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The Wiring Beneath the Work

The Birkman Method® in Executive Development: Interests, Needs, and Stress Behaviour as the First Step of the Infinitum Assessment Pathway

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Executive summary

Coaching engagements usually begin with behaviour: the leader's calendar, communication style, decision habits, and the feedback colleagues give. Behaviour is the visible fraction of a working life. Underneath it sit three quieter structures — what gives a person energy, what conditions that person needs from the people and setting around them, and the reactive pattern that appears when those conditions go unmet for long enough. The Birkman Method exists to measure those three structures. This paper sets out what the instrument is, the evidence behind it graded by who produced that evidence, the academic studies the field cites most, and the commitments that govern its use at Infinitum Leadership, where Birkman serves as Step 1 of a two-step assessment pathway: the wiring first, then the behaviour work of the LEADS Framework in Step 2.

The paper's evidence verdict is favourable where the record is strongest. The instrument's reliability is documented in detail by its publisher — test-retest reliabilities averaging .85 and coefficient alphas averaging .80 — and independently restated in peer-reviewed venues (Maxwell et al., 2016), on a documented normative base of 4,300 working adults and seven decades of continuous development and refinement since 1951. On that record, the method's psychometrics read as reliable and well suited to their designed purpose: developmental insight, delivered through coached conversation. The instrument's independent academic literature is small, and Infinitum's use of the method is sized to the whole record — developmental, interpretive, and always paired with a certified debrief. This paper explains why that use is justified and where its boundaries sit.

1. The problem: behaviour is the visible fraction

Two leaders can display identical behaviour for entirely different reasons, and the same leader can behave in opposite ways across two quarters without anything about their character changing. What changed, in the second case, is usually the environment: a reorganisation, a new manager, a team whose working style grinds against theirs. Kurt Lewin's formula, behaviour as a function of person and environment — B = f(P, E) — has been quoted in organisational psychology for generations because it names this plainly (Larkey and Knight, 2002). Most personality instruments measure the P side thoroughly and leave E to inference. A coach is then working from half an equation.

The gap shows up in predictable places. A leader described by colleagues as patient and thorough sits in a role that rewards speed, and within a year is described as rigid and irritable; colleagues read a character flaw where the data would show a person whose working conditions have stopped matching their needs. Teams misread each other the same way: a colleague who takes a day to answer a question is experienced as dismissive by someone who answers in minutes, when the underlying difference is processing style (Birkman International, n.d.-a). Birkman's own published

material makes the general point directly — people keep misunderstanding each other after taking personality assessments when the assessment describes only how someone behaves and leaves untouched what that person needs and expects from others (Birkman International, n.d.-b).

The Needs construct is the reason this instrument opens the Infinitum pathway. Needs, in Birkman's usage, are a person's expectations of other people and of their environment: how much social contact, structure, recognition, time to think, or freedom to act they require in order to keep behaving at their best. Needs are largely invisible. A leader's colleagues see the behaviour; they rarely see the conditions the behaviour depends on, and leaders frequently cannot articulate those conditions themselves until a debrief puts language to them. Development work that begins at the behaviour layer alone tends to produce resolutions the leader cannot sustain, because the plan was written for the visible fraction.

2. The instrument: one questionnaire, four perspectives

Roger W. Birkman began the work that became The Birkman Method in the 1940s and 1950s, in the orbit of pilot selection and the study of social perception. His *Test of Social Comprehension* appeared in 1951. The method reached mature form in his 1961 doctoral dissertation at the University of Texas at Austin, in which scales were constructed empirically: items were keyed against how people's behaviour, likes, and dislikes were described by others who knew them, so the instrument was built from observed social reality upward (Birkman, 1961). The method has been in continuous commercial and organisational use since, across more than 2.5 million administrations by the publisher's count (Birkman International, 2008).

The current instrument is a single online questionnaire of 298 items, typically completed in 30 to 45 minutes. From that one response set, the method derives four perspectives on the same person.

Interests. Ten occupational interest scales — including Artistic, Literary, Mechanical, Numerical, Outdoor, Persuasive, Scientific, and Social Service — reported as percentages. Interests describe where a person's energy naturally goes: the kinds of activity that engage them. In a leadership debrief, Interests answer a question coaching clients ask constantly in different words: why does some of my work feed me and some of it drain me, when I am good at both?

Usual Behaviour. Component scores on a 1–99 scale describing the person's effective, observable behaviour — the strengths colleagues rely on. Current Signature practice works with nine components: Social Energy, Physical Energy, Emotional Energy, Self-Consciousness, Assertiveness, Insistence, Incentives, Restlessness, and Thought (Evans, 2026). Earlier editions of the method described eleven components, and readers of older technical material will meet both counts; the paper returns to this versioning point in the limitations section.

Needs. The same nine components, scored for what the person needs from their environment and from other people. A high Social Energy Usual score paired with a low Social Energy Need describes someone who performs sociability skilfully and pays for it, requiring solitude to recover. Needs scores are the instrument's distinctive contribution: expectations measured on the same dimensions as behaviour, so the two can be placed side by side.

Stress Behaviour. A derived set of component values describing the reactive behaviour that emerges when Needs stay unmet over time. Birkman's debrief guidance is precise about

interpretation: Stress Behaviour is conditional and cumulative. It predicts a tendency under sustained unmet need; it describes neither a mood nor a character verdict (Birkman International, n.d.-c).

These perspectives are summarised on the **Birkman Map**, a four-quadrant graphic — the familiar red, green, yellow, and blue quadrants — plotting symbols for Interests, Usual Behaviour, Needs, and Stress Behaviour. The Map gives a client and a coach a shared picture in the first minutes of a debrief. The Map is a communication layer; the defensible content of the instrument sits in the continuous component scores beneath it, and Infinitum debriefs treat it that way.

The report family extends well beyond a single document. The Signature Report combines the Map, Interests, component breakdowns in Usual, Needs, and Stress form, a Career Exploration section matching the profile against 22 job families and more than 100 job titles linked to O*NET occupational data, and an Action Plan scaffold. The wider Signature Suite runs to more than forty report formats, including coaching pages, comparative reports for pairs and teams, and leadership reporting. A separate instrument, **Birkman 360**, gathers multi-rater feedback across nine competencies from supervisors, peers, and direct reports — with a minimum of three respondents required in each rater perspective other than Self and Manager before results are shown, protecting rater anonymity — and its results can be read alongside the respondent's Birkman profile (Buckner, n.d.). In the Infinitum pathway, Birkman 360 is the hinge between the two steps: self-perception from the questionnaire meets observed behaviour from colleagues, and the LEADS work of Step 2 begins from the comparison.

3. Step 1 in the pathway: wiring before behaviour

Infinitum's assessment pathway has two steps, and the order is the argument of this paper.

Step 1 — Birkman: the wiring. Interests show where energy comes from. Needs show the conditions effective behaviour depends on. Stress Behaviour shows the failure mode when conditions lapse. A completed Birkman debrief gives a leader a working model of their own operating system: what to protect, what to request, what to watch for in themselves when a quarter turns difficult.

Step 2 — LEADS: behaviour in action. The LEADS Framework (LEADS in a Caring Environment, refreshed 2026) describes leadership behaviour across its domains and capabilities, and Infinitum's LEADS assessment — documented in the companion white paper — examines how the leader's behaviour lands in their actual context, including 360-degree perspectives. Behaviour is where development plans live, because behaviour is what colleagues experience and what organisations reward.

Sequencing matters for a practical reason. Behaviour-change goals set without the wiring tend to fail in characteristic ways: the leader commits to greater visibility while their Needs data show visibility is the most expensive thing they do; the plan schedules it daily; the plan collapses by March, and the leader concludes they lack discipline when the plan lacked design. Working from the Birkman data first, the same goal gets designed around the wiring — visibility concentrated where it counts, recovery protected, stress signals named in advance. Wiring knowledge also changes how Step 2 feedback is heard. A LEADS 360 finding that a leader "goes quiet under

pressure" lands as information when the leader already understands the Stress Behaviour pattern underneath it; without that groundwork, the same finding lands as accusation.

4. The evidence: what the record shows, and who produced it

This paper grades its sources the way the other papers in this series do: vendor documentation is labelled vendor documentation, independent work is labelled independent, and claims are sized to the strongest class of evidence beneath them.

4.1 Reliability

The publisher's Technical Fact Sheet reports test–retest reliabilities averaging .85 and coefficient alphas averaging .80 across the instrument's scales (Birkman International, 2008). Those averages are restated with their full spread in the peer-reviewed literature: Maxwell et al. (2016), summarising the technical manual's data in the *American Journal of Pharmaceutical Education*, report test–retest correlations across 27 scales ranging from 0.57 to 0.91 with a mean of 0.79, coefficient alphas ranging from 0.54 to 0.88, and item-response-theory analyses indicating measurement precision sufficient to discriminate reliably for between 58% and 95% of individuals per scale. A dedicated test–retest study at a two-week interval with 77 respondents found mean reliabilities of .81 for Usual Behaviour, .73 for Needs, and .89 for Interests (Larkey and Knight, 2002).

Read together, the record is a strong one for an instrument of this kind. The fact sheet's averages — test–retest at .85, alpha at .80 — sit at or above the levels psychometric convention treats as good for instruments used developmentally, and the independent restatement and the dedicated Larkey and Knight study corroborate them from outside the fact sheet itself. Interests are the most stable family of scales.

The full spread deserves a fair reading. The ranges in Maxwell et al. run across the instrument's component and interest scales together — eleven components in the 2008 documentation, each read in Usual, Needs, and Stress form, plus ten interest scales — and they include short scales, where lower coefficients are expected and carry less weight, because interest results are reported as percentages and read as energy patterns rather than as fine-grained scores. The weakest scale (alpha 0.54) receives interpretive care in debrief, and scores are always read with their uncertainty, as Section 7 sets out. Needs scores, at .73 over two weeks, are the least stable family — consistent with the construct itself, since expectations of one's environment plausibly move as environments change. Infinitum debriefs treat Needs data as well-supported hypotheses about working conditions, tested against the client's own experience during the conversation, which is how the instrument's own debrief method is designed to treat all of its data.

4.2 Validity

The publisher reports that face validity, convergent and divergent construct validity, and criterion-related validity have been established, with the full evidence held in *The Birkman Method Manual* (Birkman et al., 2008), a document sold through the publisher. Construct comparisons have been conducted against established instruments including the NEO-PI, the MBTI, the 16PF, and the Hogan Personality Inventory in IPIP form. Maxwell et al. (2016) observe that convergent relationships

with the MBTI concentrate in the behaviour and communication scales, while the instrument's perception-of-others scales — roughly half its content, the Needs side — show little relationship to MBTI dimensions. That pattern is informative in both directions: it supports discriminant validity for the Needs construct, and it confirms the Needs scales measure something trait inventories leave out. The publisher additionally reports factor-analytic work aligning its personality scales with Big Five factors (Birkman International, n.d.-d).

Criterion validity marks the boundary of the public record, and this paper states the position plainly because the boundary shapes the claims made for the instrument. Hogan Assessment Systems, a competitor, concluded in its published comparison that evidence of predictive validity for the Birkman Method is not available in the public record and that the method lacks a large archive of criterion-related studies (Hogan Assessment Systems, 2021). A competitor's assessment deserves its own caution label. Even so, this review located no public criterion archive that answers it. The boundary is a statement about claim scope: the evidence assembled here supports developmental interpretation, and prediction sits outside both the record and Infinitum's use. The normative foundation is documented — the 2007 normative sample comprised 4,300 working adults stratified by gender, ethnicity, age, and occupation across industries including health care, engineering, financial services, and education (Birkman International, 2008) — and scale development employed factor analysis, item response theory, and classical test theory. Norms and sound construction support descriptive and developmental interpretation well; Section 7 draws the operational line that follows.

4.3 The record, read as a whole

Taken together, the record has a consistent shape. The reliability evidence is documented in detail, corroborated by independent restatement, and strong for developmental work. The normative base is large, stratified, and published. The construction methods — factor analysis, item response theory, and classical test theory — are the field's standard toolkit, applied across seven questionnaire revisions and more than seventy years of continuous development since 1951. The construct evidence differentiates the instrument's distinctive contribution: Needs measure expectations of the environment on the same components as behaviour, ground that trait inventories leave uncovered. The claims this record supports are developmental ones, and within that scope it supports them well: a reliable instrument, interpreted by a certified practitioner, that gives leaders and teams a precise shared language for interests, needs, and stress behaviour.

5. The most-cited studies: leadership, teams, careers

Birkman's academic literature is compact enough to survey nearly whole, and this section presents the studies the field actually cites, organised by the three domains in which Infinitum deploys the instrument. Citation counts are Crossref figures retrieved in November 2026 and are given where a count exists; several Birkman sources predate routine DOI registration, and their influence runs through practitioner channels that citation databases capture poorly. The section closes with the adjacent literatures that carry part of each domain's weight, labelled as adjacent.

5.1 Careers and self-awareness: Maxwell et al. (2016)

The most-cited Birkman-specific study located in this review (19 citations, Crossref) examined what a Birkman assessment plus training does for early-career professionals' self-knowledge. Maxwell and colleagues (2016) worked with pharmacy students who completed the Birkman assessment and a training session interpreting their results, measuring students' accuracy in describing their own interpersonal style — self-perception accuracy, the study's operational measure of self-awareness — alongside self-confidence. Self-perception accuracy improved by a mean of 1.6 points (95% confidence interval 1.3 to 1.9) following the assessment and training, a statistically robust gain; self-confidence did not change. The study matters for this paper because it tests the mechanism the debrief method depends on: structured feedback against component-level data sharpens how accurately people describe themselves. Its limits are equally clear — a single institution, a survey design without a control group, student participants, and an outcome measured close to the intervention. It supports a claim about self-awareness gains from assessed feedback. It supports nothing about job performance, and Infinitum cites it for the former only.

The careers application rests on broader ground as well. Birkman's career reporting matches profiles against 22 job families built from people established in those fields, linked to O*NET occupational data (Birkman International, n.d.-e). Practitioners use the Interests scales heavily in education and career-transition settings, where the debrief question — will this field let both my Interests and my Needs be met? — does genuine work (Andreen, n.d.). The scholarly frame for that question comes from the vocational interests literature: Nye et al. (2012), meta-analysing more than sixty years of research across sixty studies, found vocational interests relate modestly to performance and more strongly to persistence, and that congruence between a person's interests and their environment's characteristics outperforms interest scores alone as a predictor. Interests data earn their place in career conversations as fit data, exactly as the congruence finding suggests.

5.2 Teams: Serna and Wiese (2019)

The largest peer-reviewed Birkman dataset located in this review comes from higher education. Serna and Wiese (2019) analysed Birkman results from 2,378 fraternity and sorority members across 371 colleges and universities, documenting systematic differences between groups in Needs and Stress Behaviour scores. The study's value for team practice is its scale and its construct: at group level, Needs and Stress patterns are real, patterned, and consequential for how members experience the same community differently — precisely the perception gap that team debriefs work on when members share their profiles and discover that a behaviour one member experiences as support reads as pressure to another (Wessner, n.d.).

Honesty about the teams evidence requires a further sentence. No peer-reviewed study located in this review tests whether a Birkman-based team intervention improves a team's measured performance. The publisher's own 2007 survey of more than 160 consultants and clients ranked the factors practitioners see driving team success — communication first, then trust, cooperation, interpersonal conflict, and adaptation (Birkman International, 2007) — which describes where practitioners aim the instrument, and counts as practitioner testimony rather than outcome evidence. Infinitum's team use of Birkman therefore leans on the construct logic of Section 1, on the group-level patterning Serna and Wiese document, and on the team science assembled in the

companion paper on the Ad Infinitum Loop. The paper flags the outcome-study gap in its limitations rather than papering over it.

5.3 Leadership: the Leadership Profile studies and Dibble (2022)

The most substantial Birkman-based leadership research programme located in this review comes from educational leadership. Johnson's Leadership Profile, built on Birkman data, was used to profile 281 practising school principals in Texas and New Mexico — 109 men and 172 women — examining whether leadership behaviour follows gender stereotypes. The programme's recurring finding runs against the stereotypes: relational and interpersonal leadership behaviours among these administrators did not divide along the expected gender lines, and the profiles counseled against assumptions selection panels and development programmes routinely make (Johnson, Busch and Slate, 2008). The sample is educational rather than executive, and the paper claims its relevance accordingly: it is the largest Birkman leadership sample in the literature, and its lesson — profile data discipline stereotype — transfers directly to executive rooms.

The most recent leadership entry applies the method at department scale. Dibble (2022), in *The International Journal of Aerospace Psychology*, profiled entire business aviation departments — pilots, maintenance technicians, flight attendants, schedulers, and directors — against earlier Birkman aviation research, validating the profiles against interviews with department members and setting out leadership strengths and challenges at the level of the working unit (Crossref records no citations for the article as of November 2026; it is included for its recency and its department-level design). Practice evidence completes the leadership shelf: Harvard Business School's first executive coaching case study, "Coaching Makena Lane" by Professor Ethan Bernstein, follows a Birkman-informed coaching engagement with a high-performing leader whose unexamined Needs and Stress Behaviour were generating the peer complaints that brought her to coaching (Birkman International, n.d.-f). A teaching case proves classroom value, and it demonstrates the debrief mechanics of Section 6 in an executive setting; it is not outcome research, and this paper does not cite it as any.

The tail of the leadership literature deserves one honest note. Smaller studies continue to appear — a 2025 study of 24 banking leaders in the United Arab Emirates combined Birkman with a Big Five inventory and reported extraversion correlating with transformational leadership at r = .435 (Nawaz et al., 2025) — at sample sizes and designs that can generate hypotheses and little more. The pattern across domains is consistent: a small peer-reviewed layer alongside a wide practitioner base, with the instrument's evidentiary weight sitting in its construction record and its decades of applied use. Section 8 states what that means for a buyer.

5.4 The adjacent literature

Two bodies of independent scholarship support Birkman's constructs without studying Birkman itself, and the distinction matters enough to keep visible. Kristof-Brown, Zimmerman and Johnson (2005) meta-analysed 172 studies of person–environment fit and found that fit between a person's needs and what their environment supplies relates to job satisfaction and organisational commitment more strongly than fit defined by abilities and demands — scholarly grounding for treating Needs as a first-class variable in development work. Nye et al. (2012), discussed above, do the same work for Interests and congruence. Neither study validates the Birkman instrument; both

validate the questions the instrument asks. Claims in Infinitum's materials keep that boundary intact.

6. Design commitments in Infinitum's practice

Four commitments govern every Birkman engagement at Infinitum, each traceable to the evidence record above.

Certified interpretation, always. Birkman reports are never emailed to a client to read alone. Every engagement includes a debrief conversation with a Birkman Certified Professional, following the Signature Conversation structure: the Map first for orientation, then Interests, then the nine components with Usual, Needs, and Stress read together, then career implications (Birkman International, n.d.-g). The conversation is two-way by design; the client tests each page against their experience, and discrepancies are worked with rather than explained away. Forty-plus report formats and derived Stress values are too easy to misread for raw delivery to be responsible practice (Birkman International, n.d.-h).

The Usual–Needs gap is the coaching object. Debriefs locate the components where behaviour and need diverge, and coaching goals are built there: the conditions to request, the environments to design, the early stress signals to catch. This is the point at which Birkman data convert into the LEADS behaviour work of Step 2, and it is where the HBS case's coaching arc turns as well (Birkman International, n.d.-f).

Depth has an edge, and the debrief respects it. The instrument describes behaviour, motivation, expectation, and reaction. It does not reach a client's philosophy, history, or meaning-making, and skilled practitioners pair it with coaching conversation that can (De Filippis, n.d.). Infinitum's debriefs treat the report as the opening third of the conversation.

Data stewardship. Results belong to the client. In organisational engagements, sponsors receive only what the client agrees to share; Birkman 360 reporting enforces its anonymity floors (minimum three respondents per perspective) before any multi-rater data is shown (Buckner, n.d.).

7. Standards and scope: developmental use, never selection

The *Standards for Educational and Psychological Testing* (American Educational Research Association, American Psychological Association and National Council on Measurement in Education, 2014) place the burden of validity on the use to which a test is put: evidence sufficient for one purpose does not transfer to another. Sized against the record in Section 4, Birkman's public evidence supports developmental interpretation — self-awareness, coaching design, team conversation, career exploration. It does not supply the criterion evidence that hiring, promotion, or screening decisions require, and Infinitum draws the line where the evidence ends.

Infinitum never uses Birkman data for selection, screening, promotion, or any employment decision, and never provides Birkman data to a third party for those purposes. The boundary aligns with the publisher's own published caution that no workplace assessment should be used as

the sole tool in hiring decisions to predict performance (Birkman International, n.d.-b). Vendor framing of "culture fit" receives the same treatment in Infinitum's practice: fit data inform development conversations, and the known bias risks of fit language in hiring are a further reason the data stay out of selection entirely (Birkman International, n.d.-i).

Within its scope, the instrument's use follows the Standards' ordinary disciplines: administration by a certified practitioner, interpretation that reports scores with their uncertainty, and re-assessment treated cautiously given the Needs family's test–retest profile (Larkey and Knight, 2002).

8. Limitations

1. **Much of the psychometric archive sits with the publisher.** Headline reliability and validity evidence traces to the publisher's manual (Birkman et al., 2008), a paid document, summarised in a one-page fact sheet. Independent restatement exists (Maxwell et al., 2016); the fact sheet reports averages, and the full scale-level spread behind them, including its low end, is restated independently and reported in Section 4.1.
2. **The independent academic literature is small.** The most-cited Birkman-specific study located carries 19 Crossref citations. Located peer-reviewed work concentrates in educational settings; no peer-reviewed outcome study of Birkman-based executive coaching was found, and no study testing Birkman team interventions against team performance outcomes was found.
3. **No public predictive-validity archive exists.** That absence sets the claims boundary drawn in Section 7; it does not bear on the developmental uses the reliability record supports. Any vendor or practitioner claim that Birkman predicts job performance exceeds the public evidence.
4. **The instrument has changed across editions.** Component counts (eleven in 2008 documentation, nine in current practice), scale names, and scale totals differ across the sources in this paper's reference list. Figures are dated where quoted; cross-edition comparison requires care.
5. **Vendor popular content includes unreferenced statistics.** Claims such as a fixed percentage of the population whose external and internal personalities differ appear in the publisher's articles without cited sources and are relied on nowhere in this paper.

9. Conclusion

The Birkman Method earns its place at the front of the Infinitum pathway on the strength of one construct executed well: Needs, measured on the same components as behaviour, so a leader can see the conditions their best behaviour depends on and the pattern that replaces it when those conditions fail. The evidence record supports that developmental use: reliability documented in detail and independently restated, a normative base of 4,300 working adults, a small academic literature whose best studies are named and bounded, and an explicit boundary against predictive claims. Paired with the LEADS behaviour work of Step 2, the wiring diagram and the behaviour plan together give a coaching engagement both its starting map and its destination: a leader who understands what they need, behaving in ways their organisation can see, value, and trust.

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infinitum LEADERSHIP

Put the evidence to work

The Birkman Method is Step 1 of the Infinitum assessment pathway — the wiring beneath the behaviour work that follows. Engagements begin with the questionnaire and a certified debrief, giving the leader a working model of their own operating system before any development plan is written.

Start with a conversation

Book a discovery call to discuss a Birkman debrief, executive coaching, or an assessment program for your team. infinitumleadership.com

Read more of the evidence

Infinitum's white papers and research summaries are collected on the Evidence page. infinitumleadership.com/evidence

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