Leadership Effectiveness

Report Samples
Candidate Assessment Report

Chris Williams
ABC Company
INTRODUCTION

This Candidate Assessment Report presents the results of an evaluation on Chris Williams as part of a candidate selection process for ABC Company. It is based upon the completion of an assessment instrument measuring approach to leadership. This report is organized into sections:

Assets and Potential Challenges
Based on this individual’s assessment results, this section presents a narrative summary of this candidate’s assets as well as some of the potential challenges the candidate may encounter in fulfilling the responsibilities of the role.

Motivational Considerations
Based on the results of the motivational assessment, this section presents a description of some of the key aspects of this individual’s motivational profile.

Interview Questions
This section presents several interview questions that can be used to further explore this candidate’s profile in more depth.

Role Profile
This individual completed the Leadership Effectiveness Analysis (LEA) questionnaire which measures how a person approaches the leadership role in terms of 22 characteristics. This section provides this individual’s LEA results against the role requirements of the position. This individual’s scores on each of the 22 dimensions are shown by a “dot”. The role requirements for the position are shown by a shaded range.

Job Match
This section summarizes the information presented in the LEA profile by listing those dimension scores which fall within the targeted role requirements range as well as those dimensions that fall below the targeted role requirements range.

Caution:
This Candidate Assessment should be considered as only one component of the selection process. In reviewing the results of this assessment it is extremely important to consider all factors when evaluating this candidate including:

- Prior Work History
- Job Interviews
- Relevant Life Experiences
- Education
- References
- Other Job Relevant Information
ASSETS

Based on the profile for Chris Williams, the following characteristics are likely to contribute to potential effectiveness in the role:

1. Persuasive and convincing; likely to try to influence others’ points of view; uses language to build commitment for ideas; can be an effective advocate for ideas or initiatives

2. Keeps others enthused and engaged; builds emotional commitment; can be dramatic and inspiring; operates with energy and intensity; can inspire emotional expression in others

3. Assertive and competitive; pushes to achieve results; can be forceful in the face of obstacles; works well in a challenging environment; does not shy away from conflict or debate

4. Works hard and sets high standards for achievement for self and others; emphasizes the importance of being serious about goals; strong work ethic; ambitious and willing to work hard to achieve success

5. Very direct and straightforward; provides frank and direct feedback; let’s people know where they stand; quick to clear up ambiguity; does not shy away from delivering difficult messages

6. Takes own counsel; highly independent thinker; works well with autonomy; trusts own instincts; confident in own opinion; self-directed

7. Friendly, sociable and outgoing; has an easy and informal way with others; socially skilled; likes to establish a friendly atmosphere in teams; easy sense of humor; at ease in social situations

8. Persistent, follows-up; stays on top of tasks and goals until they are complete; strong follow-through efforts; keeps promises; not easily discouraged; will not give up easily; needs little external motivation for self-discipline

9. Responsive and supportive to those in positions of authority; will turn to more senior resources for direction, decisions and information; likely to be loyal to the organization; conscientious and generally willing to follow the organizational rules
POTENTIAL CHALLENGES

Based on the profile for Chris Williams, the following characteristics may potentially reduce performance and potential in the role:

1. Tendency to be less organized; less attentive to details; less systematic in work methods; can be too vague in providing guidelines; less careful in following procedures

2. Less emphasis placed on building and using expert knowledge; may not take the time to develop specialized skills; may be less effective when working with colleagues or customers who expect greater expertise; may risk not staying up-to-date in industry or area of expertise

3. May fail to review and learn from past practices; may take longer to learn from mistakes; may be less cautious regarding risk; may take less time to evaluate consequences; may be less attentive to upholding organizational traditions

4. Less focused on helping others; less willing to compromise; may not accommodate to support team goals; may pursue own priorities without considering the needs of the team; less likely to go along for the sake of harmony

5. Little effort invested to keep emotions in check; less likely to be reserved especially under stress or in a highly emotional situation; may sometimes say things that would be better left unsaid; may respond too quickly when waiting would be wiser

6. Hesitant to consider new ideas or approaches; less open to taking risks; less concerned with challenging outmoded assumptions and methods; less likely to respond as quickly in fast changing environments

7. Less attention to long-term implications of issues and actions; less time spent on analysis and planning; may be too reactive or too short-term focused; may not think ahead; may not anticipate problems or consequences

8. Less concerned with immediate responses and quick reactions; may be less attentive to the day-to-day activities; may have less of a sense of urgency; may tend to be less hands-on and sometimes generate somewhat impractical solutions

9. May come across as too aggressive and overbearing; may unnecessarily take an adversarial approach; may see too many things in terms of win/lose outcomes; may argue when discussion would be more constructive

10. May sometimes demonstrate more enthusiasm, emotion or energy than is useful in the situation; may be less effective when there is a need to be the calming influence in a situation; being constantly on the go may unintentionally create some degree of chaos
MOTIVATIONAL CONSIDERATIONS

These statements provide additional insights into the motivational patterns of Chris Williams

1. Strong emphasis placed on setting and achieving ambitious goals is further reinforced by a motivation to excel and to achieve at the highest levels

2. A tendency to be highly independent minded and a preference for doing things on one’s own is further reinforced by a motivation for independence and for freedom from interference from others

3. A persistent, tenacious approach to monitoring tasks and activities is further reinforced by a motivation for endurance and the demonstration of determination and willpower

4. Drawn to innovation and seeking out new and different ideas and activities; enjoys creative pursuits; likes to engage with creative people; looks for new ways of doing things

5. Motivated to be efficient, organized and focused on the details of the process; likes to create order out of chaos; attentive to administrative aspects; prefers at least some degree of rules and guidelines

6. Enjoys looking for options and taking advantage of opportunities; energized by outmaneuvering an obstacle

7. Likes intellectual stimulation and logical, analytical and investigative thinking; likes time to think through things thoroughly

8. Strong appetite for setting and achieving ambitious goals; likes to push self and others to achieve at the highest levels

9. Energized by being persistent and tenacious; values overcoming obstacles through willpower and endurance; takes pride in not giving up

10. Gains satisfaction from being self-reliant and staying free of external controls on personal autonomy; prefers to operate independently and will likely chafe if there are many restricts or rules

11. Values predictability, stability and a consistent environment; prefers a secure and steady rhythm with relatively few surprises

12. Enjoys recognition, status and attaining a level of prominence and importance; seeks to be valued and respected; prefers to be in the inner circle or a member of an elite group
INTERVIEW QUESTIONS – Strategic

Chris Williams scored lower on Strategic indicating somewhat less emphasis placed on taking a long-range, broad approach to solving problems and decision-making. This may result in spending less time in objective analysis, thinking ahead and planning than is ideal. This may reduce effectiveness when the role requires this individual to:

• Be future and long-term oriented
• Anticipate challenges, risks, interdependencies and opportunities
• Be effective at strategic planning
• Utilize strong analytical thinking skills

Use one or more of the following Interview Questions to explore the orientation Chris Williams has towards Strategic:

1. Please describe a situation where your contingency planning was especially effective. How did you anticipate potential problems, obstacles or opportunities?

2. Please describe the processes and resources you use to stay current with trends. How do you anticipate what customers might want/need or where the market may be heading?

3. Please contrast two actual situations: One in which you planned well, including the use of interim goals, resources needed and interdependencies and one where you feel your planning was insufficient. What led to your choice to approach these situations differently? What did you learn from these experiences?

4. What approaches do you take to ensure that the tactical activities of your group are well aligned with the strategic objectives of your organization?

5. Please give an example of a situation that required you to analyze a significant amount of information in order to make an effective decision. How did you ensure you approached this analysis strategically and avoided getting lost in the details of the information?

6. Organizations are working at an increasingly fast pace – how do you balance the sometimes competing priorities of doing things quickly and taking the time needed to approach things more strategically?

NOTES:
INTERVIEW QUESTIONS – Cooperation

Chris Williams scored lower on Cooperation indicating less emphasis placed on being accommodating to the needs and interests of others. This may result in being seen as less helpful and less willing to compromise than is ideal. This may reduce effectiveness when the role requires this individual to:

- Be helpful and accommodating to colleagues
- Be willing to compromise
- Put own interests aside for the common good
- Go along for the sake of harmony when needed

Use one or more of the following Interview Questions to explore the orientation Chris Williams has towards Cooperation:

1. Leaders within organizations often need to decide when to push for their own agenda and when to compromise or accommodate the needs and interests of others. How do you decide when to be a strong self advocate and when to compromise or accommodate to the needs and interests of others?

2. Please give an example of when you chose not to cooperate or compromise that yielded a less desirable outcome. In hindsight, how would you have handled this situation differently?

3. Most leaders are in situations where they need to be effective in both the team leader role as well as the team member role. How does your approach to cooperation and compromise change in these two different roles?

4. In many workplaces the pace and volume of work is significant. Have you found ways to work that allow you to accomplish your own objectives and still have time to help others achieve their objectives?

5. When are you most likely to help your colleagues? When are you least likely to help your colleagues?

NOTES:
Welcome to Leadership 360®! This powerful process of personal development is designed to provide feedback to you on 22 leadership practices from your own perspective as well as from the perspectives of your boss (or bosses), your peers, and your direct reports. This 360-degree feedback data will provide you with an encompassing view of how you are perceived to operate in your current leadership role.

The Leadership 360® Personal Feedback Report contains your individual feedback profile. It is based upon your own responses to the Leadership Effectiveness Analysis (LEA) Self Questionnaire, as well as LEA Observer Questionnaires completed by the following respondents:

Number of Respondents:

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<tbody>
<tr>
<td>Your Boss(es)</td>
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<tr>
<td>Your Peers</td>
<td>3</td>
</tr>
<tr>
<td>Your Direct Reports</td>
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To help you understand the degree to which you are currently using the leadership practices being profiled, your scores have been compared to a large normative database of leaders who have completed the LEA Self Questionnaire. You will receive scores expressed in terms of percentiles. For example, if you have a score at 75%, then you scored higher than 75% and the same as or lower than 25% of the people in the normative group. The specific norms that have been used are:

Normative Groups: North America n=91964 (Jan2012)

Presented by: Management Research Group
INTRODUCTION

Leadership 360® is based on the principle that your development may be helped significantly by your own insights into the strengths and weaknesses of your leadership approach. The foundation of the Leadership 360® process is diagnostic feedback: feedback which diagnoses those practices or behaviors that need to be sustained, modified or added to your leadership repertoire.

The attitude you have toward feedback will strongly influence the usefulness of this analysis. Please keep the following advice in mind as you proceed through your Personal Feedback Report:

- **Use the information as a developmental aid.** Avoid viewing your feedback as the final word on your performance; instead, use it to help plan tactics and strategies to enhance your future effectiveness.

- **The leadership practices in your feedback profile are behaviors.** Behaviors can be changed; thus, you have control over the factors that can help you attain maximum effectiveness as a leader.

- **Trust the feedback profile’s description of your approach to the leadership role.** The Leadership Effectiveness Analysis™ questionnaires are proven, professional instruments that do show how individuals actually behave in leadership roles.

- **Do not view high scores as “good” and low scores as “bad.”** A given leadership orientation is rarely all positive or all negative. There are potential assets and potential liabilities for both high and low scores. For example, a high score on Empathy indicates sensitivity to and concern for other people. Alternatively, the strongly empathetic leader may be seen as avoiding conflict or perhaps having problems handling difficult interpersonal issues.

- **Recognize that the aim of the Leadership 360® process is to help you achieve your goal of increased leadership effectiveness.** Your development as a leader will be enhanced through (1) recognizing your strengths and weaknesses, and (2) designing strategies to enhance strengths and address weaknesses.

PROFILE ELEMENTS

The following pages present the profiles of your scores on 22 leadership practices, graphically showing your own perspective as well as the perspectives of your boss(es), peers, and direct reports. To ensure the confidentiality of individuals providing their input to you, only averaged responses are provided for peers and direct reports. If your respondents include more than one boss, these responses have also been averaged.

**Degree of Rater Agreement:**

Immediately to the right of the observer graphs the word High, Medium, or Low will appear when an average consists of at least 2 observers. This reflects the consistency of agreement among your observers on each of the leadership practices. High agreement means that the scores of 75% or more of your observers are clustered within 25 points of each other. Medium agreement means that the scores of 50-74% of your observers are similarly clustered. Low agreement means that the scores of fewer than 50% of your observers fell within a 25 point range. High agreement among your observers suggests that you are impacting them in about the same way. Low agreement, on the other hand, suggests that the nature of your relationships with the individual observers may be different and therefore they react to you differently.
The world of the modern organization is complex, filled with challenges as well as exciting opportunities. In order to survive and prosper, an organization must have the enthusiastic commitment of its members, with their imagination and potential for independent thinking fully focused on its tasks, problems, and opportunities.

All members of the organization are being asked to evaluate issues in their areas and offer better ways of responding. While this is especially true for the managerial and supervisory staff, it is also true for individual contributors. Each person has the power to create new visions and new realities for the organization. Clearly, the organization will need to provide a climate that invites the participation of all. Nevertheless, each person can take the initiative in thinking through and evaluating the problems, opportunities and situations encountered every day in a way that is unique to him or her.

The five Sets involved in Creating a Vision are:

**CONSERVATIVE**

**INNOVATIVE**

**TECHNICAL**

**SELF**

**STRATEGIC**
Conservative

Studying problems in light of past practices to ensure predictability, reinforce the status quo and minimize risk.

Your Score: 10%

Less focused on what has worked in the past; do not rely on precedents; less concern for acting cautiously

Respect tradition; rely on past practices; build on knowledge gained through experience

Rater Agreement:

Innovative

Feeling comfortable in fast-changing environments; being willing to take risks and to consider new and untested approaches.

Your Score: 15%

Less attracted to exploring new ideas or approaches; leave well enough alone; avoid unnecessary risk-taking

Welcome new ideas and perspectives; comfortable with change; willing to take risks; experimental attitude

Rater Agreement:

Technical

Acquiring and maintaining in-depth knowledge in your field or area of focus; using your expertise and specialized knowledge to study issues in depth and draw conclusions.

Your Score: 5%

Prefer the role of generalist; less concerned with acquiring and utilizing specific technical expertise

Emphasize in-depth knowledge; stay up-to-date in your field; base decisions on specific technical expertise

Rater Agreement:
PROFILE REVIEW

This section of your Personal Feedback Report will provide interpretive reviews of your boss, peer, and direct report feedback data. The purpose of these interpretive reviews is to help you understand and focus on the key points in each observer group's perceptions of your leadership practices. For each observer group, the review will consist of the following elements:

**Perceptions:** A series of statements outlining the major interpretive points suggested by the feedback of the specific observer group.

**Developmental Opportunities:** Several issues suggested by the perceptions of the specific observer group that indicate potential liabilities requiring developmental attention.

**Comparative Profile:** A one-page LEA profile comparing your self-reported scores to the scores of each observer group.

In addition, a one-page LEA profile is provided that shows all 22 of your own scores together with all of the observer scores available for your report.
PERCEPTIONS OF YOUR BOSS

The following summary presents the major interpretive points suggested by your Boss responses. This information is derived from an analysis of very high and very low scores in various combinations. Information which may appear to be “missing” reflects only that the scores being analyzed for any specific interpretive statement did not reach a level above 70% or below 40%. As you read these statements, you may wish to mark or highlight those you agree represent significant aspects of your leadership approach, or those you would like to explore further in your developmental planning. From the perspective of your Boss, you are seen as:

Creating a Vision

☐ Strongly oriented toward the energizing, motivating aspects of leadership, but not always knowing exactly where things are headed or how to get there.

☐ Not particularly oriented toward being analytical or paying careful attention to potential implications and contingencies.

☐ Not one to share a lot of information or outline plans and goals; inclined to let others figure things out for themselves.

☐ Willing to let others do the strategizing.

Developing Followership

☐ A persuasive individual who tends to depend upon instinct and intuition about an issue, but who has an ability for convincing others and bringing them along.

☐ Emotionally expressive when trying to persuade others; using enthusiasm, energy and emotional intensity in order to be more convincing.

☐ Emotionally expressive and reactive; openly spontaneous and energetic; making little effort to restrain or conceal emotions.

☐ Placing more emphasis on communicating in a convincing, persuasive and influential fashion than on communicating simply to share information.

Implementing the Vision

☐ Working on a day-to-day basis, without paying much attention to the long-range aspects of a problem or the specific details of how tasks are to be accomplished.

☐ Flexible and adaptable, but perhaps disorganized; not tied to doing things the way they have always been done or likely to outline specific, step-by-step processes for task accomplishment.

☐ Focusing on short-term task accomplishment rather than planning and analyzing longer term and broader implications; a hands-on doer with a strong orientation towards approaches that are practical and results-oriented.

☐ Hands-on and involved in day-to-day action; willing to jump in and do what is necessary to get things done; impatient with structure, detail and organization, and unlikely to set up systems that will eliminate recurring problems.
ABC Company, in consultation with your MRG Associate, Management Research Group, developed a series of customized questions for the purpose of providing you with additional information on some areas that are very important for your work within ABC Company. These customized questions were included in the questionnaire that you completed. The following pages contain these questions and the corresponding responses.

**Number of Respondents:**
- Self: 1
- Bosses: 1
- Peers: 3
- Direct Reports: 5

**How to read this report:**

- **The Feedback Graphs:** Each question gathered responses on a scale of 1 (lowest) to 7 (highest). Here is an example:

<table>
<thead>
<tr>
<th>Key:</th>
<th>S = Self</th>
<th>P = Peers</th>
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<tbody>
<tr>
<td>M = Mean</td>
<td>B = Boss(es)</td>
<td>DR = Direct Reports</td>
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<tr>
<td>SD = Standard Deviation</td>
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1. **Financial understanding** *(understanding and dealing with business requirements and financial policies of XYZ Company, including budgeting, accounting, costs, P&L statements, etc.):*

<table>
<thead>
<tr>
<th>Respondents provided ratings on this scale:</th>
<th>Don't Know</th>
<th>M</th>
<th>SD</th>
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<tbody>
<tr>
<td></td>
<td>0</td>
<td>6.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1 = Almost no understanding</td>
<td>0</td>
<td>5.00</td>
<td>0.00</td>
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<tr>
<td>2 to 3 = Limited understanding</td>
<td>1</td>
<td>4.33</td>
<td>.71</td>
</tr>
<tr>
<td>4 = A basic understanding</td>
<td>1</td>
<td>5.25</td>
<td>1.41</td>
</tr>
<tr>
<td>5 to 6 = A good grasp</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>7 = A very strong understanding</td>
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- **Your scores:** Your feedback scores are presented graphically and numerically. To ensure the confidentiality of your peers and direct reports, their responses have been averaged (Mean). The Mean score for Self and Boss are simply the scores for that question. If your observers include more than one boss, their responses have been averaged. Standard Deviation is provided for each observer group comprised of 2 or more individuals. The column labeled “Don’t Know” shows the number of respondents who selected “Don’t Know” instead of a numerical rating.
Questions from ABC Company

Client/Customer Focus

1. Focuses team’s efforts on meeting customer needs (helps team members understand their roles in meeting customer needs, keeps customer a top priority within the team)

   Respondents provided ratings on this scale:
   
   1 = No focus on customer needs
   2 to 3 = Very little focus on customer needs
   4 = Average
   5 to 6 = Moderate focus on customer needs
   7 = Extremely focused on customer needs

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<th>7</th>
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</thead>
</table>
   S     |    |   |   |   |   |   |   |
   B     | 0 | 4 | 0 | 4 | 0 | 0 | 0 |
   P     | 0 | 4.67 | 2.08 |
   DR    | 0 | 3.40 | 1.14 |

2. Builds strong relationships with customers (makes strong connections with customers, spends time building relationships with customers)

   Respondents provided ratings on this scale:
   
   1 = Poor relationship with customers
   2 to 3 = Weak relationships with customers
   4 = Average
   5 to 6 = Builds good relationships with customers
   7 = Builds extraordinary relationships

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</table>
   S     |    |   |   |   |   |   |   |
   B     | 0 | 5 | 0 | 5 | 0 | 0 | 0 |
   P     | 0 | 5.00 | 1.73 |
   DR    | 0 | 3.00 | 1.00 |
Additional Comments

ABC Company, in consultation with your MRG Associate, Management Research Group, developed a series of open-ended questions in order to provide you with additional comments and suggestions. The following pages contain these questions and the corresponding responses. The responses have not been edited – they appear exactly as they were entered into the questionnaire. To preserve confidentiality, responses from peers and direct reports are grouped in random order.

Please note that responding to these questions was optional. Therefore, your observers may not have answered every question.
Additional Comments

1. What are this person's most valuable leadership strengths?

Your comments:
No Comment

Comments from your Boss(es):
Chris is extremely results focused and seldom fails to attain the sales objectives set for him.

Comments from your Peers (random order):
Really good team member; very engaging and enjoyable to hang out with.

No comment

He is very engaging and enjoyable to be around.

Comments from your Direct Reports (random order):
Direct report comments here

No Comment

Interpersonally quite skillful although can get overly emotional.

No Comment

No Comment

2. What are this person’s most important developmental needs?

Your comments:
No Comment

Comments from your Boss(es):
Chris needs to understand the broader issues effecting the business.

Comments from your Peers (random order):
No Comment

Peer comments here

No Comment

Comments from your Direct Reports (random order):
Overly critical and emotional.

I feel that he is only interested in making his sales goals and really spends little time with my development.

No Comment

He can be overly critical.

As a new sales rep I don't feel that I receive very clear guidance or assistance.
Leadership Impact Report

Chris Williams
ABC Company
8/23/2013
Number of Respondents:
Boss(es):  1
Peers:  3
Direct Reports:  5

Organizational Impact

1. **Overall effectiveness as a leader/manager** (i.e., total level of performance against expectations, total impact in role):

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<th>X</th>
<th>M</th>
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<tbody>
<tr>
<td>Shows little effectiveness</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td>0</td>
<td>4.00</td>
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<tr>
<td>Not a great strength</td>
<td>P</td>
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<td></td>
<td></td>
<td></td>
<td>0</td>
<td>5.50</td>
<td>0.71</td>
</tr>
<tr>
<td>Average</td>
<td>DR</td>
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<td></td>
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<td>0</td>
<td>5.60</td>
<td>0.89</td>
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<tr>
<td>A good, solid leader/manager</td>
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<td>▲</td>
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<tr>
<td>In a class by him/herself</td>
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<td>Don't know</td>
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2. **Future potential** (i.e., has the ability to go beyond present level versus has reached his/her highest potential, is likely to be a major resource to the organization):

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<th>7</th>
<th>X</th>
<th>M</th>
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<tr>
<td>Has limited potential</td>
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<td>0</td>
<td>6.00</td>
<td>0.00</td>
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<tr>
<td>Needs to develop in current job</td>
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<td>0</td>
<td>5.67</td>
<td>1.15</td>
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<tr>
<td>Some possibilities</td>
<td>DR</td>
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<td></td>
<td></td>
<td>0</td>
<td>5.00</td>
<td>1.22</td>
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<tr>
<td>Strong possibilities beyond present job</td>
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<td>▲</td>
<td></td>
<td></td>
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<tr>
<td>Unlimited; a major resource</td>
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<tr>
<td>Don't know</td>
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3. **Delivers Results** (i.e., accomplishes a great deal, achieves significant results, focuses on measurable outcomes)

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<tbody>
<tr>
<td>Delivers significantly less results than expected</td>
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Organizational Impact (Continued)

4. **Demonstrates Ethical Leadership** (i.e., behaves in an ethical manner, encourages ethical behavior in others, stands up for what is right, chooses the honorable course of action)

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<th>1</th>
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<tr>
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</table>

MRG research indicates these LEA variables are generally related to this area of leadership effectiveness:

<table>
<thead>
<tr>
<th>Lower scores on:</th>
<th>Higher scores on:</th>
</tr>
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<tbody>
<tr>
<td>Authority</td>
<td>Strategic</td>
</tr>
<tr>
<td>Self</td>
<td>Management Focus</td>
</tr>
<tr>
<td>Restraint</td>
<td>Communication</td>
</tr>
<tr>
<td>Conservative</td>
<td>Excitement</td>
</tr>
<tr>
<td></td>
<td>Technical</td>
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<tr>
<td></td>
<td>Persuasive</td>
</tr>
<tr>
<td></td>
<td>Control</td>
</tr>
<tr>
<td></td>
<td>Production</td>
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</tbody>
</table>
Number of Respondents:
- Boss(es): 1
- Peers: 3
- Direct Reports: 5

Organizational Impact

1. **Overall effectiveness as a leader/manager** (i.e., total level of performance against expectations, total impact in role):

<table>
<thead>
<tr>
<th>Shows little effectiveness</th>
<th>Not a great strength</th>
<th>Average</th>
<th>A good, solid leader/manager</th>
<th>In a class by him/herself</th>
<th>Don't know</th>
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<td>0 5.60 0.89</td>
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2. **Future potential** (i.e., has the ability to go beyond present level versus has reached his/her highest potential, is likely to be a major resource to the organization):

<table>
<thead>
<tr>
<th>Has limited potential</th>
<th>Needs to develop in current job</th>
<th>Some possibilities</th>
<th>Strong possibilities beyond present job</th>
<th>Unlimited; a major resource</th>
<th>Don't know</th>
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<td>0 5.67 1.15</td>
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</tbody>
</table>

3. **Delivers Results** (i.e., accomplishes a great deal, achieves significant results, focuses on measureable outcomes):

<table>
<thead>
<tr>
<th>Delivers significantly less results than expected</th>
<th>Inconsistent in delivering results</th>
<th>Achieves the same level of results as most</th>
<th>Delivers more results than most</th>
<th>Consistently delivers exceptional results</th>
<th>Don't know</th>
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<tr>
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<td>0 4.80 1.30</td>
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</tbody>
</table>
Organizational Impact (Continued)

4. **Demonstrates Ethical Leadership** (i.e., behaves in an ethical manner, encourages ethical behavior in others, stands up for what is right, chooses the honorable course of action)

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</tbody>
</table>

MRG research indicates these LEA variables are generally related to this area of leadership effectiveness:

**Lower scores on:**
- Authority
- Self
- Restraint
- Conservative

**Higher scores on:**
- Strategic
- Management Focus
- Communication
- Excitement
- Technical
- Persuasive
- Control
- Production
Credibility With Management

5. Credibility with management and ability to inspire confidence with superiors (i.e., communicates well, delivers on promises, thinks in similar ways):

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<tbody>
<tr>
<td>Has little credibility</td>
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<td>Has good credibility</td>
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</table>

MRG research indicates these LEA variables are generally related to this area of leadership effectiveness:

- Lower scores on:
  - Outgoing

- Higher scores on:
  - Control
  - Strategic
  - Technical
  - Communication
  - Management Focus
  - Persuasive
  - Production

Credibility With Peers and Direct Reports

6. Credibility and ability to inspire confidence with peers and direct reports (i.e., is trusted and respected, delivers on promises):

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MRG research indicates these LEA variables are generally related to this area of leadership effectiveness:

- Lower scores on:
  - Authority
  - Dominant
  - Self

- Higher scores on:
  - Communication
  - Strategic
  - Technical
  - Control
  - Empathy
Leadership Coaching Report

Chris Williams
ABC Company
INTRODUCTION
This Leadership Coaching Report presents the assessment results and coaching suggestions for Chris Williams at ABC Company. It is based upon the completion of assessment instruments measuring motivation and approach to leadership. This report is organized into five sections:

Assets and Potential Challenges
Based on the assessment results, this section presents a narrative summary of assets as well as some of the potential challenges Chris Williams may encounter in fulfilling the responsibilities of the role.

Motivational Considerations
Based on the results of the motivational assessment, this section presents a description of some of the key aspects of this individual’s motivational profile.

Coaching Suggestions
This section presents several Coaching Suggestions that can be used to help Chris Williams develop in key areas of leadership.

Role Profile
Chris Williams completed the Leadership Effectiveness Analysis (LEA) questionnaire which measures how a person approaches the leadership role in terms of 22 characteristics. This section provides LEA results. This individual's scores on each of the 22 dimensions are shown by a "dot".

Job Match
This section summarizes the information presented in the LEA profile by listing those dimension scores which fall within the targeted role requirements range as well as those dimensions that fall below the targeted role requirements range.
Based on the profile for Chris Williams, the following characteristics are likely to contribute to potential effectiveness in the role:

1. Persuasive and convincing; likely to try to influence others’ points of view; uses language to build commitment for ideas; can be an effective advocate for ideas or initiatives

2. Keeps others enthused and engaged; builds emotional commitment; can be dramatic and inspiring; operates with energy and intensity; can inspire emotional expression in others

3. Assertive and competitive; pushes to achieve results; can be forceful in the face of obstacles; works well in a challenging environment; does not shy away from conflict or debate

4. Works hard and sets high standards for achievement for self and others; emphasizes the importance of being serious about goals; strong work ethic; ambitious and willing to work hard to achieve success

5. Very direct and straightforward; provides frank and direct feedback; let’s people know where they stand; quick to clear up ambiguity; does not shy away from delivering difficult messages

6. Takes own counsel; highly independent thinker; works well with autonomy; trusts own instincts; confident in own opinion; self-directed

7. Friendly, sociable and outgoing; has an easy and informal way with others; socially skilled; likes to establish a friendly atmosphere in teams; easy sense of humor; at ease in social situations

8. Persistent, follows-up; stays on top of tasks and goals until they are complete; strong follow-through efforts; keeps promises; not easily discouraged; will not give up easily; needs little external motivation for self-discipline

9. Responsive and supportive to those in positions of authority; will turn to more senior resources for direction, decisions and information; likely to be loyal to the organization; conscientious and generally willing to follow the organizational rules
POTENTIAL CHALLENGES

Based on the profile for Chris Williams, the following characteristics may potentially reduce performance and potential in the role:

1. Tendency to be less organized; less attentive to details; less systematic in work methods; can be too vague in providing guidelines; less careful in following procedures

2. Less emphasis placed on building and using expert knowledge; may not take the time to develop specialized skills; may be less effective when working with colleagues or customers who expect greater expertise; may risk not staying up-to-date in industry or area of expertise

3. May fail to review and learn from past practices; may take longer to learn from mistakes; may be less cautious regarding risk; may take less time to evaluate consequences; may be less attentive to upholding organizational traditions

4. Less focused on helping others; less willing to compromise; may not accommodate to support team goals; may pursue own priorities without considering the needs of the team; less likely to go along for the sake of harmony

5. Little effort invested to keep emotions in check; less likely to be reserved especially under stress or in a highly emotional situation; may sometimes say things that would be better left unsaid; may respond too quickly when waiting would be wiser

6. Hesitant to consider new ideas or approaches; less open to taking risks; less concerned with challenging outmoded assumptions and methods; less likely to respond as quickly in fast changing environments

7. Less attention to long-term implications of issues and actions; less time spent on analysis and planning; may be too reactive or too short-term focused; may not think ahead; may not anticipate problems or consequences

8. Less concerned with immediate responses and quick reactions; may be less attentive to the day-to-day activities; may have less of a sense of urgency; may tend to be less hands-on and sometimes generate somewhat impractical solutions

9. May come across as too aggressive and overbearing; may unnecessarily take an adversarial approach; may see too many things in terms of win/lose outcomes; may argue when discussion would be more constructive

10. May sometimes demonstrate more enthusiasm, emotion or energy than is useful in the situation; may be less effective when there is a need to be the calming influence in a situation; being constantly on the go may unintentionally create some degree of chaos
1. Strong emphasis placed on setting and achieving ambitious goals is further reinforced by a motivation to excel and to achieve at the highest levels.

2. A tendency to be highly independent minded and a preference for doing things on one’s own is further reinforced by a motivation for independence and for freedom from interference from others.

3. A persistent, tenacious approach to monitoring tasks and activities is further reinforced by a motivation for endurance and the demonstration of determination and willpower.

4. Drawn to innovation and seeking out new and different ideas and activities; enjoys creative pursuits; likes to engage with creative people; looks for new ways of doing things.

5. Motivated to be efficient, organized and focused on the details of the process; likes to create order out of chaos; attentive to administrative aspects; prefers at least some degree of rules and guidelines.

6. Enjoys looking for options and taking advantage of opportunities; energized by outmaneuvering an obstacle.

7. Likes intellectual stimulation and logical, analytical and investigative thinking; likes time to think through things thoroughly.

8. Strong appetite for setting and achieving ambitious goals; likes to push self and others to achieve at the highest levels.

9. Energized by being persistent and tenacious; values overcoming obstacles through willpower and endurance; takes pride in not giving up.

10. Gains satisfaction from being self-reliant and staying free of external controls on personal autonomy; prefers to operate independently and will likely chafe if there are many restricts or rules.

11. Values predictability, stability and a consistent environment; prefers a secure and steady rhythm with relatively few surprises.

12. Enjoys recognition, status and attaining a level of prominence and importance; seeks to be valued and respected; prefers to be in the inner circle or a member of an elite group.
COACHING SUGGESTIONS – TECHNICAL

Chris Williams scored lower on Technical, indicating somewhat less emphasis placed on being an expert in one's field. This may result in having less specialized knowledge than is ideal. This may reduce effectiveness when the role requires this individual to:

- Contribute strong knowledge and skill in a specialized area
- Train or educate colleagues and customers
- Instill confidence through expertise
- Stay up-to-date in profession

By first determining the context (situations, relationships, projects, etc.) where the expanded use of Technical will add value, experimenting with one or more of the following coaching suggestions will help Chris Williams become more effective in the use of Technical in the leadership role:

1. **Specifically define the area of specialized knowledge/expertise to be developed and shared** – In a world of information overload and complexity, it can be easy to become too diffuse in our thinking and professional development. Make time to define the area of expertise you want to invest your energy developing in yourself and sharing with others.

2. **Stay up-to-date in field of expertise** – Use education, reading, membership in professional organizations, engagement in social media, internet feeds, etc. to stay current in your chosen area of expertise. Build time into your schedule for these activities.

3. **Facilitate education sessions to share expertise with others** - Share your expertise with both colleagues and customers. Build your reputation for expertise by offering education to others through face-to-face, writing, and online offerings, etc.

4. **Respond to questions with specific, in-depth answers that demonstrate knowledge and expertise** – Take advantage of questions and requests from others to offer insights and knowledge in your area of expertise. Expand the time you are spending being an expert resource to others.

5. **Examine problems, opportunities and courses of action through the lens of expertise** – There are many ways to examine issues and opportunities, including the assessment of short term needs, strategic intent, timelines, resource allocations, etc. In addition to these and other factors, specifically make time to answer the question "How does my area of expertise add to or influence this situation?"
COACHING SUGGESTIONS – CONSERVATIVE

Chris Williams scored lower on Conservative, indicating somewhat less emphasis placed on being cautious and prudent in decision making. This may result in repeating past mistakes or being less careful than is ideal. This may reduce effectiveness when the role requires this individual to:

• Carefully manage risk
• Thoroughly evaluate alternatives to find a more cautious option
• Respect and repeat what has been done in the past
• Assess the limits and risks associated with change

By first determining the context (situations, relationships, projects, etc.) where the expanded use of Conservative will add value, experimenting with one or more of the following coaching suggestions will help Chris Williams become more effective in the use of Conservative in the leadership role:

1. Expand understanding of historical practices - Learn organizational and departmental history, understand what has been done before (both more and less successfully), and build a solid understanding of the values and beliefs that are important to the organization's history. When possible, align your actions and decisions to these historical practices and beliefs.

2. Expand understanding of lessons learned from the past - Take time to reflect on lessons learned from experience, incorporate these lessons into decisions and actions, and share the lessons you have learned with others.

3. Conduct more thorough assessments of risk - Take time to reflect on lessons learned from experience, incorporate these lessons into decisions and actions, and share the lessons you have learned with others.

4. Define the safer, more prudent alternatives - Asking questions such as: Can we do this at a slower pace? Is there an option that has less risk? Is there an alternative that does not involve as much change? will help define more cautious and moderate alternatives.

5. Thoroughly investigate before taking action - A leader employing the Conservative dimension carefully assesses all elements of what is needed to avoid risk or failure before moving forward. What are all the elements needed to be successful and avoid risk?

6. Use solutions that have been found to work in similar situations - the proven solution. The Conservative dimension is intended to support a cautious approach to moving forward.
The newer the course of action, the greater the unknown factors, the greater the chance of increased risk. Solutions that have worked in similar situations provide a more "tried and true" course of action.

7. **Test new ideas carefully before fully implementing** - Run simulations, focus groups, and pilot projects to test ideas before they are fully implemented. This helps to ensure that potential risks and problems are identified while the scope of the execution is still limited.
Motivation and Personal Growth

Report Samples
The Individual Directions Inventory™ (IDI) is a tool for personal and professional development that provides you with the opportunity to explore your motivations and preferences, examine how these have affected the choices you have made in different areas of your life, and consider what actions you might wish to take as you look toward your future. The IDI provides information about areas from which you are presently gaining satisfaction, as well as identifying areas which you may find less appealing. By helping you to understand the types of settings, roles and approaches that may hold the greatest interest for you, the IDI can be a useful tool in helping you to orient yourself in both your personal and professional worlds.

This report will provide you with personal feedback based on your responses to the Individual Directions Inventory™.

To help you understand your feedback, your scores have been compared to a large normative database of business and professional people who have completed the Individual Directions Inventory™. You will receive scores expressed in terms of percentiles. For example, if you have a score at 75%, then you scored higher than 75% and the same as or lower than 25% of people in the normative group. The specific norms that have been used in reporting your scores are:

Norm Group: North America n=13936 (Jan2012)

Presented By: Management Research Group, Inc™
Introduction

This report will provide you with individualized feedback on 17 specific dimensions which represent your personal Directions - the underlying directions you use to guide your life. This feedback is based on your responses to the Individual Directions Inventory (IDI).

An IDI Direction is a broad set of patterns or purposes that represents aspirations and motives. Our Directions may be satisfied or frustrated in many aspects of our lives; therefore, there are a variety of emotional experiences associated with them.

Our Directions represent our striving to achieve specific emotional goals in our lives. The way in which these goals are achieved may vary dramatically, depending upon the person. For example, a person whose primary direction in life is giving support and affection to others is very different from a person who finds this focus less appealing and prefers to be highly self-sufficient and free of outside interference.

The IDI Directions reflect a variety of internal processes: motives, needs, drives, and values. These are the source of much individual behavior. Our Directions differ from the methods we ordinarily employ to get what we want; they represent the strivings that we try to realize in our worlds. We then use the skills and insights we have developed to achieve the specific objectives that are related to these underlying Directions.

Depending upon the context in which they occur, our Directions:

- help us to create and build our unique worlds;
- describe the specific emotional content of our experiences;
- represent deep motivational patterns;
- help us to understand and predict our future behavior;
- represent the value we place upon people, places, things, ideas, goals, and activities;
- can affect the setting of future goals.

Think of your Directions as showing the direction and strength of the force with which you are likely to push against the world in order to achieve satisfaction. Some Directions will complement each other, while others will seem contradictory. When Directions are complementary, they tend to reinforce each other. When they are contradictory, they may cancel each other out or emerge as inconsistent behavior.

The following pages present your feedback scores on each of the 17 IDI Directions. In order to help you understand your feedback, the Directions have been organized into six groupings, or Clusters.
PERCEIVING

The two Directions grouped under Perceiving share the common objective of seeking to gain fulfillment through experiencing and understanding the world of thoughts, ideas and information. Individuals who score high on these Directions may perceive the world through a creative lens or a rational lens, or both. These Directions are not just methods of problem-solving. Each represents a vehicle for enjoying the world; each is an activity that is gratifying in and of itself. For example, engaging in the creative process is a satisfying act in its own right. It is also an activity in which one may or may not involve others. In fact, these two Directions are more independent of interpersonal elements than any of the other Directions, and they may include the activities of scientists, artists and many other people who enjoy creative and investigative pursuits.

The two Directions associated with Perceiving are:

CREATING

INTERPRETING
Creating

Gaining satisfaction from being imaginative and original and perceiving one's world in an innovative and creative manner.

Your Score: 55%

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Less drawn to pursuing new and imaginative ways of engaging with the world; less attracted to unconventional or creative experiences

Enjoy being innovative and seeking out new and different activities and people; value being involved in creative pursuits

Interpreting

Gaining satisfaction from seeking intellectual stimulation and perceiving one's world in a logical, analytical and non-emotional manner.

Your Score: 20%

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Less attracted to analytical thinking; may prefer to take things at face value; may prefer practical thinking or using your intuition

Drawn to thinking in a rational, logical way; like exercising your mind; enjoy investigating in order to thoroughly understand
The Directions associated with the Mastering Cluster all tend to revolve around one’s efforts to be successful in interacting with one’s environment. Whether these efforts involve striving to be the best, persisting against all odds, or being thorough, efficient and orderly, the common objective is to gain “mastery” over one’s world. Each of these Directions reflects an inward focus on the quality of one’s own efforts, although the influence of other Directions (i.e. those of the Affiliating or Challenging Clusters) may also direct this focus toward the efforts of others.

The three Directions associated with Mastering are:

- EXCELLING
- ENDURING
- STRUCTURING
### Excelling

Gaining satisfaction from constantly challenging oneself and pushing for the highest levels of achievement.

**Your Score:** 15%

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Less drawn to constantly pursuing the highest levels of achievement; may prefer to be selective in what you choose to master

Enjoy working toward ambitious goals; drawn to mastering whatever you undertake; like feeling that you are achieving at the highest levels

### Enduring

Gaining satisfaction from demonstrating persistence, determination and tenacity.

**Your Score:** 30%

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<th>Your Score:</th>
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Less attracted to showing stamina and endurance; may feel comfortable with the option of leaving something and trying alternatives

Enjoy showing persistence and tenacity; value overcoming obstacles through willpower and endurance

### Structuring

Gaining satisfaction from controlling one's environment through the use of organization, precision and thoroughness.

**Your Score:** 65%

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Less attracted to working in a precise, methodical manner; more comfortable with flexibility and disorder

Enjoy being efficient, organized and paying attention to detail; like creating order out of chaos
Your Strongest Directions

Entertaining: 95%

Your high score on the Direction of Entertaining suggests that you may have a great deal of interpersonal energy. You are oriented towards entertaining people and livening up their lives. You like being the center of attention. You are likely to gain a good deal of emotional satisfaction from causing others to laugh and be in a good humor, or even in teaching them something of value. You are well aware that information and social interaction have more impact when packaged in ways that stimulate others. In looking at the way this Direction interacts with other significant aspects of your profile, it is likely that:

- You enjoy situations in which you can help people and yet be dramatic and entertaining at the same time.
- You stimulate your need for people and their interest in you by keeping them amused and entertained.
- It is important for you to feel that you can make an impact on people and move them by dramatically expressing your feelings.
- You like settings in which people have fun and don't take themselves too seriously. You are not constantly trying to make sense of things - you don't really need or want everything to be logically spelled out.

Expressing: 85%

Your high score on the Direction of Expressing indicates that you feel it is important to share your feelings with others. You are likely to enjoy situations in which you can be highly spontaneous and allow your emotions to show. You may feel that expressing your emotions is an important aspect of your relationships with others. You have strong ideas about communicating your feelings in a personal way, and do not apologize for the fact that you are emotionally expressive. In looking at the way this Direction interacts with other significant aspects of your profile, it is likely that:

- You prefer environments where you can show how you really feel without being constrained by group rules and expectations.
- You enjoy being in settings where your natural liveliness and spontaneity will be appreciated and affirmed.
- You feel happiest when you can give your emotions free rein. You don't tend to analyze your feelings; things may make emotional sense to you without necessarily being logical.
- Your openness in expressing your feelings will make it easier for people to provide you with the support and help you desire.
Your Lowest Directions

**Belonging: 5%**

Potential Benefits:
- You may feel freer to do what you want, rather than feeling that you have to conform to the norms, codes or expectations of a particular group.
- You may be less vulnerable to having your feelings hurt if you are not asked to join or are not included in group activities.
- Because you stand apart, you may be spared from experiencing the emotional turmoil or suffering that a group may be going through.
- You may find it easier to leave a group or an organization when it no longer meets your needs.

Potential Drawbacks:
- It may be more difficult for you to operate in an environment which is highly team-oriented.
- You may limit your influence with certain people because they see you as standing apart and being unwilling to join their group.
- You may feel frustrated or impatient if you believe that you could accomplish things faster or more efficiently on your own, yet have to wait for the group to catch up with you.
- You may find that you sometimes feel lonely or isolated from others when you are not a part of the group.

**Excelling: 15%**

Potential Benefits:
- You may have clearer limits on the level of achievement you are willing to pursue; you are not constantly driven by internal demands to set and strive for ever higher goals.
- You may feel freer to engage in a number of activities without feeling that you have to achieve a high level of mastery in each one.
- You may find it easier to balance your drive for achievement with other parts of your life; you may have the potential to relax more and enjoy life.

Potential Drawbacks:
- You may feel uncomfortable or frustrated in settings where the people around you are constantly raising the level of expectations they have of you.
- You may find that you are accomplishing less than you could because you have not set your standards high enough.
- You sometimes may not get the recognition you deserve for your efforts because the people around you expect an even higher level of performance.
EXPLORING YOUR FEEDBACK

You now have had the opportunity to review your Individual Directions Inventory™ feedback. The purpose of this section is to help you to gain a better sense of how your Directions influence the way you engage with your world. You will examine how your Directions interact, as well as how you may be acting in ways that are consistent or inconsistent with your Directions. Having a better understanding of your underlying Directions will help you to make decisions and choices that bring you satisfaction, and to be more conscious of the way your decisions and choices affect your personal and professional development and effectiveness.

Remember that high or low scores are only significant to the extent that they help you to understand how you may gain more satisfaction from your life or relieve frustration and disappointment. They have nothing to do with what you “should be” or that others want you to be, although they may give you hints as to why others react to you in certain ways.
Exploring the Directions

As you review your profile, consider what each Direction means to you in relationship to your effectiveness in your world and your professional role, and how it relates to and interacts with the other Directions in your profile. For each Direction, use any or all of the following questions to help you explore your feedback:

- How does your score on this Direction help you get what you want in your world and your professional role?
- How does your score on this Direction hinder you from getting what you want in your world and your professional role?
- Describe yourself using this Direction. For example, under what specific circumstances do you gain the greatest satisfaction from this Direction? When you are most drawn to this Direction, what people, events and activities are involved?
- Is there a strong relationship between your score on this Direction and other Directions in your profile? Describe the interactions among these Directions.
- What else do you know about yourself that either supports or contradicts your score on this Direction?

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<thead>
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<th>Direction</th>
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Personal Directions®

Presented to:

Chris Williams
ABC Company

Presented By: Management Research Group, Inc™
Introduction

Welcome to Personal Directions®!

Personal Directions® is a program of personal development that provides you with the opportunity to explore your motivations and strivings, examine how these have affected the choices you have made in different areas of your life, and consider what actions you might wish to take as you look toward your future.

This report will provide you with individualized personal feedback based on your responses to the Personal Directions questionnaire. This questionnaire consists of three components: Individual Directions Inventory™, Appraise Your World™ and World Outcomes™. The information you will receive as feedback will, we hope, prove valuable to you in reviewing where you are at this particular time in your life.

This program does not assume that there is some overwhelming reason for changing your life. Rather, it provides a summary of some important areas of your personal world and your reactions to them, together with suggestions for ways to increase the amount of satisfaction you could be experiencing.

To help you understand your feedback, your scores have been compared to a large normative database of people who are similar to you - professionals, managers, people with comparable educational backgrounds, of the same gender, etc. You will receive scores expressed in terms of percentiles. For example, if you have a score at 75%, then you scored higher than 75% and the same as or lower than 25% of people in the normative group. The specific norms that have been used in reporting your scores are:

North America - Male n=3051 (Jan2012)

The purposes of the Personal Directions program are to:

- Provide you with feedback on how you see yourself in a number of significant areas of your life;
- Provide information about areas from which you are presently gaining satisfaction;
- Suggest to you some ideas about settings and roles that might hold the greatest interest for you;
- Establish a structure that you can use to create strategies for reaching your goals and objectives within the context of what you have already accomplished.

We hope that this process will be of benefit to you, whether you undertake substantial changes in your life, make small revisions in your thinking or activities, or merely reinforce what you already have.

We hope this program will supply you with opportunities for further life enrichment for you and those who are closest to you.

Good luck on your journey!
Your Strongest Directions

Creating: 99%

Your high score on the Direction of Creating suggests that you not only like to come up with innovative ideas, you also like to see yourself leading a creative life. You enjoy being around stimulating and offbeat people. You value jobs and activities which give you the opportunity to think creatively and do new things, and you may feel very frustrated if major areas of your world do not allow you to be innovative. You are likely to see creativity as a way of fulfilling yourself in your larger life. In looking at the way this Direction interacts with other significant aspects of your profile, it is likely that:

- You enjoy challenges which allow you to be innovative, but you do not want to feel constrained by group opinion. When it comes to your own creativity, you are not really interested in participating in a team process.

- You enjoy the creative process, and you tend to approach it in a highly efficient and organized way. When working on a new idea, you pay attention to all the details.

- You like to keep your options open and seem to have great resources in figuring out creative ways to position yourself most successfully.

- You enjoy the stimulation of being around creative processes and people; however, you tend to avoid acting in ostentatious ways - you try not to be considered a show-off.

Structuring: 99%

Your high score on the Direction of Structuring suggests that you feel best when you can ensure that things are organized and orderly. You enjoy paying attention to the details, and you tend to be efficient and thorough in your approach to your world. You may become upset when things are chaotic or messy; to the extent that it is possible, you are likely to want everything to be perfect. You like having a well-ordered world with understood rules and guidelines. In looking at the way this Direction interacts with other significant aspects of your profile, it is likely that:

- You enjoy environments which allow you to look at issues in a fresh way, but which still have a system and a set of expectations to work within.

- You like roles that take advantage of your talent for organization and concern for detail, but do not require you to be dramatic in any way.

- With your desire to do an excellent job on anything you undertake and your willingness to attend to the smallest detail, you take pride in being a true perfectionist.

- You are likely to enjoy and do well in roles and activities which require strong analytical skills and highly structured approaches to problem solving.
Your Lowest Directions

**Belonging: 5%**

Potential Benefits:
- You may feel freer to do what you want, rather than feeling that you have to conform to the norms, codes or expectations of a particular group.
- You may be less vulnerable to having your feelings hurt if you are not asked to join or are not included in group activities.
- Because you stand apart, you may be spared from experiencing the emotional turmoil or suffering that a group may be going through.
- You may find it easier to leave a group or an organization when it no longer meets your needs.

Potential Drawbacks:
- It may be more difficult for you to operate in an environment which is highly team-oriented.
- You may limit your influence with certain people because they see you as standing apart and being unwilling to join their group.
- You may feel frustrated or impatient if you believe that you could accomplish things faster or more efficiently on your own, yet have to wait for the group to catch up with you.
- You may find that you sometimes feel lonely or isolated from others when you are not a part of the group.

**Entertaining: 10%**

Potential Benefits:
- You may be at your best in settings that require working behind the scenes, accomplishing results without calling a lot of attention to yourself.
- You may be less subject to the control or influence of others because you are not trying to get them to react to your bids for attention.
- You may reduce the risk of feeling uncomfortable or awkward if your efforts to entertain were not appreciated.
- You are less likely to feel disappointed when you are not the center of attention.

Potential Drawbacks:
- It may be more difficult for you to operate in settings where you are constantly in front of people (i.e. as a presenter, or in high profile positions).
- You may limit the impact you make in certain situations where it might be advantageous to be amusing or dramatic.
- You may not get the credit you really deserve because you pay less attention to making sure others notice you and your accomplishments.
- You may reduce your effectiveness in transmitting important information to others because you pay less attention to the way you present it.
Recreation:
The degree of emphasis placed on values, beliefs, interests, behaviors and desires associated with enjoying recreational diversions and having fun.

Travel:
The degree of emphasis placed on values, beliefs, interests, behaviors and desires associated with exploring new and different places and cultures.

Nature:
The degree of emphasis placed on values, beliefs, interests, behaviors and desires associated with being involved in the natural world and outdoor activities.

Palate:
The degree of emphasis placed on values, beliefs, interests, behaviors and desires associated with enjoying fine food and drink.

Arts:
The degree of emphasis placed on values, beliefs, interests, behaviors and desires associated with enjoying and experiencing the arts.
The Meaning of High and Low Scores

The Meaning of Higher Scores

Highly developed sectors (75% and above) are usually those in which we have invested the most. More often than not, there is an emotional charge related to these sectors - they have given us the greatest satisfaction, and we value them the most. However, we are also at our most vulnerable within these sectors because they hold the greatest potential for frustration and disappointment. The more we value some person, thing, place or idea, the more we would feel its loss.

In a very real way, we invest more of ourselves in our highly developed sectors. Accordingly, they must contain a number of aspects that are important to us. They may:

- **Satisfy needs:** As a result of our choices, each of us has found certain sectors to be more gratifying than others. We may have experienced more success in them.

- **Represent competencies:** We may emphasize certain sectors because we have developed a high level of skill and effectiveness in performing activities associated with these sectors.

- **Define responsibilities:** We may emphasize particular sectors because of certain expectations that are placed on us. We ourselves may generate these expectations, or they may be placed upon us by external sources such as family, friends, and society.

- **Reflect opportunities:** We may develop in certain sectors because we have had many opportunities to do so. We may neglect to develop in other sectors because we have not been exposed to their associated activities.

- **Demonstrate habits:** We may emphasize certain sectors because we have always done so, and there has been no reason to challenge development in them.

- **Embody values:** Certain sectors may be well developed because they reflect our deepest values.

The Meaning of Lower Scores

Sectors in which you receive a score of 25% or lower are receiving relatively little of your attention at this particular point in time. Your investment in these areas is minimal; they do not have the same emotional charge as those in which you scored higher. They may be poorly developed because of a lack of opportunity or interest. They may be areas that do not appeal to you right now, or areas where you have developed few skills. In certain cases they may even be areas that you are avoiding or rejecting for some reason.

Less developed sectors, however, may also be viewed as possible areas of growth and satisfaction. They may represent future resources for you, waiting on the periphery of your attention.

The following pages contain more detailed information about the sectors in which you received the highest and lowest scores.
Your Less Developed Sectors

Romance: 5%
Individuals who score high on Romance tend to place a great deal of emphasis upon the importance of having a romantic relationship in their lives. They may also have a romantic bias in life, seeing the world in a romantic light. Your lower score may indicate that you see yourself as a realist. You may view events, issues and relationships in concrete and practical terms. You prefer to see things as they are rather than looking to an idealized version of what they could be.

You may wish to consider the potential benefits that might be gained from placing more emphasis in this sector:

- Gaining a tremendous sense of affirmation and optimism
- Having the opportunity to learn about someone in depth
- Being introduced to new people and activities through your partner
- Finding a source of creativity and adventure
- Having a chance to develop intimacy

Travel: 10%
Individuals who score high on Travel like to go places. They enjoy exploring that which is different. Your lower score on this sector may indicate that you find excitement and adventure in your own backyard rather than in far-off places. You may find stimulation and growth in other pursuits, preferring to spend your spare time in other activities such as sports or games, attending concerts, reading, or socializing with friends.

You may wish to consider the potential benefits that might be gained from placing more emphasis in this sector:

- Seeing more of the world and learning about other people and cultures
- Gaining a sense of history and having the opportunity to examine your own values
- Learning or renewing an appreciation for your own heritage
- Finding a source of new ideas, customs and foods
- Gaining new friends, perspectives and values
2. In which areas do your sectors (high, mid-range or low) and Directions (high, mid-range or low) complement each other?

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3. Are there sectors of your world which place demands on you that are in conflict with your Directions (high, mid-range or low)?

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4. In which sectors (high, mid-range or low) might there be additional opportunities to satisfy your strongest Directions?

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Achieving Satisfaction

Regardless of where you place your energy and emphasis in life, each of the sectors of your world contains the potential for providing a wide range of experiences - from fulfilling to frustrating. The particular pattern of your world may have a strong effect upon two major emotional results - satisfaction and security. The level of satisfaction and security you are currently experiencing may be very significant in assessing how you feel about your world. It is up to you, however, to judge what level of satisfaction or security is appropriate for you.

Satisfaction tends to be as elusive in definition as it is in experience. It is often a great deal easier to point out what makes us unhappy than happy. The concept of "pursuit of happiness" seems to imply some definite thing that we actively pursue. It seems much more likely, however, that happiness is not a concrete goal we can reach but, rather, an emotional state created by the process of working toward concrete goals.

Through the years, each of us chooses those facets of our lives that bring the most meaning and/or satisfaction. We may develop the skills and competencies to play a variety of roles in each sector of our lives. Skills tend to be gained not only through persistent attempts at mastery, but also through the positive feelings that mastery brings. Indeed, the part that positive emotions can play over the long run in terms of total world fulfillment probably cannot be overemphasized. For example, one may decide to develop certain skills and enjoy each small experience of mastery on the way to the larger goal. The process of mastering skills can be highly satisfying to us in and of itself.

As a result of the choices we make, we each experience some degree of satisfaction or frustration, stability or lack of security. On the following pages, you will receive feedback indicating the degree of satisfaction and security you are presently experiencing in the world you have created.
Satisfaction

The dimensions of Satisfaction and Dissatisfaction are independent variables designed to measure the extent to which there are elements in your world that you experience as fulfilling, satisfying and happy, and the extent to which there are elements in your world that you experience as frustrating, negative and/or incomplete.

**Satisfaction** measures the active feelings of happiness that individuals are gaining from their worlds. **Higher scores** are associated with people who generally feel that the worlds they have created are very fulfilling and satisfying. **Lower scores** do not necessarily reflect unhappiness or actively negative feelings about one's world; rather, they suggest that there may be relatively few elements that are producing feelings of joy, happiness and deep satisfaction.

**Dissatisfaction** measures the active feelings of dissatisfaction that individuals are experiencing within their worlds. **Higher scores** are associated with individuals who are currently experiencing their worlds, or elements within their worlds, as incomplete, frustrating, unfulfilling and/or negative. **Lower scores** suggest that there are relatively few elements in one's world that are causing negative feelings, frustration or unhappiness.

The degree to which you feel that aspects of your world may be:
- Incomplete
- Frustrating
- Unfulfilling
- Unpleasant

The degree to which you feel that aspects of your world may be:
- Fulfilling
- Pleasurable
- A source of happiness
- Satisfying

Consider the combination of your scores on Satisfaction and Dissatisfaction:

**High Satisfaction/Low Dissatisfaction**: Active feelings of happiness, fulfillment and satisfaction about one's world, with relatively few elements that produce feelings of frustration or unhappiness.

**High Satisfaction/High Dissatisfaction**: May reflect a world with many elements that produce happiness and satisfaction, but also many elements causing negative feelings and/or frustration.

**Low Satisfaction/Low Dissatisfaction**: May reflect a world with relatively few active feelings of either happiness or frustration. May be an indication that one has not designed or analyzed one's world in terms of satisfaction and dissatisfaction, but has built a world around another focus (such as responsibility).

**Low Satisfaction/High Dissatisfaction**: May reflect a world with many elements that cause feelings of frustration and dissatisfaction and relatively few feelings of happiness, fulfillment and satisfaction.
## Where Are Your Opportunities?

1. In what way do you want your World Outcomes to change?

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<thead>
<tr>
<th>World Outcome</th>
<th>More</th>
<th>Less</th>
<th>Same amount, but different content</th>
<th>Keep &quot;as is&quot;</th>
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<tbody>
<tr>
<td>Satisfaction</td>
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<td>Growth</td>
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<td>Public Success</td>
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2. In the space below, write a list of areas/elements in your world that you feel might help fulfill the World Outcomes objective(s) you have chosen.

**Objective** (Satisfaction, Security, Growth, Balance, Present Support, Flexibility or Public Success):

Areas/Elements of Your World:

3. Which Directions (high, mid-range or low) might help you achieve your World Outcomes objectives? How?

4. Which Directions (high, mid-range or low) might hinder your efforts to achieve your World Outcomes objectives? How?
Section V: Setting Goals

Introduction

In this section, you will bring everything together in order to focus your efforts and strategies, either to change certain aspects of your life that you feel are unsatisfactory, or to add new areas of richness and stimulation to what you already have.

If you are highly satisfied with your life at the present time, you might want to explore whether there are new areas you would like to develop or things you may be overlooking that could be more positive. If you are not satisfied, you may want to develop or alter areas of life that you have already identified as causing a problem. Sometimes, surprisingly minor changes may make a big difference in the degree of satisfaction one receives. Other times, more dramatic changes may be necessary.

In this section, you will have the opportunity to pinpoint not only what may need to be changed, but also what objectives are necessary to achieve a more satisfying life.

It is wise not to try to set too many objectives at once, in case we lose focus and find ourselves unable to reach practical outcomes. Sometimes, we may feel like throwing everything away and making a completely new start - usually, however, this is neither practical nor likely to work. Rather, we want to build on our efforts so far in life in order to achieve even greater fulfillment and the goals we desire.
Setting a Goal

One of the easiest ways to change your life is to change certain elements of your world. The sectors of your world can be seen as the components of a larger system. When a change occurs in any sector, the reverberations are felt elsewhere. Because the sectors are interconnected, a change in any one of them affects all the rest in some way. Refocusing your energy in one sector will have consequences in others. The following pages will help you anticipate those consequences and determine whether or not they are positive for you.

An action plan is only as good as the results it achieves. If the plan is developmental in nature, it implies change. To ensure that action and change lead to the desired results, several components are essential:

- A goal that is truly meaningful to you
- A clear image of the destination
- Knowledge of the steps necessary to reach that destination
- Anticipation of the obstacles (internal/external and past/present)
- A stated and firm commitment to the outcome

In order to give yourself the best chance of completing the change process, you must define goals and be very clear about your desired results. These need to be very concrete and real for you. Thus, the first step is fully exploring possible goals and their implications.

Selecting a Tentative Goal

Review pages 31, 39, 42 and 46, and choose an area you would like to focus upon. In this area, is there a goal you would be willing to work toward? Consider the following questions as you select your goal:

- Can you state this goal in very specific terms?
- Is this goal a realistic one for you to accomplish?
- Can you accomplish it in a set period of time?
- Do you have a strong commitment to this goal?

Once you have chosen your goal, use the following guidelines in articulating it:

- Make the statement a positive one. Instead of saying, "I no longer want to." or "I will not.", begin your statement by saying, "I will."
- State your goal strongly. "I want" is much less definitive than "I will or "I shall." In fact, you may even find it helpful to state the goal as if it were already accomplished.

In the space provided below, state the goal you have selected in specific and concrete terms.

_______________________________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________
Chris Williams
ABC Company

**Action Planning**

Describe the actions you will take to achieve this goal and, where possible, assign a completion date.

________________________________________________________________________________________________

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To whom will you communicate this goal? Why, and how?

________________________________________________________________________________________________

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________________________________________________________________________________________________
Salesforce Effectiveness

Report Samples
Sales
Performance Assessment

SPA Candidate Report

Chris Williams
ABC Company
Introduction
The SPA Candidate Assessment presents the results of a sales assessment on Chris Williams as part of a candidate selection process for a sales role at ABC Company. This report is organized into four sections:

Sales Profile
This individual completed the Sales Performance Assessment (SPA) questionnaire which measures how a person approaches the sales role in terms of 24 characteristics. This section provides this individual’s SPA results against the role requirements of the position. This individual’s scores on each of the 24 dimensions are shown by a “dot”. The role requirements for the position are shown by a shaded range.

Job Match
This section summarizes the information presented in the SPA profile by listing those sales dimension scores which fall within the targeted role requirements range as well as those dimensions that fall below the targeted role requirements range.

Assets and Potential Challenges
Based on this individual’s SPA profile, this section presents a narrative summary of this candidate’s assets in the sales role as well as some of the potential challenges the candidate may encounter in fulfilling the responsibilities of the role.

Interview Questions
This section presents several interview questions that can be used to further explore this candidate’s sales profile and approach to sales in more depth.

Caution:
This SPA Candidate Assessment should be considered as only one component of the sales selection process. In reviewing the results of this assessment it is extremely important to consider all factors when evaluating this candidate including:

• Prior Work History
• Job Interviews
• Relevant Life Experiences
• Education
• References
• Other Job Relevant Information
Assets

Based on the sales profile of Chris Williams, the following characteristics are likely to contribute to potential effectiveness as a sales professional:

1. Spontaneous, enthusiastic energy; pays attention to the emotional dimensions of the sales process; keeps people enthusiastic and engaged; builds commitment for products/services and the company through excitement.

2. Forceful approach to sales; pays close attention to closing the sale; competitive and energized by winning; can be successful in handling the difficult sale; not afraid to ask for the order.

3. Loyal team player in the company; follows the company’s agenda; supports the company; good at following company sales plans and policies; attentive to home office relationships; sells what the company can support; unlikely to overpromise; represents the company well.

4. Open and clear customer communication; emphasizes the importance of keeping customers well informed; educates the customer; ensures customers have all their information needs met; develops customer loyalty

5. Strongly motivated by financial and material incentives; drawn to material rewards; responds well to financial incentives; likely to be more motivated by a highly leveraged compensation plan.

6. Takes pride in having extensive product knowledge; has an in-depth understanding of how the products/services work and how they can meet customer needs; will be comfortable with challenging questions; customers who appreciate understanding the details of a product or service will value this individual’s expertise.

7. Friendly, accepting and informal with customers; focuses on the interpersonal aspects of selling; gregarious, affable and has an easy way with people; often turns customers into friends.

8. Takes a long term planning and incisive thinking approach to sales; comfortable tackling tough problems; prefers to take a planned, logical approach to selling and building business.
Potential Challenges

Based on the sales profile of Chris Williams, the following characteristics may potentially reduce performance and potential as a sales professional:

1. May be less insightful about people and their motivations; may not read people accurately; may miss changes in customers’ moods and sometimes miss important subtleties; may not see customers as unique individuals and may sometimes rely on a more uniform, one-size-fits-all approach to sales.

2. May not be attentive enough to customer's support needs; may at times come across as too self-serving; may not make time to establish relationships with customers; may appear to be less concerned with customer's wellbeing.

3. May be too limited in ideas; may be more comfortable with the status quo; can sometimes miss opportunities by being too limited in focus; not always as ambitious or skilled at negotiating; may tend to follow the company sales formula too strictly to generate business in some circumstances.

4. May not always be focused enough on ambitious goals; may become discouraged in challenging sales situations; may believe that challenging goals are unattainable or require sacrifices that are too significant.

5. May not be focused enough on serving the customer; may have a more utilitarian view of the customer as merely a sale; may be too focused on short term sales objectives over building long term customer relationships; may miss the opportunity to gather valuable customer insights to share with the company; may jeopardize the potential for repeat business.

6. May give up too easily; may not be as disciplined with follow-through; may have trouble staying focused during long sales cycles; may be more attracted by the new opportunity than managing the existing opportunities; may start strong but lose momentum.

7. Unlikely to view the sales role, the company or the products in an idealistic way; may be too expedient; may fail to take a stand on issues; may be inclined to tell the truth attractively and be distrusted by some customers as a result.
INTERVIEW QUESTIONS – Entrepreneurship

Chris Williams scored low on Entrepreneurship indicating less emphasis placed on being creative, independent or risk oriented. This may result in this person being very invested in the status quo, and potentially more cautious and dependent on the home office than is ideal. This may reduce this person’s effectiveness when the sales role requires this individual to:

• Be creative and open to new ideas
• Demonstrate independence in thinking and action
• Take initiative to pursue new opportunities
• Be bold in taking risks to achieve ambitious results

Use one or more of the following interview questions to explore the orientation Chris Williams has towards Entrepreneurship:

1. Please give me some recent examples of innovative approaches you have taken to sales.

2. Have you been able to develop any unique applications for the product line that you represent? Please give some examples.

3. How open is your current company to ideas and suggestions from the field force about different ways in which things might be done? (If company is open:) please give examples of how suggestions of yours have been utilized. (If company is not open:) what ideas have you been able to use on your own without having to involve the company?

4. To what extent have you been able to open up present customers to business beyond what they were doing before?

5. Please give an example where being more independent minded in your sales role helped you win an important sale.

6. Please give an example of where not taking a risk lost you a sales opportunity. In hindsight, how would you have changed your approach?

NOTES:
Welcome to the Sales Performance Assessment™! The Sales Performance Assessment (SPA) is a powerful process of personal development designed to provide feedback to you on 24 sales practices, based on your own perspective of how you approach your sales role.

To help you understand the degree to which you are currently using these 24 sales practices, your scores were compared to a large sample of salespeople who have completed the Sales Performance Assessment™ Self Questionnaire. Your scores are expressed in terms of percentiles based on this norm group. Thus, a score of 75% implies that you scored higher than 75% of salespeople in the normative sample (and, conversely, that you scored the same as or lower than 25% of these salespeople). The specific norms that have been used are:

Norm Group: North America n=12063 (Jan2012)

Presented by: Management Research Group, Inc™
WHAT THIS REPORT CONTAINS:
REPORT FLOW CHART

INTRODUCTION
Orientation to questionnaire purpose & feedback

SUMMARY PROFILE
See all your scores at a glance

UNDERSTANDING THE SALES PRACTICE
Expanded information on Sales Functions & Sales Practices

EXPLORING YOUR FEEDBACK
Interpreting your profile using combinations of Sales Practices

ESTABLISHING PRIORITIES FOR SUCCESS
Examine which sales practices are critical for your role at your organization

TAKING ACTION ON YOUR GOALS
Use your feedback to create an action plan
Introduction

The Sales Performance Assessment™ (SPA) is based on the principle that your development is substantially assisted by your own insight. The SPA Development Report provides you with feedback on the practices or behaviors that need to be sustained, strengthened or modified to enhance your sales effectiveness, and the motivations or drivers that characterize your unique approach to your sales role.

The attitude you have toward feedback will strongly influence the benefit of this report. Please keep the following advice in mind:

- **Use the information as a developmental aid.** Avoid viewing your feedback as the final word on your performance; instead, use it to help plan tactics and strategies to enhance your future effectiveness.

- **Your feedback profile identifies both behaviors and drivers.** Behaviors can be changed, and drivers can be understood and used to leverage performance and enhance personal satisfaction; thus, **you have control** over the factors that can help you reach maximum effectiveness as a professional salesperson.

- **Trust the feedback profile's description of your approach to the sales role.** The SPA Self Questionnaire is a proven, professional instrument that shows how individuals actually behave in sales roles.

- **Do not view high scores as "good" and low scores as "bad."** A given sales orientation is rarely all positive or all negative. For example, a high score on Empathy indicates sensitivity to and concern for other people. Alternatively, the strongly empathetic salesperson may run the risk of becoming too close to customers, perhaps losing objectivity and having difficulty dealing with conflict.

- **Recognize that the aim of the Sales Performance Assessment™ process is to help you achieve your goal of increased sales effectiveness.** Your development as a professional salesperson will be enhanced through (1) recognizing your strengths, weaknesses and motivations, and (2) designing strategies to enhance strengths, address weaknesses, and use your motivations to your advantage.

The following page presents the profile of your scores on the 24 sales practices measured by the Sales Performance Assessment™.
Understanding the Sales Practices

The following pages provide a detailed description of each of the sales practices measured in your profile. These descriptions will help you to gain a better understanding of your approach to sales, as well as its strengths and limitations.

Profile Elements

Please keep the following information in mind as you proceed through this section of your report:

Your scores represent your own perspective. Each feedback scale shows your score as a percentile, and provides brief descriptions of the behaviors that characterize both high and low scores. Also included are a list of Potential Assets and Potential Liabilities associated with both high and low scores, in order to provide you with more interpretive information on each of the sales practices. Each page of this section also presents the opportunity for you to consider the importance of the sales practice in your current sales role, and to make notes or comments.
PREPARATION

It requires preparation and planning to target and capture new markets - as well as to keep pace with existing ones. Customers, products and competitors are constantly changing. It is a challenge for every salesperson to search for, find and use the appropriate information to plan his or her sales efforts.

Salespeople need to have more than just market awareness and information, however. They need to know their products and services - their solutions. Some products do not require great technical sophistication, while others do. In certain situations, the lack of such technical knowledge may be the crucial reason one loses a sale.

Thinking about and planning a sales approach also requires some degree of strategy and analysis. Sales professionals have a finite amount of time and energy to expend; therefore, they must structure and organize their efforts.

Channeling energy into generating leads and finding prospects is a critical factor for achieving success for many sales professionals. Prospecting may also require some ingenuity and risk taking in order to find new ways to go after markets and potential customers.

Successful sales professionals know the value of being prepared and keeping one's market and prospects clearly in sight as the sales process unfolds.

The six Sales Practices associated with Preparation are:

MARKET AWARENESS
TECHNICAL
STRATEGIC
STRUCTURE
PROSPECTING
ENTREPRENEURSHIP
Market Awareness

Understanding market trends and analyzing customer buying patterns.

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Your Score: 50%

Less attentive to market trends

Stays on top of market trends

This sales practice measures the degree to which salespeople emphasize the importance of being in touch with market trends, as well as knowing as much information as possible about customer buying patterns. People who score high on Market Awareness take an analytical approach to the market. They believe in seeking and using any information available to them, including that supplied by market research. They take pride in knowing what is going on in the marketplace.

Salespeople who score low do not take this analytical approach to understanding the market. They may go into the field and take their chances with what they find. They may be skeptical of how much can be foretold, as opposed to discovered through direct experience.

**LOWER SCORES:**

**Potential Assets**
- May be more practical than theoretical
- May depend upon personality power
- May be good at personalizing a sales approach
- May be highly intuitive and instinctive

**Potential Liabilities**
- Not up-to-date on market trends
- Shallow understanding of the market
- May be at a disadvantage with highly knowledgeable customers
- May use obsolete information

**HIGHER SCORES:**

**Potential Assets**
- Studies market systematically
- Understands customers' buying patterns
- Knows what competitors are doing
- Finds opportunities
- Explains trends to the customer

**Potential Liabilities**
- Can over-analyze the market
- May be too busy studying to take action
- May miss business implications
- May know theory but not people
- May have difficulty converting knowledge into sales

How important is this behavior in your current sales role?

Comments:

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

10
CONTACTING

Once prepared with product, market and customer knowledge, it is necessary to make contact and begin the process of producing sales.

This part of the sales process requires making a good first impression on the customer. Salespeople need to feel reasonably comfortable in meeting new people and establishing contact with them. Whether the contact is made in person or with the aid of technology, there are often numerous obstacles to bypass in order to get to the "right" person and make the appropriate impact.

Many sales processes rely on building excitement about the value of the product or service and its potential for meeting the needs of the customer. This may imply having good business instincts, providing sufficient information, and presenting a solution in a convincing manner.

How much emotion, persuasion and information is used may vary depending on the sales situation, but the success of the sale is greatly influenced by the quality of the sales person's behaviors at the point of customer contact.

The six Sales Practices associated with Contacting are:

- COMMUNICATION
- OUTGOING
- OPTIMISTIC
- EXCITEMENT
- PERSUASIVE
- INSIGHT
Insight

Perceptive in reading people and situations, and adept at using this knowledge to determine customers' needs and identify sales opportunities.

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Your Score: 5%

Less attentive to reading people and opportunities
Perceptive; looks beneath the surface

Salespeople who score high on Insight feel that they are adept at reading people and situations. They will adapt to customer needs, and they have an instinct for what to say. These individuals quickly recognize when opinions or options have shifted, and they respond with corresponding shifts of their own. They are very alert to clues and cues in situations, and use this information to create a positive outcome.

Salespeople who score low do not emphasize the importance of insight in their sales work. Their sales situations may be much more straightforward and may not require interpreting interpersonal nuances. They may depend upon structured, analytical approaches rather than attempting to read people and situations.

**LOWER SCORES:**
Potential Assets
- May take things at face value
- May be more straightforward, direct
- May spend more time gathering information and building knowledge

**Potential Liabilities**
- May not understand customers' motivations and underlying needs; may solve the wrong problem
- May be taken advantage of
- May have difficulty adapting to changing situations
- May miss changes in customers' moods and important subtleties

**HIGHER SCORES:**
Potential Assets
- Effective reader of non-verbal cues
- Able to change approach easily
- Able to gauge appropriate timing
- Quickly recognizes new opportunities

**Potential Liabilities**
- May react too quickly
- May misread people or situations
- May miss long-term implications
- May neglect structure and detail

How important is this behavior in your current sales role?

High  Medium  Low

Comments:
Sales can be a uniquely satisfying role. The salesperson is often on the leading edge of change: nothing happens unless something is sold. The rewards are there as well. These rewards come in many forms, from pride in being a sales professional, to delight in making lots of money, to great satisfaction from closing a particularly difficult account.

In sales, there can be tremendous rewards, but also tremendous competitive pressures. The long-term management of these pressures is extremely important for a salesperson's emotional well-being. Thus it becomes acutely important for the professional salesperson to be able to use the rewards of sales to build a positive defense against the inevitable disappointments.

What each of us considers a reward is shaped by the pattern of our underlying motivations. Some motivations appeal to us strongly, others to a moderate degree, and others do not move us at all. Our strongest motivations are likely to be especially significant and meaningful to us, and may well act as driving forces in our career and larger life.

These strong drivers may be used as vehicles for increasing our success and satisfaction in our field. We may design an approach to the job that will enlist these drivers and use them to our advantage. We may also de-emphasize certain aspects of the job which are inconsistent with our strongest drivers.

Of course, there will always be certain aspects of reality that modify and limit our actions to some extent. It is vital, however, that we not focus solely on these potentially limiting realities. We are more in charge of our own destiny than we sometimes realize.

The six Sales Practices associated with Drivers are:

SALES FOCUS
MANAGEMENT FOCUS
CUSTOMER FOCUS
MATERIALISM
EGO REWARDS
IDEALISM
Sales Focus

Identifying with and taking pride in the sales role, and having a strong commitment to selling and the sales profession.

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Your Score: 55%

Less interest in sales as a profession

Strong interest in being a sales professional

High scores on Sales Focus are associated with individuals who have a strong identification with the role of salesperson. They are proud of the sales field and believe in it. Often they do not mind being called a salesperson even if this is not their official title. They have a strong commitment to selling.

Low scores are associated with individuals who may be effective in sales but often see it as a stepping stone to something else (management, for example), or a necessary aspect of their true profession (consultant, technical specialist, etc.) They do not have a strong identification with selling as a career.

**LOWER SCORES:**

**Potential Assets**
- May feel comfortable in many roles
- May view sales more in terms of problem solving
- May get others to work for him/her

**Potential Liabilities**
- May not be well prepared to sell
- May not enjoy sales
- May see sales strictly as a step to another role

**HIGHER SCORES:**

**Potential Assets**
- Identified with the sales role - Confident in sales work
- Likely to enjoy all aspects of selling
- Willing to devote energy to selling
- Takes selling and sales role seriously

**Potential Liabilities**
- May be less motivated by non-sales aspects of the role
- May want to do everything him/herself
- May be seen as too narrowly focused on sales

How important is this behavior in your current sales role?

Comments:
Your Perceptions

The following summary presents the major interpretive points suggested by your feedback data. As you read these statements, you may wish to check or highlight those you agree represent significant aspects of your sales approach, or those you would like to explore further and perhaps discuss with others who have observed your sales approach: your boss, your peers, or a coach. In your approach to your sales role, you describe yourself as:

**Preparation**

- Preferring to focus efforts on being part of a team and an organization rather than taking an innovative, independent approach to the sales role.
- Presenting in-depth product knowledge and expertise in a forceful and direct manner.
- Constantly looking for any occasion to add new customers to the base; willing to give a sales pitch at the slightest opportunity, and using emotional intensity to create excitement and enthusiasm for it.
- Energetic, enthusiastic, and comfortable working in a fast-moving environment, but also careful to pay attention to planning strategies and thinking through the implications.
- Making a lot of sales calls but less likely to qualify them; sometimes failing to recognize when a prospect is not really a good potential customer.

**Contacting**

- Projecting enthusiasm to customers without monitoring their reactions; capable of delivering upbeat sales messages, but unlikely to recognize quickly enough when these are not working with a particular person.
- Enthusiastic and assertive; likely to be forceful in interactions with others, but running the risk of being viewed as exerting high pressure and possibly as being almost overpowering.
- Direct and forceful in a sales interview; less attuned to the reactions of customers, possibly missing the subtle cues that would indicate when a less assertive approach should be used.
- Putting a lot of emotional intensity into communications; likely to draw favorable reactions from people by providing ample information in a dramatic fashion, but also likely to sometimes overwhelm others with information.
- Fully informing customers about what is going on, but not always recognizing when to stop talking; less attentive to signals from the audience which indicate that they have heard enough.
Sales Performance Assessment

Strategic Directions Profile

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<th>Category</th>
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<tr>
<td>Preparation</td>
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<tr>
<td>Market Awareness</td>
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<tr>
<td>Technical</td>
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<tr>
<td>Strategic</td>
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<tr>
<td>Structure</td>
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<tr>
<td>Prospecting</td>
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<td>Entrepreneurship</td>
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<td>Contacting</td>
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<tr>
<td>Communication</td>
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<td>Outgoing</td>
<td>75%</td>
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<td>Optimistic</td>
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<td>Excitement</td>
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<td>Persuasive</td>
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<td>Insight</td>
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<td>Implementation</td>
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<tr>
<td>Aggressiveness</td>
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<td>Tactical</td>
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<tr>
<td>Empathy</td>
<td>10%</td>
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<tr>
<td>Team Player</td>
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<td>Persistence</td>
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<td>Production</td>
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<td>Drivers</td>
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<td>Sales Focus</td>
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<td>Management Focus</td>
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<td>Customer Focus</td>
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<td>Materialism</td>
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<td>Ego Rewards</td>
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<td>Idealism</td>
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</table>
Goal-directed action planning is the hallmark of sales success. This section will assist you in creating a personal development plan you can use to attain your goals.

You have now determined which sales practices are most important for you to develop. Your time is valuable, so allocate it carefully. You are likely to accomplish more by concentrating on one or two of the most significant developmental opportunities rather than working on too many issues at once.

Choose TWO or THREE sales practices that you feel are the most important for you to address. In making your choices, refer to your Bottom Line worksheet on page 48, as well as the work you did in Establishing Priorities for Success.

Taking Action on Your Goals

Tools for Action Planning

1. **S.M.A.R.T. guidelines**: In order to be effective, an action plan must be:
   - S  Specific
   - M  Measurable
   - A  Action oriented
   - R  Realistic
   - T  Time-bound

2. **Action Planning Tips**: The following page lists some helpful tips for creating dynamic and achievable action plans.

3. **Action Planning Guides**: This section includes worksheets for creating specific goal-oriented action plans associated with each of your developmental opportunities.
Action Planning Guide #1

1. **Developmental Opportunity:**

2. Restate the Developmental Opportunity as a Developmental Goal. What are the objectives of this developmental activity? What specific changes are you looking to make?

3. What specific action steps will you undertake to achieve this goal?
   - **Action Step:**
   - **Target Completion Date:**

4. Are there major obstacles to overcome or additional resources needed in order to achieve this developmental goal?

5. How could your strong sales drivers be used to support your efforts to achieve this developmental goal?
   - **Strategy:**
   - **Sales Drivers:**

6. Date to review your progress toward this goal:

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51