage. The hardcopy key will be destroyed, and all e-mail communications with the third party transcription service and with study participants will be deleted from the researcher's e-mail account.

**Confidentiality:** Each participant will be assigned a participant number once they are accepted into the study. As outlined above, this number will be used to link the participant to data collected from them. One of the objectives of this study is to protect

any and all personal or referential data provided by participants during the course of the study. Any breach in these data collection and management procedures will be reported to the University of Southern Mississippi's IRB Office no later than 10 days following the incident.

**Assurances:** Study participants may withdraw from the study at any time. This study has been reviewed and authorized by the Human Subject Protection Review Committee of the University of Southern Mississippi to ensure its compliance with federal regulations concerning the use of human subjects in research. Any questions concerning the rights of research participants should be directed to USM's IRB at (601) 266-6820. Any questions concerning this study should be directed to Greg Higgins at (phone number).



APPENDIX E - Informed Consent Form to Participate in Study

THE UNIVERSITY OF SOUTHERN MISSISSIPPI

AUTHORIZATION TO PARTICIPATE IN RESEARCH PROJECT

Participant's Name \_\_\_\_\_

Consent is given to participate in research project entitled *Screening the Managerial*

*Applicant: A Phenomenological Study of Resume Review and Evaluation*. All

procedures to be followed were explained by Greg Higgins in an initial telephone call

with the participant. The study purpose, benefits and risks, data collection and

management procedures, confidentiality, and assurances were communicated to the

participant in an *Informed Consent Brief*. Participants are encouraged to ask questions

about research protocol and may withdraw from the study at any time. All information

gathered from the interview process is confidential. Participants will be assigned a

participant number not linked to any personal identifiers. All information gathered will

be linked to the participant number. Only the researcher will have access to data gathered

for the purpose of completing doctoral research requirements. Please contact Greg

Higgins with any questions concerning this research project.

\_\_\_\_\_

Signature of participant

Date

\_\_\_\_\_

Signature of Researcher

Date

APPENDIX F - Study Participant Demographic Data Collection Instrument

1. Participant Code (controlled by researcher)
2. Gender:  
 Male     Female
3. Age:  
 Under 25     25-35     36-45     46-55     56-65     Over 65
4. Race/Ethnicity:  
 Caucasian     African-American     Hispanic     Asian     Other
5. Job Tenure (number of years):
6. Organizational Tenure (number of years):
7. Number of Employees in Organization (approximation):

## APPENDIX G - Interview Guide

Begin interview with collecting demographic data using the *Participant Demographic Data Collection* items (see Appendix F).

- Note to researcher: input responses to participant demographic items on spreadsheet under the participant's code. Do not record this portion of the interview.
- Once this portion of the interview is completed, inform participant that you will initiate the recording and proceed with the questions below.
- Before recording, remind the participant that you will be using phrasing like “in your organization” rather than using their specific company name. Suggest that they use this type of general language to avoid using their company name during the recording.

Initiate recording: Confirm with participant that they are an HR professional who is involved in the resume screening process for managerial applicants. Further, confirm that they work for an organization in the banking and financial services industry. Finally, confirm that they reviewed the informed consent materials that were sent and that they have consented to participate in the study.

Explain to participant that you will now begin the interview for the purpose of study data collection. First, ask the participant to recall a time recently when she screened the resumes of applicants for a managerial position in her company. Ask the participant to think about this experience and similar ones as she answers the following questions.

1. Describe the process you use when you screen the resumes of managerial applicants.

- a. Tell me more about the specific position that you were screening resumes for.  
How does this position differ from other managerial positions for which you screen resumes?
  - b. When does the screening process begin? For example, does the job posting have to be closed and all resumes received before you begin your screening process?
  - c. Describe what are you examining or analyzing on the resume when you conduct your screening?
  - d. Describe your decision-making process when you eliminate applicants from the pool.
  - e. Tell me about the most important things you are looking for on the resume?
  - f. Why are those particular elements important to you?
2. When you go through the resume screening process, are you examining both internal and external applicants? Tell me more about that. How do the two candidate pools get merged in the process?
  3. How is the resume screening process integrated into the overall hiring process?
  4. How are information systems, such as applicant tracking systems, utilized in the resume screening process?
  5. What screening criteria are used by the system?
  6. How did you learn how to screen resumes?
    - a. Does your company conduct training on this process? If so, tell me more about the training.
    - b. Where do the criteria that you use in the process come from?

7. Is the screening process that you use different or the same for other types of jobs?

How is it different?

8. Are there other aspects of the resume screening process that we haven't discussed? If

so, what are they?

APPENDIX H - Interview Transcript Validation E-mail

To: Study participant

From: Greg Higgins

Subject: Review and Validation of Interview Transcript

Date:

Dear (Study Participant name):

Thank you again for your participation in my study on the resume screening process for managerial job applicants in the banking and financial services industry. I appreciate the time and attention that you have given me to date. As I mentioned in our interview, I would like you to review the interview transcript to ensure its completeness and accuracy before I move into the data analysis phase of the project.

The purpose of having your review your interview transcript is to ensure the accuracy of it before I move into the data analysis phase of the study. I would request that the primary focus of your review be ensuring the accuracy of diction (e.g., editing *annul* to *annual*) and the completeness of the transcript. If you believe, however, that the transcript does not reflect your experience in resume screening in some way, I would request that you provide that feedback to me as well including an explanation of how the transcript is deficient.

I have attached the interview transcript for your review. Please review it and let me know if you observe any errors, omissions, or other issues. If you prefer, you can edit the transcript using MS Word (please use the review feature to mark your changes) or simply communicate any changes or issues to me in a return e-mail.

I request that you complete this task in the next week if possible. If you are unable to do so, please let me know. If I don't hear from you within the next week, I will send you a friendly reminder. If you have any questions or issues, please feel free to call me at (phone number).

Thank you in advance for your attention to this task.

Sincerely,

Greg Higgins

Phone number

## APPENDIX I - IRB Approval Letter



### **INSTITUTIONAL REVIEW BOARD**

118 College Drive #5147 | Hattiesburg, MS 39406-0001

Phone: 601.266.5997 | Fax: 601.266.4377 | [www.usm.edu/research/institutional\\_review\\_board](http://www.usm.edu/research/institutional_review_board)

### **NOTICE OF COMMITTEE ACTION**

The project has been reviewed by The University of Southern Mississippi Institutional Review Board in accordance with Federal Drug Administration regulations (21 CFR 26, 111), Department of Health and Human Services (45 CFR Part 46), and university guidelines to ensure adherence to the following criteria:

- The risks to subjects are minimized.
- The risks to subjects are reasonable in relation to the anticipated benefits.
- The selection of subjects is equitable.
- Informed consent is adequate and appropriately documented.
- Where appropriate, the research plan makes adequate provisions for monitoring the data collected to ensure the safety of the subjects.
- Where appropriate, there are adequate provisions to protect the privacy of subjects and to maintain the confidentiality of all data.
- Appropriate additional safeguards have been included to protect vulnerable subjects.
- Any unanticipated, serious, or continuing problems encountered regarding risks to subjects must be reported immediately, but not later than 10 days following the event. This should be reported to the IRB Office via the "Adverse Effect Report Form".
- If approved, the maximum period of approval is limited to twelve months.  
Projects that exceed this period must submit an application for renewal or continuation.

PROTOCOL NUMBER: 15091705

PROJECT TITLE: Screening the Managerial Applicant: A Descriptive Phenomenological Study of Resume Review and Evaluation

PROJECT TYPE: New Project

RESEARCHER(S): Gregory E. Higgins

COLLEGE/DIVISION: College of Science and Technology

DEPARTMENT: Human Capital Development

FUNDING AGENCY/SPONSOR: N/A

IRB COMMITTEE ACTION: Exempt Review Approval

PERIOD OF APPROVAL: 10/30/2015 to 10/29/2016

**Lawrence A. Hosman, Ph.D.**

**Institutional Review Board**





THE UNIVERSITY OF  
**SOUTHERN MISSISSIPPI**

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**INSTITUTIONAL REVIEW BOARD**

118 College Drive #5147 | Hattiesburg, MS 39406-0001

Phone: 601.266.5997 | Fax: 601.266.4377 | [www.usm.edu/research/institutional.review.board](http://www.usm.edu/research/institutional.review.board)

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The project has been reviewed by The University of Southern Mississippi Institutional Review Board in accordance with Federal Drug Administration regulations (21 CFR 26, 111), Department of Health and Human Services (45 CFR Part 46), and university guidelines to ensure adherence to the following criteria:

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- If approved, the maximum period of approval is limited to twelve months.  
Projects that exceed this period must submit an application for renewal or continuation.

PROTOCOL NUMBER: R15091705

PROJECT TITLE: Screening the Managerial Applicant: A Descriptive Phenomenological Study of Resume Review and Evaluation

PROJECT TYPE: Renewal of a Previously Approved Project

RESEARCHER(S): Gregory E. Higgins

COLLEGE/DIVISION: College of Science and Technology

DEPARTMENT: Human Capital Development

FUNDING AGENCY/SPONSOR: N/A

IRB COMMITTEE ACTION: Exempt Review Approval

PERIOD OF APPROVAL: 10/30/2016 to 10/29/2017

**Lawrence A. Hosman, Ph.D.**

**Institutional Review Board**

APPENDIX J – Sample Transformed Interview Transcript

| <b>Questions</b>  | <b>Subject 2B Responses</b>   | <b>Transformation</b>   | <b>Meaning Unit Reference Nbr</b> |
|---|---|---|-----------------------------------|
| <p>Please describe the process that you use when you screen the resumes of managerial applicants.</p> | <p>That particular process really kind of depends on the type of manager we are looking for.</p>  | <p>2B states that the resume screening process depends on the "type" of manager being hired.</p>  | <p>2B-1</p>                       |
|   | <p>If it's a branch manager versus a business banker, then you would kind of consider the job competency, and you would review the resume looking for the details of that job competency. For example, if it's sales, that the job requires this person to be a sales person,</p> | <p>2B states that an applicant's resume is reviewed for evidence of previous work experience that matches the competencies of the position.</p> | <p>2B-2</p>                       |

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|  | <p>then you're looking for that work experience on the resume.</p>   |  |             |
|  | <p>A couple of things, you're looking to see if it's well written and organized, you're looking to see what type of managerial experience they have, what are the details of that experience, how many direct reports of that information is listed on their resume, what leadership experience they have, the educational background, the organizations that the applicant has worked for, recognizing that the culture of some organizations is going to effect the type of managerial experience they have.</p> | <p>2B states that a managerial applicant's resume is reviewed based on several criteria including:</p> <ol style="list-style-type: none"> <li>1) Presentation (organized and well-written);</li> <li>2) Managerial experience and related details (such as number of direct reports);</li> <li>3) Leadership experience;</li> <li>4) Education;</li> <li>5) Organizations worked for (cultural fit). 2B implies that PO inferences may be made based on the organizations the applicant has worked for in the past.</li> </ol> | <p>2B-3</p> |

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|  | <p>Again, we use the service to gap in employment and then if there's been any demotions in their manage experience saying if they went from a mid-level manager ... if they went from an executive leadership managerial role to a mid -level manager, that would be a demotion, and cause some concern.</p> | <p>2B states that gaps in employment and demotions are considered in evaluating an applicant's resume. These factors would be of concern to the HR professional based on inferences (underlying attribute undefined).</p> | <p>2B-4</p> |
|  | <p>The other process we use is the informant testing. If there were any case studies, or any personality testing, and deductive reasoning that we would give the applicant to add to that resume for instance.</p>  | <p>2B states that testing is used to assess personality and other traits (e.g., deductive reasoning) during the hiring process.</p>   | <p>2B-5</p> |

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| <p>Tell me about how the process begins. For example, does the job posting have to be closed to initiate the resume screening process?</p> | <p>We start as the resumes come in. We have an electronic applicant tracking software called, Taleo. Applicants will apply to a requisition and on that requisition we are able to go in and review those resumes, according to the requisition information. As a resume comes in, I receive an email, I log into Taleo, I review the resume.</p> | <p>2B states that applicant resumes are screened as they come in during the application period. The organization's ATS is used to facilitate this process.</p>  | <p>2B-6</p> |
|  | <p>At that point, if that applicant has what we're looking for in the resume then they move to testing, which is the second step in the screening process. If the testing is successful then they move to interviewing phase. Which would be a series for managerial candidate, which would be a series of three interviews.</p>                  | <p>2B states that following resume screening, the following hiring activities are conducted:</p> <ol style="list-style-type: none"> <li>1) Testing,</li> <li>2) Interviews,</li> <li>3) Background check,</li> <li>4) Offer of employment.</li> </ol> | <p>2B-7</p> |

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|   | <p>At the end of the interviewing process then the background check begins and at the end of the background check an offer is extended.</p>   |   |             |
| <p>So when you have resumes in the applicant tracking system, how do you pull the applicant pool?</p> | <p>Well basically the applicant tracking system, the resumes are always attached to a job. If there is just a general profile, meaning it's not attached to a job, those resumes are not seen. Unless, I'm conducting a resume search, which in most cases is not relevant because for any managerial position there could be 50 to 100 applicants. Basically, when I access that tracking system I'm going directly to the requisition of, example Branch Manager, and</p> | <p>2B states that applicant resumes are always associated with a specific position. As such, "searches" of applicant resumes in the ATS are not performed to screen applicants.</p> | <p>2B-8</p> |

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|  | <p>I'm reviewing all the resumes for the individuals who have applied.</p>  |  |             |
|  | <p>Now let's back up for a minute, let's say I wanted to conduct a resume search using let's say LinkedIn. Then I would log into LinkedIn, and then I would use keywords and I would say "Branch Manager Financial Services Industry". I would conduct a search within my zip code for a 100 miles. Then as those resumes are listed I would conduct a screening process to determine, if they have the basic set of skills we're needing according to the job.</p> | <p>2B states that LinkedIn searches are sometime conducted to identify potential applicants.</p> | <p>2B-9</p> |

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|   | <p>If I find candidates on LinkedIn that match what I'm looking for, then I would send an email and invite them to apply via the applicant tracking system, which would attach them to the requisition.</p> | <p>2B states that messages are sent to LinkedIn members to invite them to apply for a specific position in the organization's ATS.</p>   | <p>2B-10</p> |
| <p>So you're doing a recruiting piece on LinkedIn, and then follow through on that in the normal ATS process?</p> | <p>Absolutely</p>   | <p>2B confirms that recruiting for open positions is conducted in LinkedIn.</p>  | <p>2B-11</p> |
| <p>Tell me about the criteria you use when you're eliminating applicants from the</p>                             | <p>Okay, so let's take Branch Manager for instance. This particular financial industry, it's been hard for us to recruit sales people versus bankers. Banking we can train on, the</p>                      | <p>2B states that examining the resume for specific types of experience, such as business sales and management experience, is very important (and first in the screening process).</p> | <p>2B-12</p> |



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| <p>pool based on the resume screenings.</p> | <p>sales you cannot. That's something you either have or you don't. When you're reviewing resumes for a Branch Manager candidate, the first thing that I'm going to look for is their sales and management experience. When I say sales, I mean business to business sales and not necessarily retail sales</p> |   |              |
|   | <p>Any applicants that do not possess that type of skill, they're disqualified.</p>   | <p>2B states that based on a lack of experience alone, an applicant will be eliminated from the applicant pool.</p> | <p>2B-13</p> |

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|  | <p>For the applicants that actually have that experience, then the second experience that I'm going to look for is banking. They'll have the business to business sales. Let's say I have two applicants; one has business to business sales and banking, the other has business to business sales and, let's say, insurance. Well naturally I'm going to lean towards the one that has business to business sales and the banking, and the insurance one is disqualified. The banking would be more qualified.</p> | <p>2B states that when comparing applicants, those that have B2B and banking experience will go through in the process (secondary criteria).</p>      | <p>2B-14</p> |
|  | <p>That's another step. A third step, let's say both the applicants have business to business sales, and they have banking, then I'm looking at years of service, how long they've been in</p>  | <p>2B states that duration of experience, education or certification in banking are used as a tertiary criteria for evaluating applicant resumes.</p> | <p>2B-15</p> |

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|  | <p>their current position as a manager, how long they've worked in a bank, how long they've worked in sales. A second qualifier would be the education background, possessing a bachelor's degree or master's degree. Another qualifier if they've attended any school of banking and got a specialized certification in the field of banking.</p> |  |              |
|  | <p>Another qualifier would be if they possess a license because various financial products you have to have a license. For instance insurance, there is an annuities license so if this candidate possesses a license that would be another qualifier.</p>   | <p>2B states that licensing is used as another criterion for evaluating applicant's resumes.</p> | <p>2B-16</p> |

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|  | <p>Because we have a sales culture another qualifier would be their community involvement because that would tell me that this person could network and they have a database of individuals that they network with. We would look for all that information on the resume and candidates that do not possess that information would be disqualified</p> | <p>2B states that community involvement is used as another criterion evaluating applicant's resumes.</p>   | <p>2B-17</p> |
| <p>So those particular elements, or qualifications, that are important to you are based on the position description?</p> | <p>Absolutely. Now in addition to a core, definitely the job competencies, you also want to keep in mind the culture of the organization and the culture of the team. The person has to be a good match personality wise, with the organization, with the team. Now that's not going to necessarily disqualify a candidate but</p>                     | <p>2B states that perceived cultural and team fit and personality are also important applicant attributes that are evaluated, but they are not used to eliminate applicants.</p> | <p>2B-18</p> |

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|  | <p>it's going to let you know what weaknesses you'll have with this candidate and what kind of training program you'll need should you hire this person to help bring them on board and more in line with the company approach.</p>  |  |              |
| <p>So, let's say they worked at Bank of America, and they are an incoming candidate to you. Are you assessing that cultural fit and drawing conclusions about what that person "Might be</p> | <p>Absolutely. Yes. We do that, you can't necessarily determine that from just looking at the resume. More of that information you are going to discover from the testing and the interview. We'll use a behavioral interviewing, here's a situation, tell me about a time when. You can really engage that type of information based on their responses and that helps you kind of determine what type of training you're going to need to bring this</p> | <p>2B states that cultural fit and personality are assessed during testing and interviews.</p> | <p>2B-19</p> |

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| <p>like, might perform like" based on the fact that they came from B of A?</p>   | <p>person more in line with your culture if it's not matching.</p> |  |              |
| <p>Okay so what I hear you saying is that the resume screening process determines who gets through that process and who gets eliminated from the pool, but it also</p> | <p>Absolutely.</p>   | <p>2B states that resume screening may also have impacts on assessment of testing expectations and interview topics.</p> | <p>2B-20</p> |

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| <p>has impact downstream on what we would expect in testing, the kinds of things we might focus on in the interview?</p>                |   |   |              |
| <p>When you're doing these screens of applicant resumes are you looking both at external candidates as well as internal candidates?</p> | <p>Yes we are but it is kind of a separate process, meaning when the position is posted, it's posted on both the internal and the external sites. Though we will not make any decisions or even review any resumes of external applicants until the internal applicants have had 7 days to be considered. Once that 7 day</p> | <p>2B states that the internal and external candidate pools are reviewed separately in the hiring process. Internal first, then external.</p> | <p>2B-21</p> |

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|  | time frame has expired then we will begin screening external applicants.  |  |       |
| Does that mean that the internal candidates have all been rejected or that they are kind of in the pool at this point? | Yes, they've been rejected. Once we pass that 7 days and now we're looking at externals, then that means that the internals have been rejected.   | 2B confirms that internal applicants are rejected before external applicants are considered. | 2B-21 |
|  | But it's all on the same requisition if that makes any sense. You might have 20 applicants and let's say out of the 20, 15 are internal and 5 that are external, and this is just hypothetically speaking. Then at the end of the 7 days you would have already | 2B confirms above.   | 2B-22 |



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|   | interviewed, screened and disqualified the 15<br>internals and now we're moving forward with<br>reviewing the 5 external. You would only<br>have 5 remaining applicants on that<br>requisition.   |  |       |
| How did you<br>personally learn how<br>to do resume<br>screening? | Through formal training. When I joined the<br>particular organization that I am referencing,<br>we actually went through corporate training on<br>first of all how to conduct resume searches<br>and secondly, how to actually screen for the<br>most qualified candidate based on the job. | 2B states that she received resume screening<br>training from the organization.  | 2B-23 |
| What is the purpose<br>of the training you<br>received?           | Of course, we have regulations, federal<br>regulations that govern recruiting practices,<br>such as Affirmative Action. You're trying to<br>make sure that there aren't any discriminatory  | 2B states that HR professional resume<br>screening also addressed Affirmative Action<br>and other non-discriminatory practices<br>consistent with EEOC guidelines. | 2B-24 |

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|  | <p>practices, especially being that this is an equal employment opportunity employer. You're making sure that your screening process is not discriminatory towards a protected classification so that's another thing that the training will address.</p>  |   |              |
| <p>Is your screening process for managerial applicants different from the process used for other job types – meaning non-managerial positions?</p> | <p>Very different because you're looking for a different type of applicant and so therefore the same things that you would look for in a manager candidate certainly you're not looking for with a teller. Again it's going to be heavily based on the job competency, the job description, what is it that the person is going to be expected to do, and so therefore your screening process is going to be based off</p> | <p>2B states that the resume screening process is very different for non-managerial applicants. This is due to differences in content based on position competencies - testing, job descriptions, etc. will be different.</p> | <p>2B-25</p> |

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|  | <p>of that. The employment testing would also be different, manager versus teller because your teller is a more technical applicant so your testing is going to be of a technical design to make sure they can balance and be accurate in their balancing of transactions.</p> |   |              |
|  | <p>Your managers' is more strategic. Your testing and your screening is going to be based on a more strategic process to make sure that this person is a strategic thinker versus a technical thinker.</p>   | <p>2B states that managerial hiring is based on strategic thinking vs technical thinking.</p> | <p>@b-26</p> |

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| <p>Are there other aspects of the resume screening process that we haven't discussed?</p> | <p>Basically your resume, and this is really a personal preference, so this probably would not be a practice that any other organization might use. This is what I use personally. I know what type of responsibility is going to come along with that managerial role, the resume tells me if this person is going to be a very lethargic manager. In the way that they have organized that resume. Are they trying to give me short, general responses or is it very detailed and very well organized. If it's not organized, and it's very short and brief answers: that might be a very laissez-faire based manager if that makes any sense.</p> | <p>2B admits that she uses resume organization and appearance to make attributions on a managerial applicants work style, work ethics, etc.</p> <p>2B is aware that her focus on the organization and appearance of the resume is not consistent with her own or other organizations norms in the hiring process.</p> | <p>2B-27</p> |
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| <p>So what you're saying is, it's not only the content but it's also the appearance and the organization of that resume that makes an impression on you, and you're drawing conclusions from that as well?</p> | <p>Absolutely. Absolutely. That tells you if you're going to get a hard worker or a very laissez-faire, hands off manager. That can be a great indicator.</p>                | <p>2B confirms that her personal biases enter into the hiring process through her attributions during the resume screening process.</p>                           | <p>2B-28</p> |
| <p>You've seen that kind of occurrence in your organization?</p>   | <p>You have to think about it. The resume is a selling tool. This is the one chance the applicant gets to sell themselves before they ever get to meet the employer. The</p> | <p>2B insists that her attributions from the resume screening process will be confirmed in the applicant's results from subsequent hiring process activities.</p> | <p>2B-29</p> |

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|  | <p>expectation is it's going to be the selling tool that that applicant has. If it's poorly written and poorly organized that tells you a lot about the applicant. If that's the case, you'll see that continue in the testing and the interview.</p>   |   |              |
| <p>This is based on your experience?</p> | <p>Yes.</p>   | <p>2B states that her practice of examining organization and appearance of resumes is based on her experience.</p>  | <p>2B-30</p> |
|  | <p>If it's a poorly written resume, you cannot let that disqualify your candidate. You're still looking for the job experience to make sure that if this candidate has what the requisition is stating that you'll need, then you want to be fair in still considering that person through the rest of the process. But keeping in mind</p> | <p>2B states that resume attributions are used by her to inform subsequent hiring activities such as interviewing (areas of focus); however, resume appearance does not impact elimination decisions during the resume screening process.</p> | <p>2B-31</p> |

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|  | <p>you're making sure that you're picking up on whether or not this candidate is going to be laissez-faire manager. You're addressing that in your interviewing questions so I want to be clear in making sure that doesn't disqualify them. That's just an indication that you might want to target more specifically in your interviewing processes.</p> |   |              |
|  | <p>I was going to say the reason why I say that is it takes a very special person to be a manager and they have to be able to deal with people. They have to be good communicators. They have to be good listeners. They have to be coaches. For the environment that I'm speaking of, for the financial institution that</p>                              | <p>2B justifies her resume attributions based on her assertion that managers are "very special people" that must be multi-skilled and highly effective in a broad number of capacities.</p> | <p>2B-32</p> |

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|  | <p>I'm speaking of, you don't want a micromanager. You don't want someone who's not going to develop their associates. You don't want someone who is all for self, and all of that can be determined through your screening process. If you have not properly screened that candidate, you're not going to get the best manager.</p> |  |  |
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| <p>Based on your screening and your formation of that applicant pool are you conveying information to other individuals who are going to be involved in the interview process about some of these potential hot button issues or perceptions you have of a candidate that we need to "dig into"</p> | <p>What I will do, because there's three interviews: one with HR, one with a hiring manager, and one with the mid-level manager that this branch manager would report to. I would not share it with the hiring manager, per say, but with the mid-level manager I might say "We've already interviewed this person and tested. Here are the results of the test, and here are the results of the other two interviews. Here are the consistencies."</p> | <p>2B states that she does not share her resume attributions with the hiring manager.</p> | <p>2B-33</p> |
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| <p>during the rest of the applicant evaluation process? Or those things you're then going to emphasize in the interview if you're interviewing that candidate</p> |  |  |              |
|   | <p>In your line of questioning you might want to kind of hone in on some of these consistencies to bring more detail or more clarity, or here's some hot buttons for you. I would not do that with the hiring manager because I would want that hiring manager to get their own perception of the candidate.</p> | <p>2B confirms that she does share her resume attributions and interview results with mid-level managers (the third interviewer in the process).</p> | <p>2B-34</p> |

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