

CP360

Report designed for

**Sally Sample**

## Checkpoint 360° Competency Feedback System™ Management Comparison Report

Report Prepared: December 23, 2010

**CONFIDENTIAL**

Previous Survey Completed: May 5, 2010

This report includes responses from:

Self, 1 Boss, 3 Direct Reports, and 4 Peers

Boss – Leader, Lester

.....  
Current Survey Completed: December 20, 2010

This report includes responses from:

Self, 1 Boss, 2 Direct Reports, and 2 Peers

Boss – Leader, Lester

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## The CheckPoint 360° System

The purpose of the *Checkpoint 360°* System is to identify leadership as viewed by certain groups of individuals who know and have had the opportunity to observe the manager in the work setting. This is accomplished with the collection of ratings from different sets of observers: **Self** (Sally Sample), **Boss** (you), **Direct Reports**, and **Peers**.

There are 70 leadership behaviors presented as survey items. These 70 items are grouped into 18 Skill Sets which further group into 8 Universal Management Competencies. Each rater reports their experience of observing the manager with a rating on each of the items.

In the 70 CheckPoint survey items the raters chose between six possible choices. Based on their observations they indicated the percentage of time they felt the manager displayed each behavior. The sixth choice was "No Opportunity," which was selected when the rater had no opportunity to observe the listed behavior and thus could not provide a meaningful response. These six possible responses were:

Rating	Description	Percentage of Time
1	Almost Never	0 - 10%
2	Seldom	11 - 39%
3	Sometimes	40 - 60%
4	Usually	61 - 89%
5	Almost Always	90 - 100%
N	No opportunity	to observe this behavior

There are 18 Skill Sets that are critical for success in most supervisory positions. They are grouped into 8 Universal Management Competencies. When a manager frequently displays certain behaviors which are a part of these Management Competencies, they are typically identified as effective and successful managers.

The 8 Universal Management Competencies and their 18 Skill Sets are listed below.

**1. Communication**

- Listens To Others
- Processes Information
- Communicates Effectively

**2. Leadership**

- Instills Trust
- Provides Direction
- Delegates Responsibility

**3. Adaptability**

- Adjusts to Circumstances
- Thinks Creatively

**4. Relationships**

- Builds Personal Relationships
- Facilitates Team Success

**5. Task Management**

- Works Efficiently
- Works Competently

**6. Production**

- Takes Action
- Achieves Results

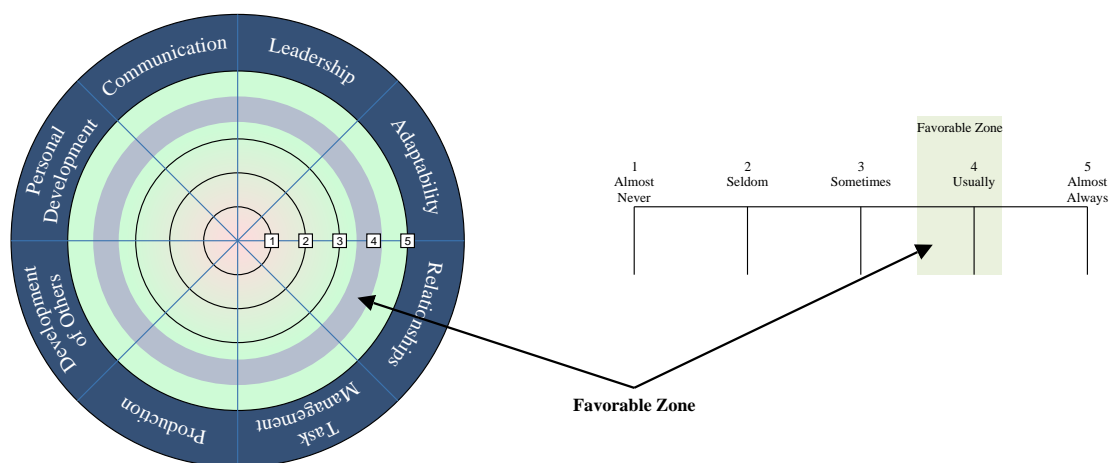
**7. Development Of Others**

- Cultivates Individual Talents
- Motivates Successfully

**8. Personal Development**

- Displays Commitment
- Seeks Improvement

**Favorable Zone:** The Favorable Zone was identified by analysis of the data from a wide range of industries and organizations. This analysis showed that on the *CheckPoint 360°* those managers who had been identified as "good managers" by their respective company typically achieved an average rating of 3.5 to 4.25 when rated by others who knew the manager's work behavior. This established the range of scores for the Favorable Zone on the *CheckPoint 360°*.



## Introduction to the Comparison Report

This report summarizes the results of the CheckPoint surveys that the manager (**Sally Sample**) and the respondent groups (**Boss, Direct Reports, and Peers**) recently completed and the survey that the manager and respondent groups (**Boss, Direct Reports, and Peers**) previously completed. The scores the manager received are presented in graphs and numeric scales on the pages that follow.

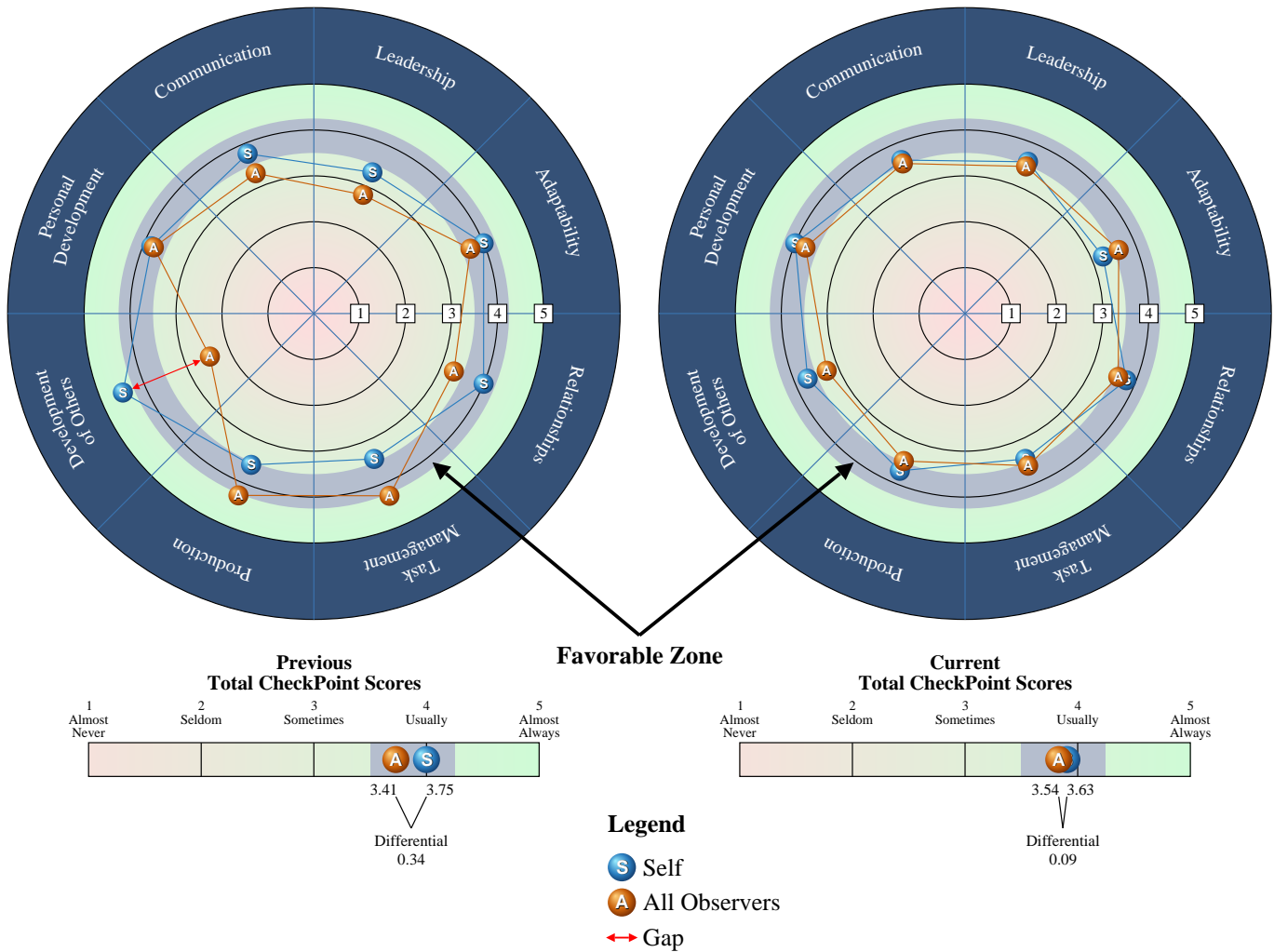
Feedback is reported in the following sections:

- **Executive Competency Overview**: Results for the 8 Universal Management Competencies, comparing the average **Self** (manager) score with the average score of **All Observers** (includes **Boss, Direct Reports, and Peers**) and showing whether scores fall within, above, or below the Favorable Zone. Also shown is the Total CheckPoint Scores, including the score differential between **Self** and **All Observers**.
- **Executive Skill Set Summary**: Overview of the 18 Skill Sets as rated by **All Observers**. The average ratings are displayed ranked from highest to lowest of the most recent scores providing you an overview of the relative strengths or challenges Sally Sample may have in these Skill Sets.
- **Critical Skills Alignment Summary**: Overview of the Skill Sets identified as critical by **Boss** and/or **Self**.
- **Executive Summary**: Results for the 8 Universal Management Competencies, comparing the average scores of all respondent groups (includes **Self, Boss, Direct Reports, Peers, and All Observers**), providing Total CheckPoint Scores for each group, and pointing out group score averages that vary by more than 1 point.
- **Skill Set Analysis**: Results for the 18 Skill Sets, comparing the average scores of all respondent groups (includes **Self, Boss, Direct Reports, Peers, and All Observers**), and pointing out group score averages that vary by 1.5 points or more, as well as analyzing Critical Skill Sets to establish Talents, areas needing Focus, and areas where a significant GAP exists between **Self** and **Boss** scores. (Sally Sample and you each chose 6 Critical Skill Sets out of 18. These were considered critically important to the manager's particular job requirements.)
- **Respondent Group Comparison**: Results for the 18 Skill Sets and Total CheckPoint Scores, analyzing the average scores of each respondent group (includes **Self, Boss, Direct Reports, and Peers**).

- **Survey Summary of the 70 items** : Results for all 70 survey items, displaying the average scores for **Self, Boss, and All Observers** (includes **Boss, Direct Reports, and Peers**) and highlighting the items that fall in a Critical Skill Set, as well as flagging items where responses lack consensus (varying by three or more points) within a respondent group for a given survey.
- **Development Summary Overview**: Describes your strengths and development needs for the 18 Skill Sets.
- **Coaching & Management Considerations**: Provides suggestions for using the information in the Management Comparison Report to help the manager grow and develop in the job.
- **Areas of Focus**: Describes the strengths and development needs for the 3 most critical Skill Sets and provides guidelines and suggestions for a Leadership Development plan for this manager.

As you review this material, keep in mind that most people exhibit a range of abilities. No one does everything equally well. Approached as a learning tool, this feedback can be a valuable first step toward helping the manager increase effectiveness on the job. Of particular interest in many sections will be the ability to compare the results from the two different CheckPoint surveys. Where a difference between the two average ratings exceeds 1 point there will be an indication with an icon (⚠).

## Executive Competency Overview



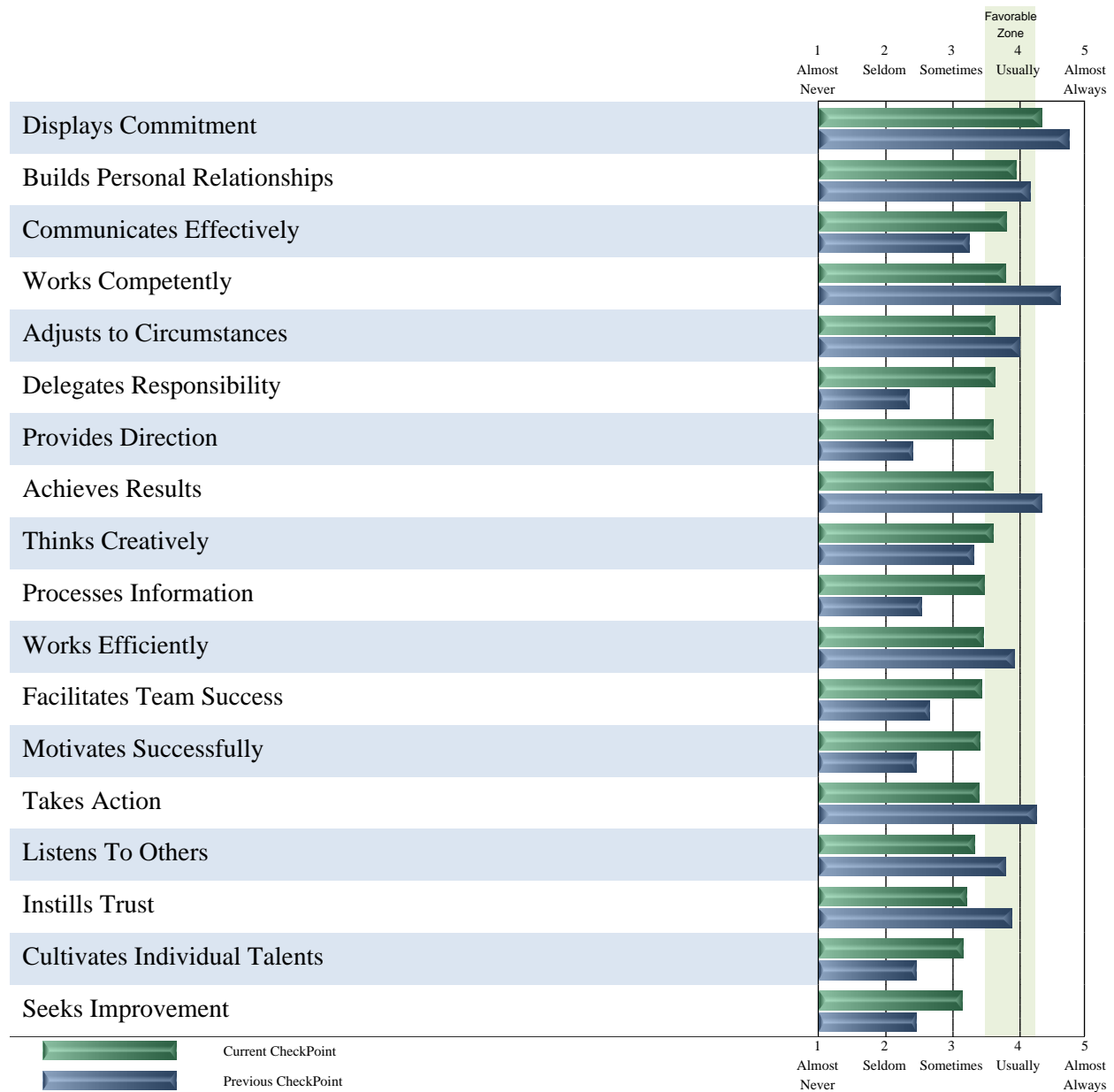
This is an overview of **Self's** rating compared to the average rating of **All Observers** (every rater except **Self**). As the **Self** (S) marker and the **All** (A) marker move away from the center of the circle, the scores are higher. Note particularly where there is a gap of 1 point or greater. This would suggest a significant difference between the manager's perception and that of the other observers as to how often Sally Sample displays that management competency.

*Total CheckPoint Scores* reported on the smaller horizontal graph present the average score for all 8 Competencies for both the manager (Sally Sample) and **All Observers**. If the difference between these two averages is 1 point or more, the perception the manager has of the behavior varies a great deal from the other raters. This would suggest a need for a greater self-awareness in the manager.

The following sections show the details of variance between the results from both CheckPoint survey rating periods.

## Executive Skill Set Summary

The graph below shows the average ratings of **All Observers** (ratings from everyone except **Self**) for each Skill set. The average ratings for both CheckPoint surveys are displayed and ranked from the highest to lowest based on the most recent survey. This provides you with an overview of the relative strengths Sally Sample shows in these Skill Sets. While we suggest the manager focus on the most critical Skill Sets shown in the next sections of this report, it is useful for you to have an overview of the ratings the manager received on all Skill Sets. Also, note if there is any significant variances between the two CheckPoint survey results sets.



## Critical Skills Alignment Summary

Both you and Sally Sample identified the 6 Skill Sets that you each thought were most critical for success in the manager's job. These Skill Sets for both CheckPoints are displayed below. Consider that the possible number of Skill Sets selected by both you and the manager can range from 6 to 12. If you both select the same 6 Skill Sets you will have 100% alignment. When you did not agree on any of the Skill Sets as most critical, there is 0% alignment. As the alignment percentage decreases, it becomes even more important for you and the manager to discuss and clarify the most important aspects of the manager's work. If you each look at different behaviors as most important, then the focus of the manager may be very different from where you expect the focus to be. Also, look for any variance in which Critical Skill Sets were selected for each CheckPoint survey. This could reflect a change in focus between the dates of the two surveys.

### Previous

#### Critical Skills Alignment

**B** Lester Leader - 50%

### Current

#### Critical Skills Alignment

**B** Lester Leader - 33%

**S** **Processes Information:** Gets to the point. Evaluates the pros and cons, as well as the short and long-range consequences, of decisions. Develops logical, clear conclusions.

**B** **Communicates Effectively:** Expresses self clearly, both in writing and in speaking. Is thorough, yet concise, and is consistently straightforward. Readily shares information with others.

**B** **Provides Direction:** Establishes clear expectations and a manageable workload. Plans the steps required to accomplish objectives, while keeping focus on overall vision.

**S** **Delegates Responsibility:** Delegates appropriate jobs to appropriate people. Empowers others to work and solve problems on their own.

**S** **Adjusts to Circumstances:** Can adjust to people's diverse work styles and to varying environments. Deals with setbacks constructively and anticipates change.

**Thinks Creatively:** Brings an imaginative approach to the job, inspiring innovation, risk-taking, and creative problem-solving.

**S** **Facilitates Team Success:** Resolves conflicts fairly in a spirit of cooperation. Builds consensus and leads team in setting appropriate goals. Recruits effectively and uses talents of group wisely.

**Works Efficiently:** Makes efficient use of current technology and wise use of outside resources. Avoids procrastination and sets priorities.

**Works Competently:** Has mastered the fundamentals of the job. Can quickly and competently apply new methods and new information to appropriate tasks.

**S** **Achieves Results:** Overcomes obstacles to achieve results that set high standards for others and that positively impact the organization.

**Cultivates Individual Talents:** Is an effective coach and makes training available. Provides objective performance feedback on a timely basis.



**Previous**

**Current**

**Critical Skills Alignment**

**Critical Skills Alignment**

**B** Lester Leader - 50%

Lester Leader - 33% **B**

**S** **Displays Commitment:** Maintains a high level of energy, perseveres and remains positive.

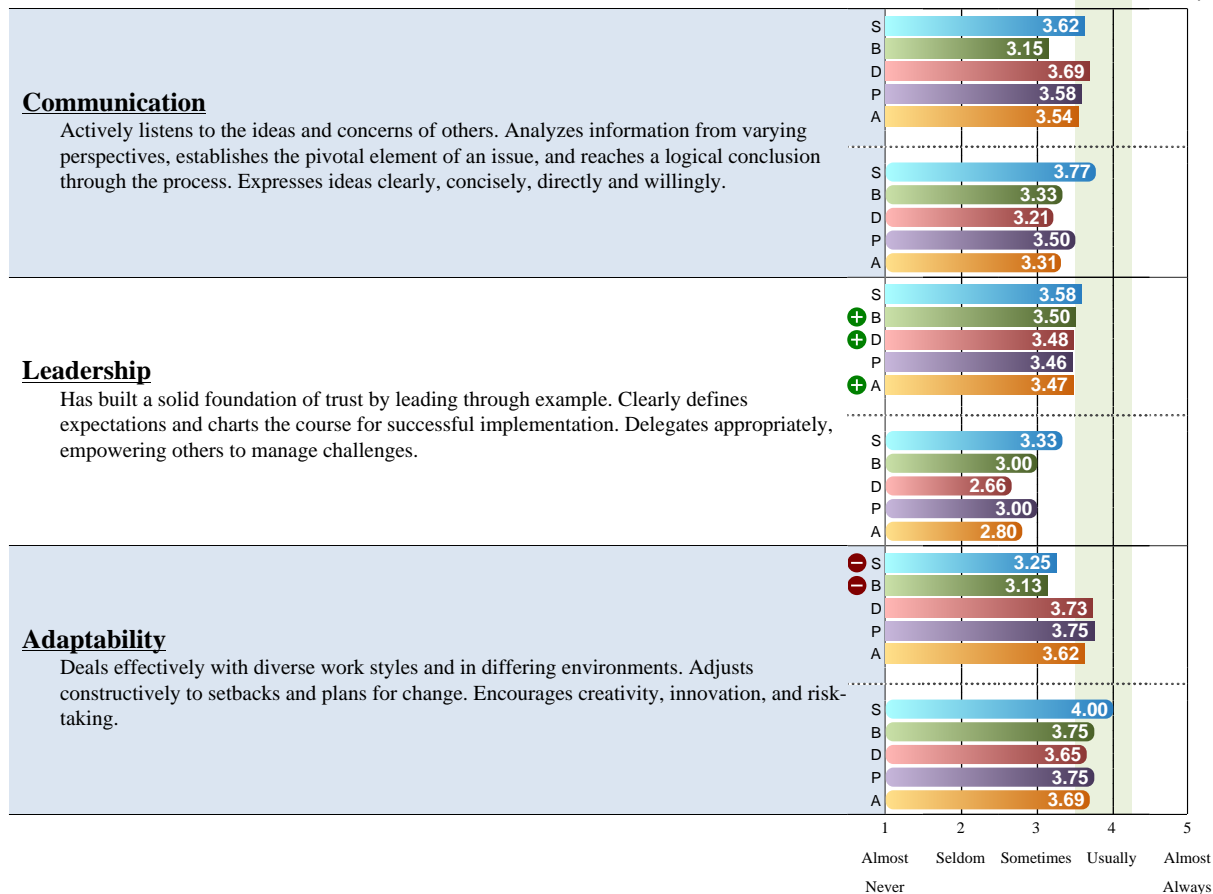
**S**

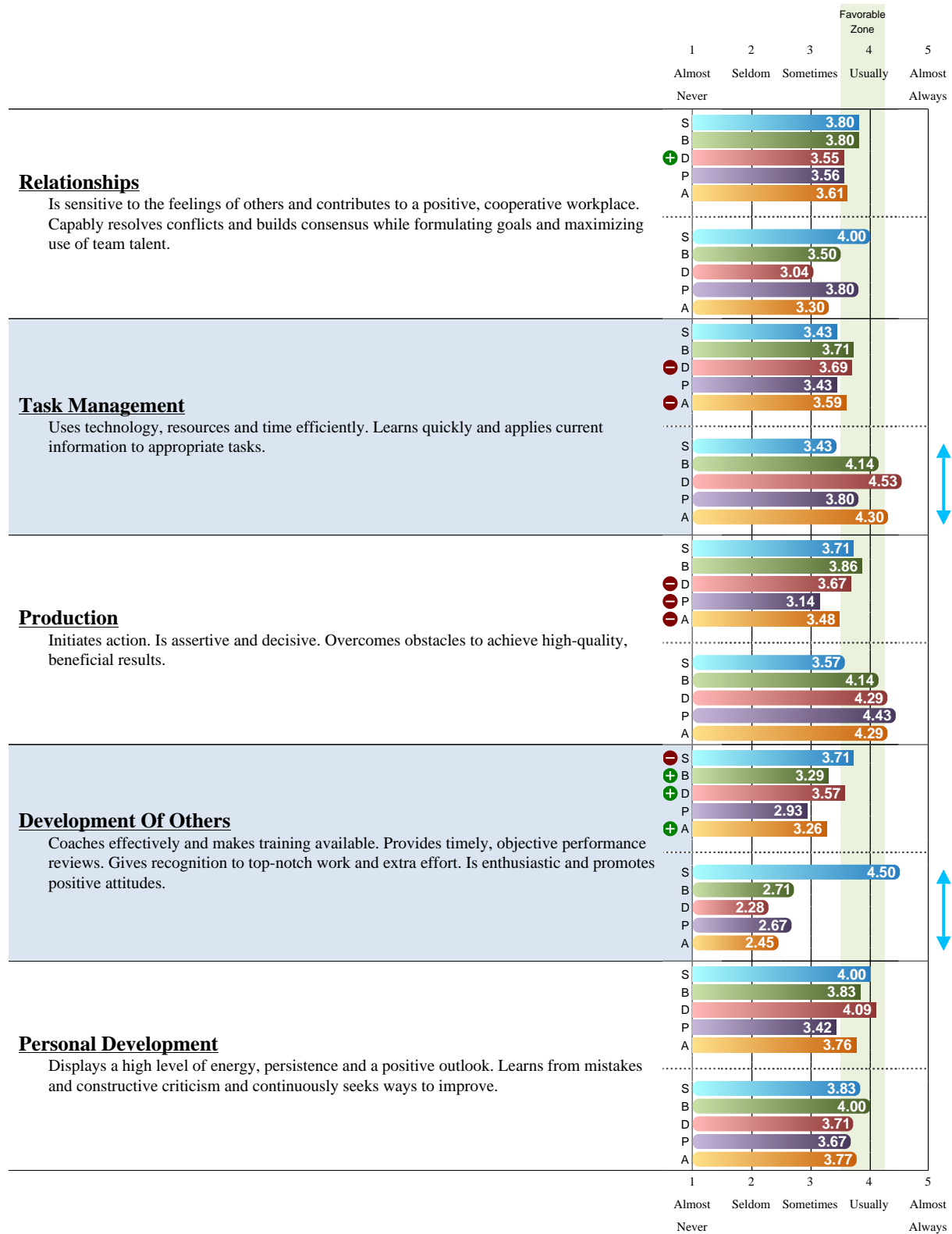
**B** **Seeks Improvement:** Learns positive lessons from mistakes and constructive criticism. Pursues resources to improve and develop professionally. Sets no limits on personal potential.

## Executive Summary

The average rating for each Respondent Group for the 8 Management Competencies is presented in this section for both CheckPoint surveys. The numbers shown for **Self** (Sally Sample) and **Boss** (you) are the actual ratings. Note the difference between group ratings for each survey, especially where there is a caution indicated (a difference of greater than 1 point) between **All Observers** for each survey. Additionally, note that when the current survey average ratings for a group differed by .5 or more, there is a **+** or **-** to indicate the direction of that change.

- +** Indicates a .5 or greater increase in average rating since the previous rating period.
- Indicates a .5 or greater decrease in average rating since the previous rating period.
- !** Indicates a greater than 1 point rating difference in All Observers between CheckPoint surveys.





## Skill Set Analysis

Any differences between the Critical Skill Sets selected by **Boss** (you) and **Self** (the manager) are of particular interest. Such differences suggest important differences between the expectations of the **Boss** and the focus of the **Self**. Again, notice any **+** or **-** icons indicating a significant difference between rating periods. Any of these differences should be a subject of discussion between you and Sally Sample.

Notice the definitions for each Skill Set are provided along with the average score for each group of raters. These average scores for each group and the relationship of each score when compared to the others should be considered carefully. You may see a vertical arrow which will indicate the presence of a gap of 1.5 or more points between two respondent groups in that year.

**↑↓** Any difference between respondent groups where averages vary by 1.5 points or more.

**↔** A Critical Skill Set, according to **Self** or **Boss**, and both **Self** and **Boss** score averages differ by 1.5 points or more.

**S**  
**B** Ratings for Self and Boss

**Talent** A Critical Skill Set, according to **Self** or **Boss**, and both **Self** and **Boss** score averages are equal to or higher than 3.5

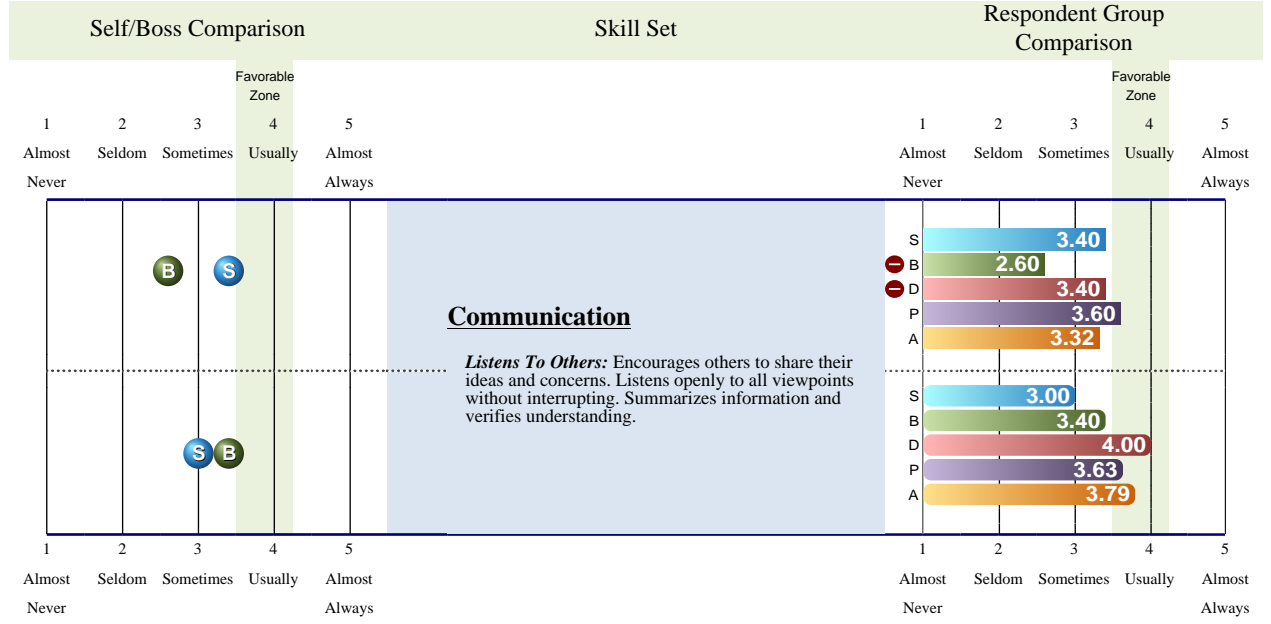
**Focus** A Critical Skill Set, according to **Self** or **Boss**, and both **Self** and **Boss** score averages below 3.5

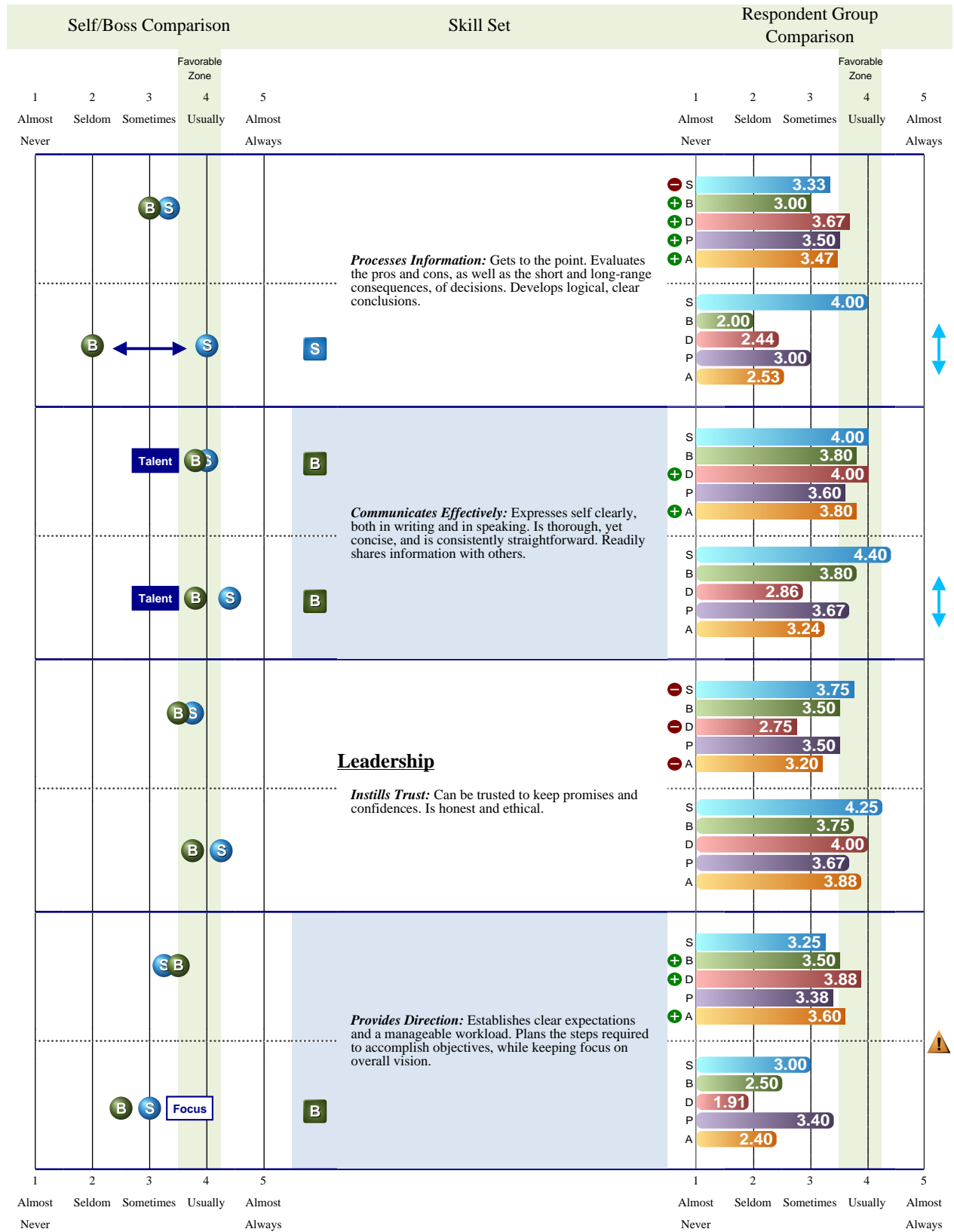
**!** Indicates a greater than 1 point rating difference in All Observers between CheckPoint surveys.

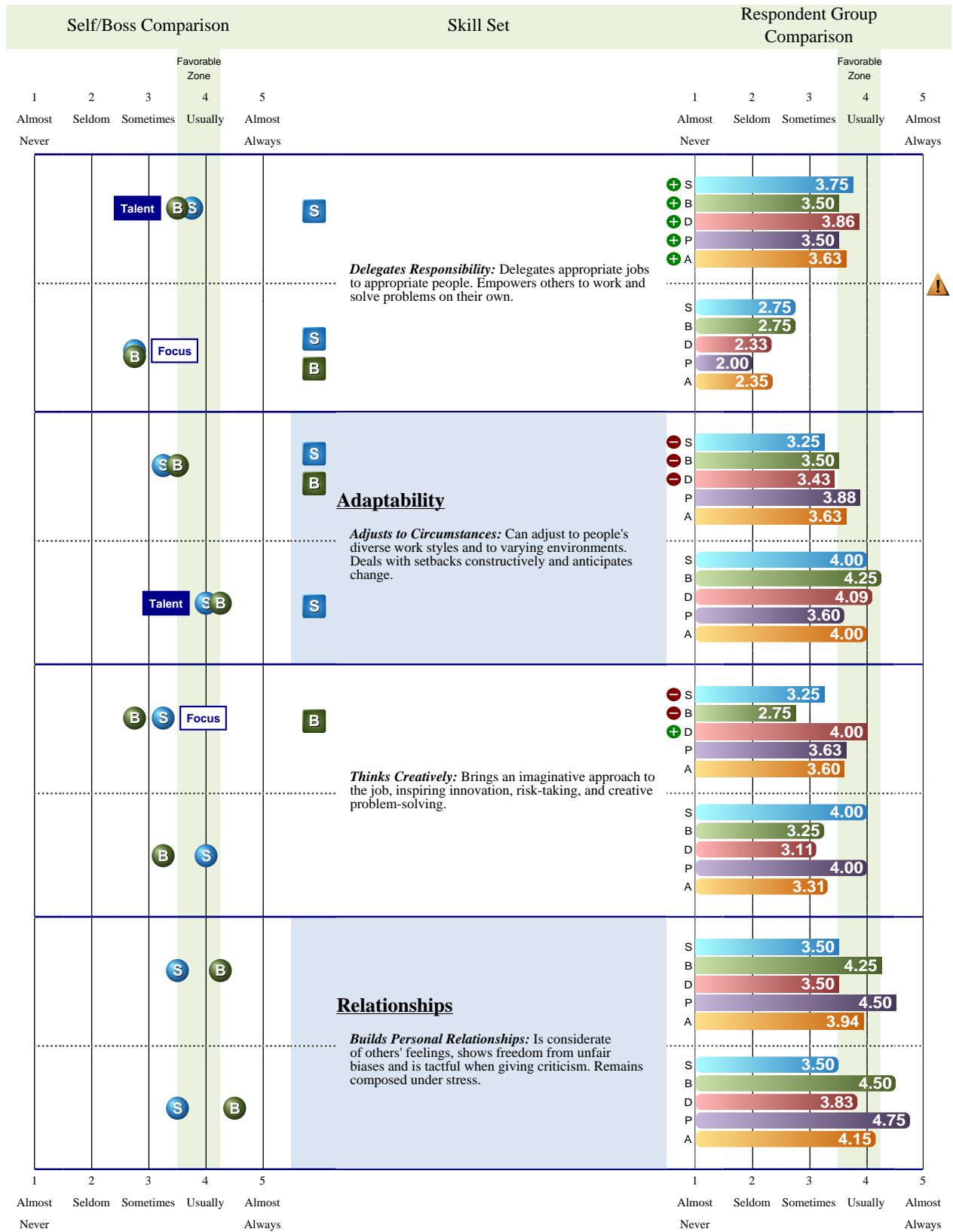
**S**  
**B** Selected by Self, Boss, or Self & Boss as a Critical Skill Set.

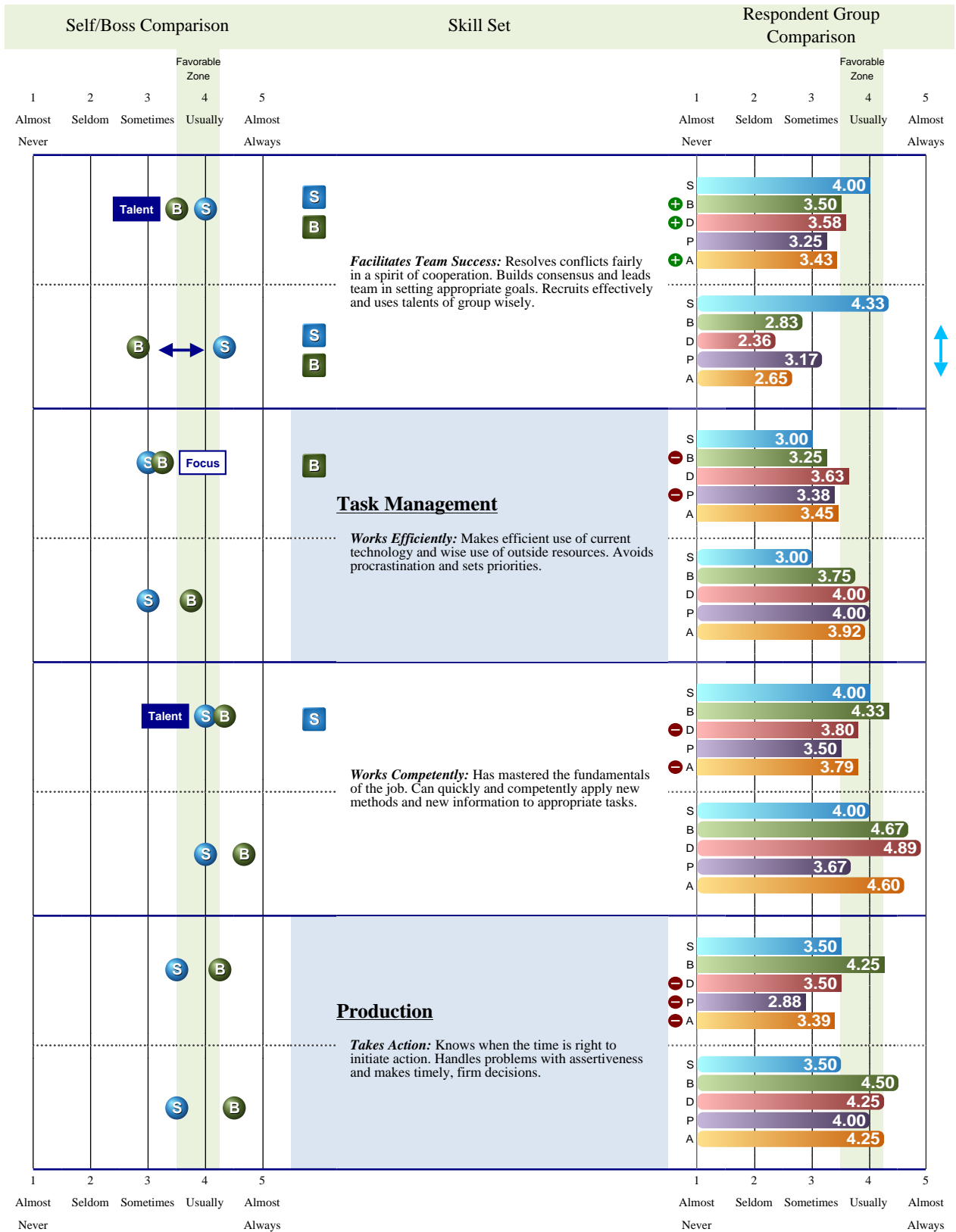
**+** Indicates a .5 or greater increase in average rating since the previous rating period.

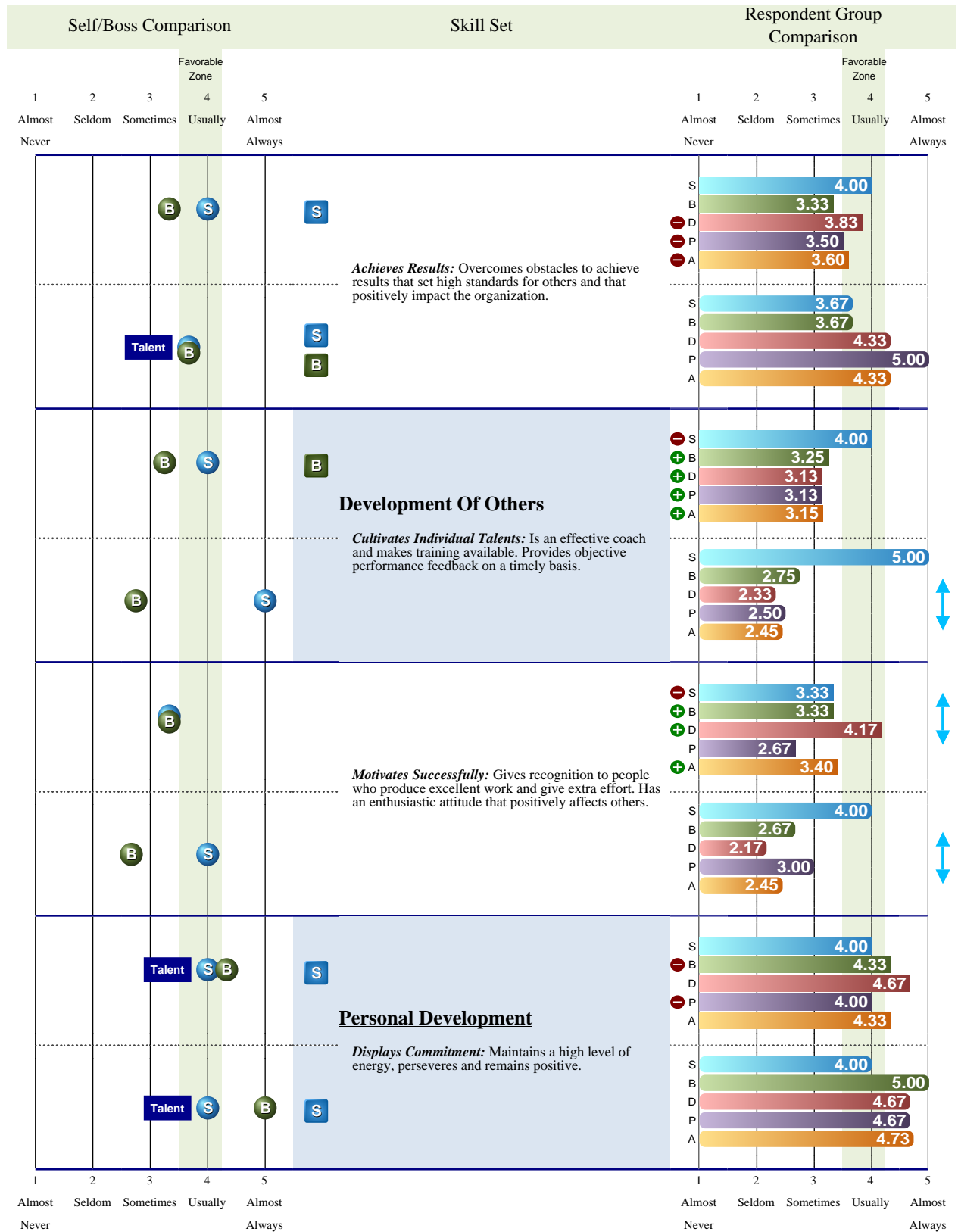
**-** Indicates a .5 or greater decrease in average rating since the previous rating period.



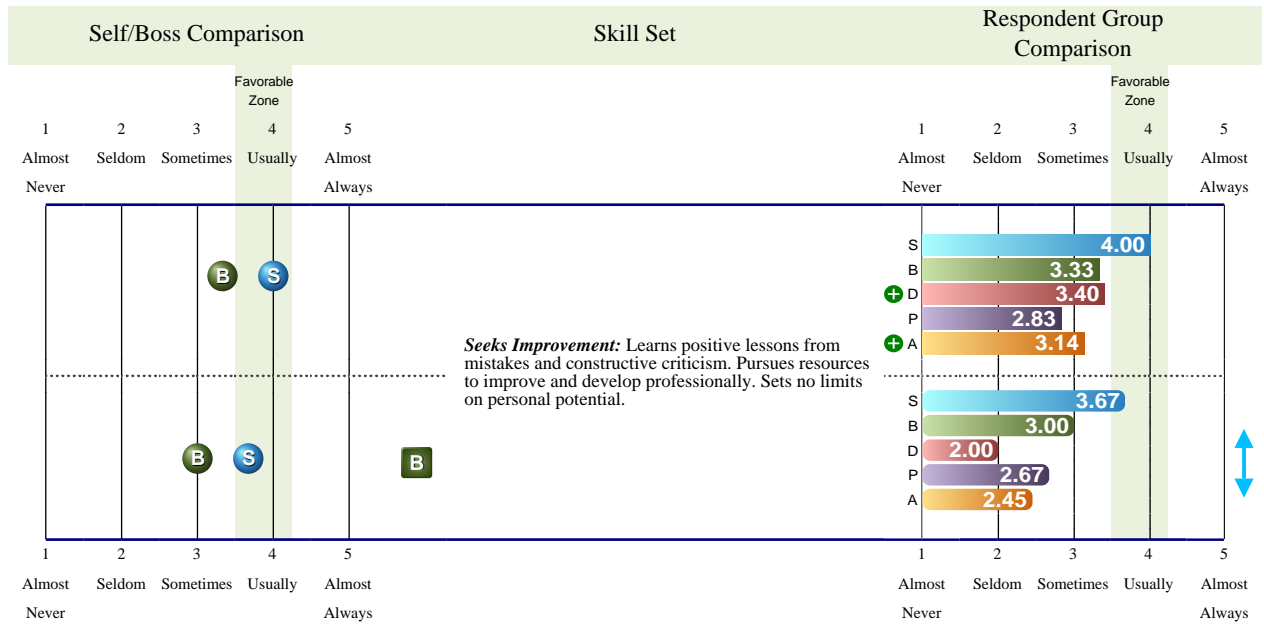






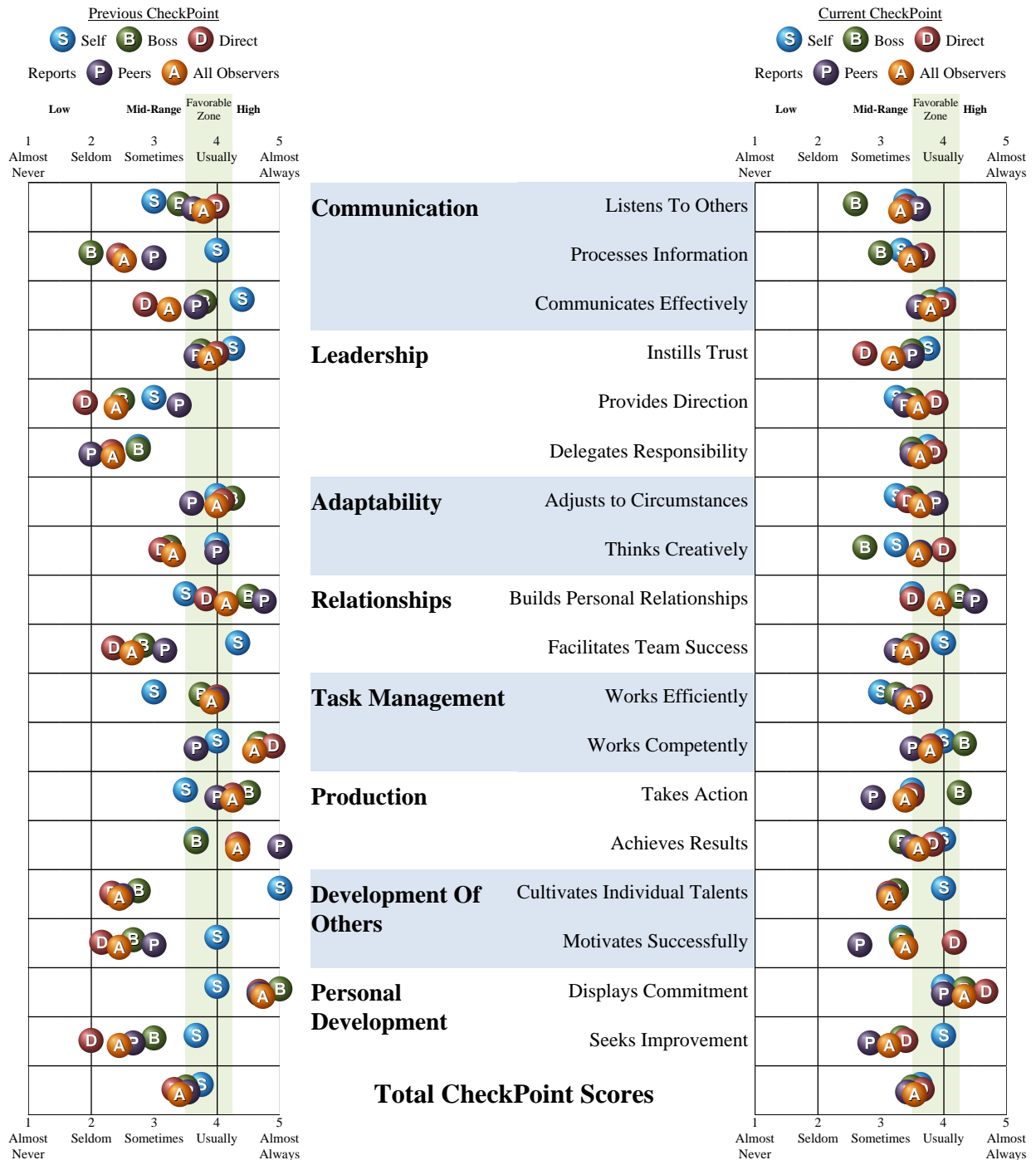







## Respondent Group Comparison

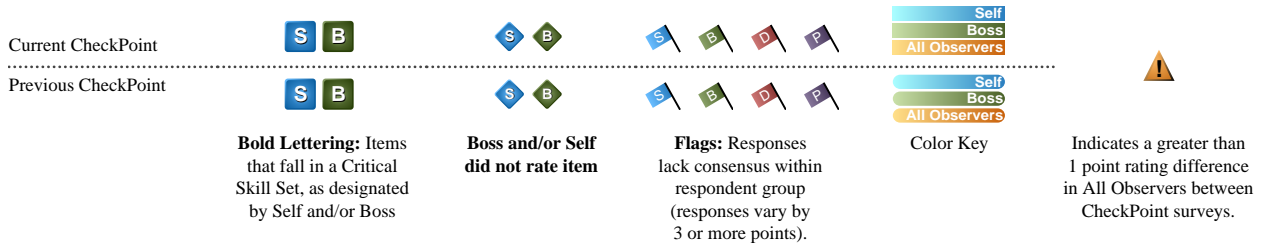
This page presents the relative placement of the average Skill Set scores for each of the Respondent Groups. Each Skill Set is shown with its appropriate Management competency.



## Survey Summary of the 70 items

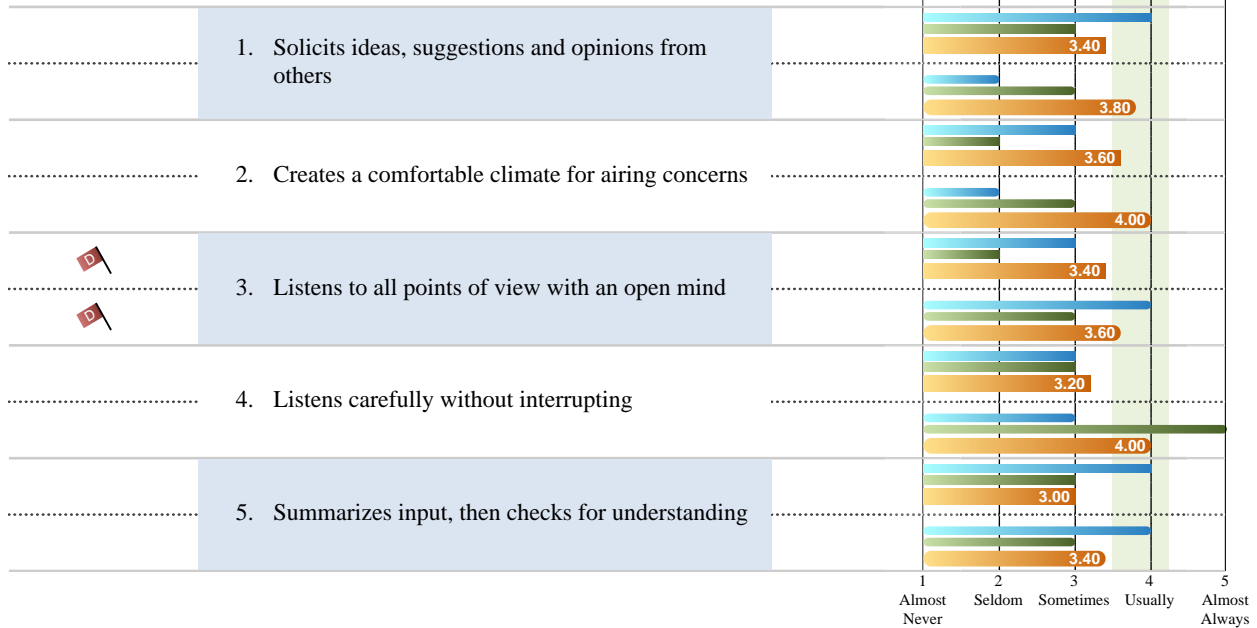
The ratings for each individual question are shown for easy analysis. Notice that the ratings for each CheckPoint survey are grouped together and separated by the dotted line. For each CheckPoint survey, should there be a variance of 3 or more points between groups on a given question a flag will appear with that group's identifying letter on it. You should pay close attention to these questions because this wide variance will have had an impact on the average.

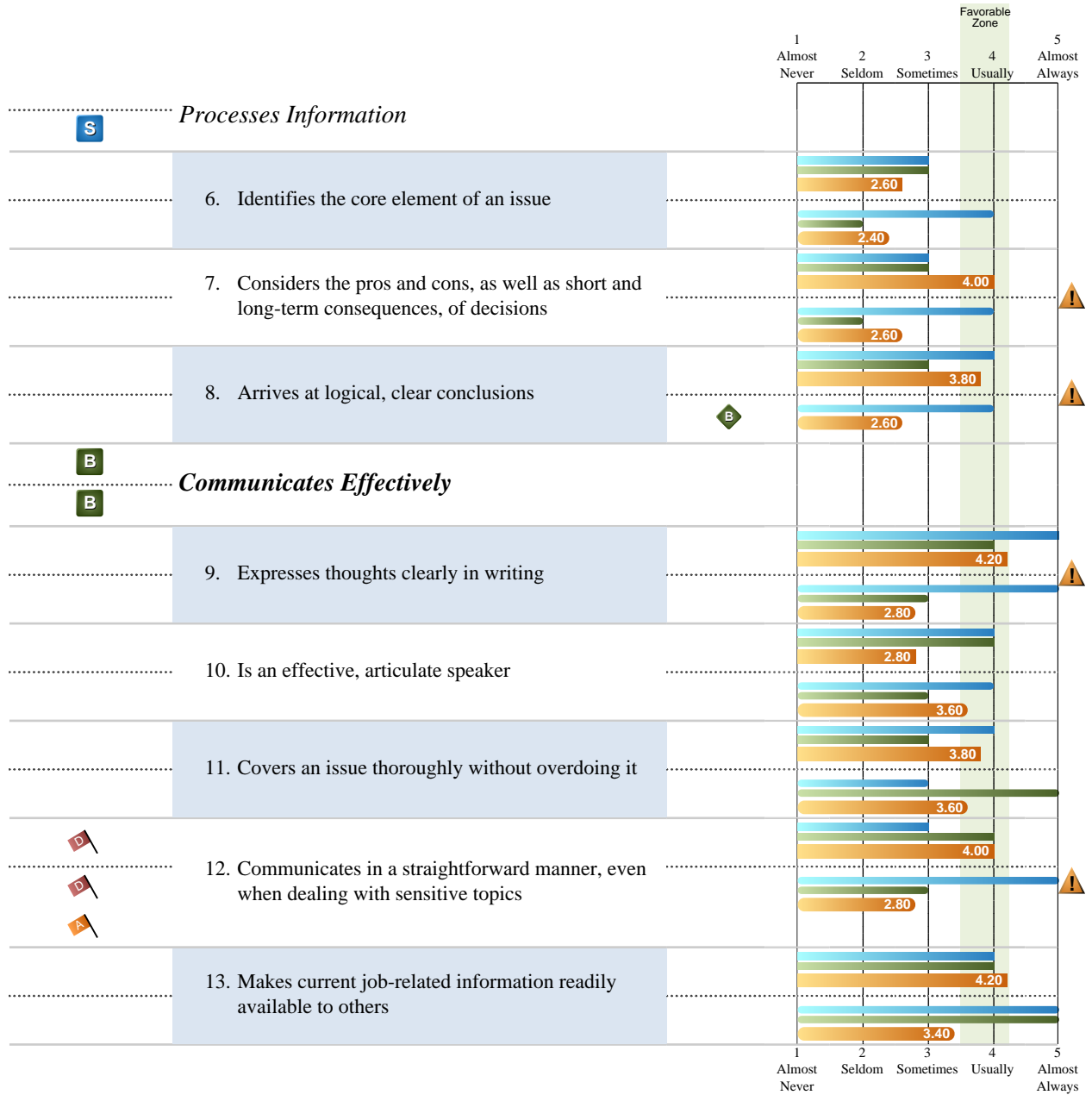
Where the **All Observers** averages vary more than 1 point between CheckPoint surveys, this icon will appear . This situation could indicate a change in the expectations of the observers between the surveys.



### Communication

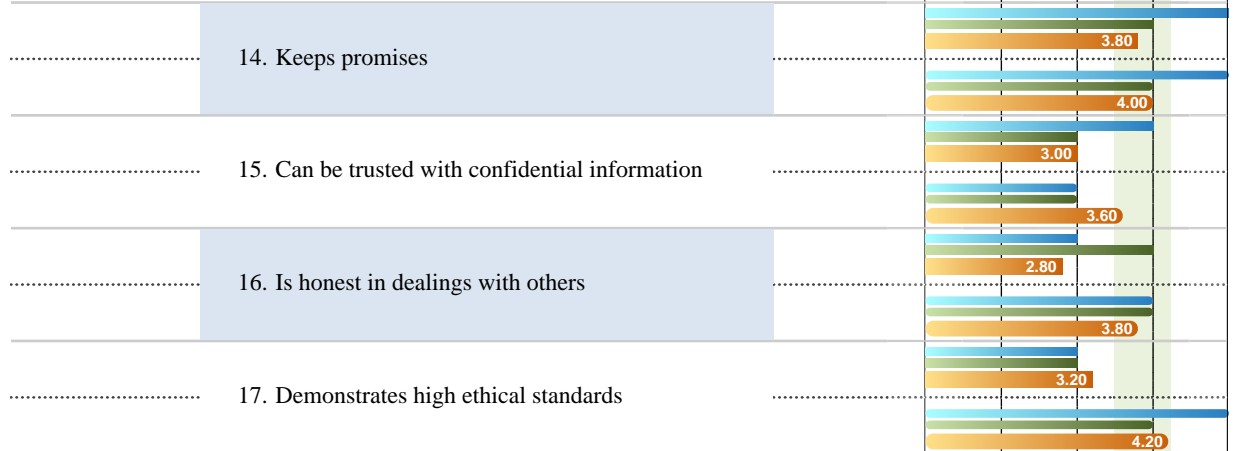
#### ..... *Listens To Others*



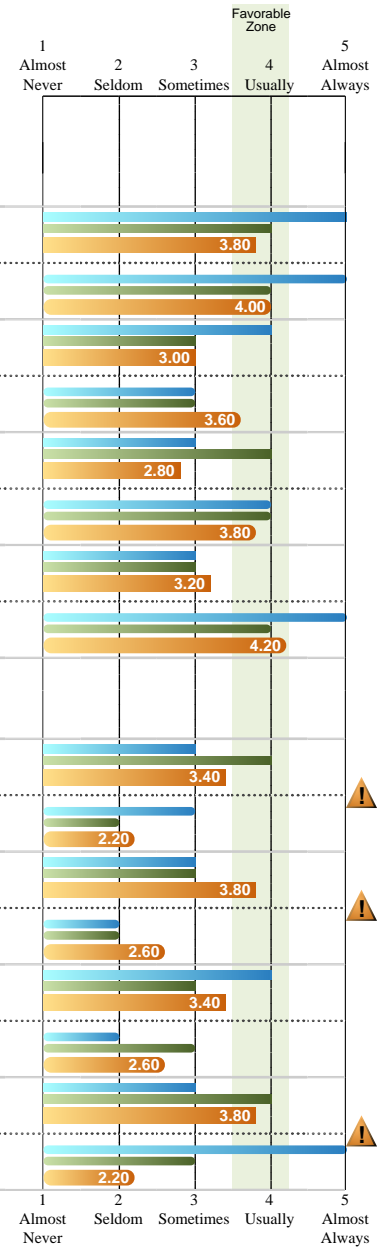
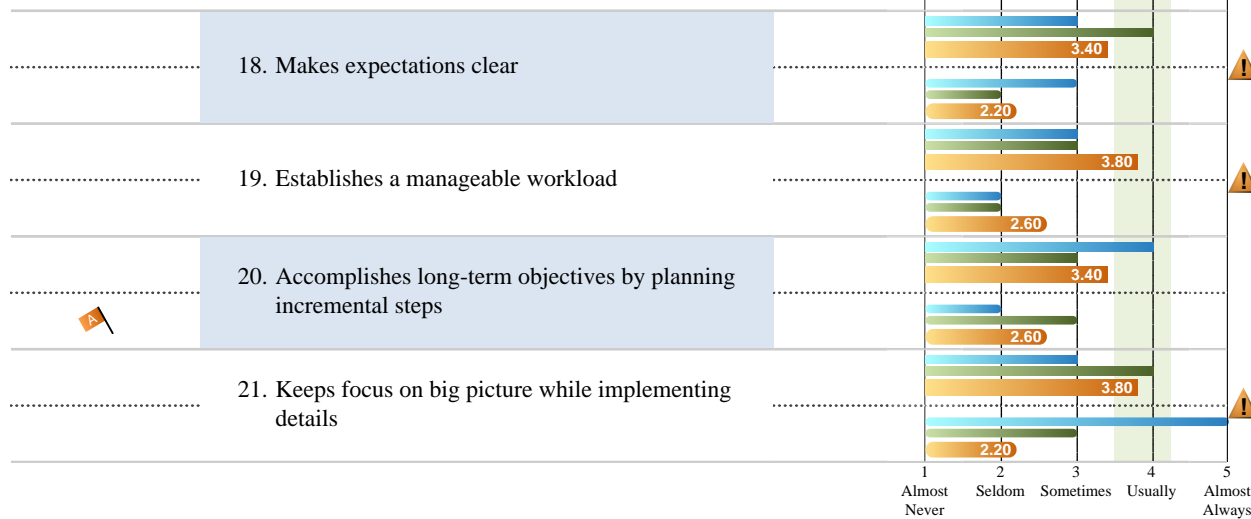


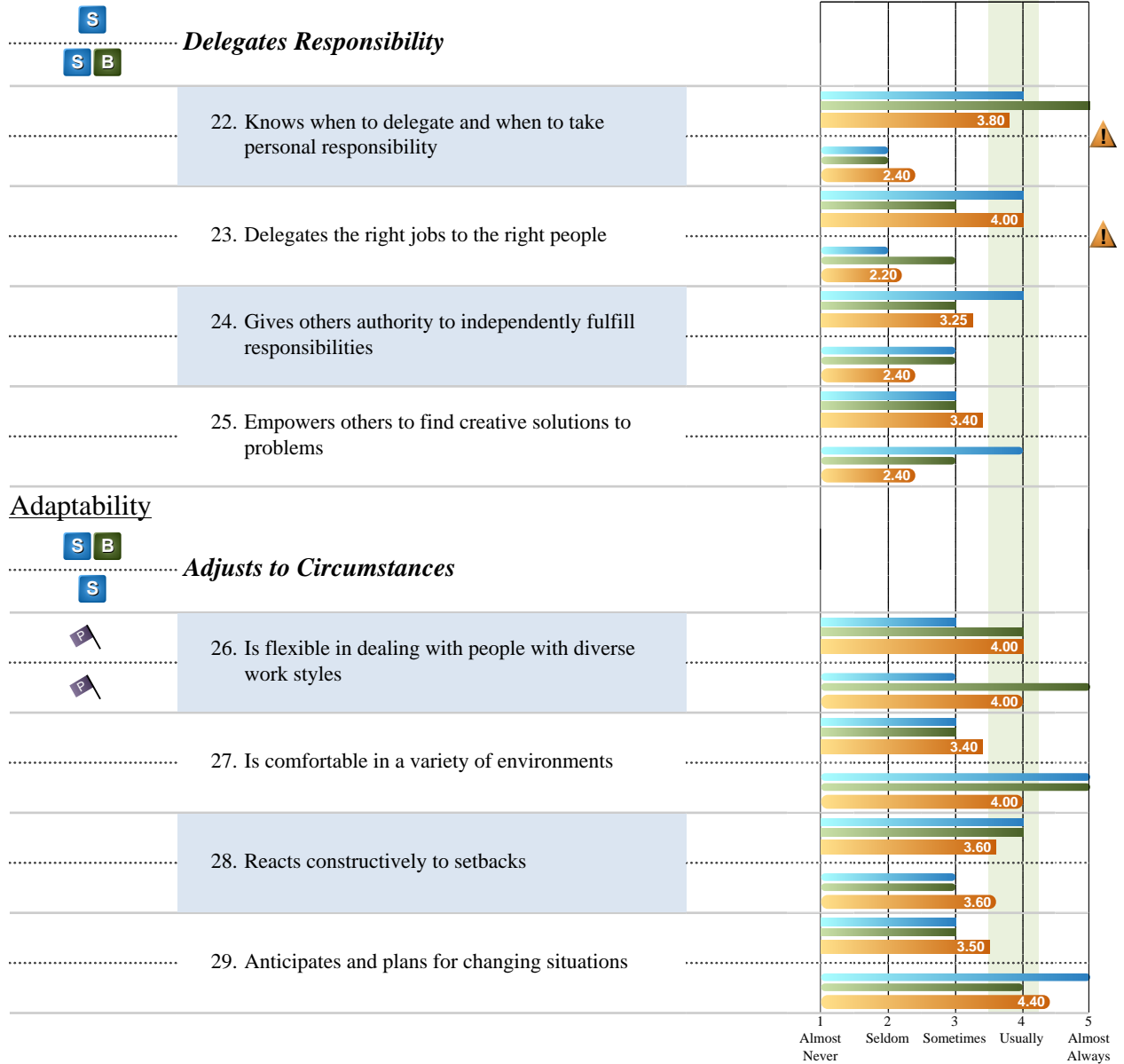
Leadership

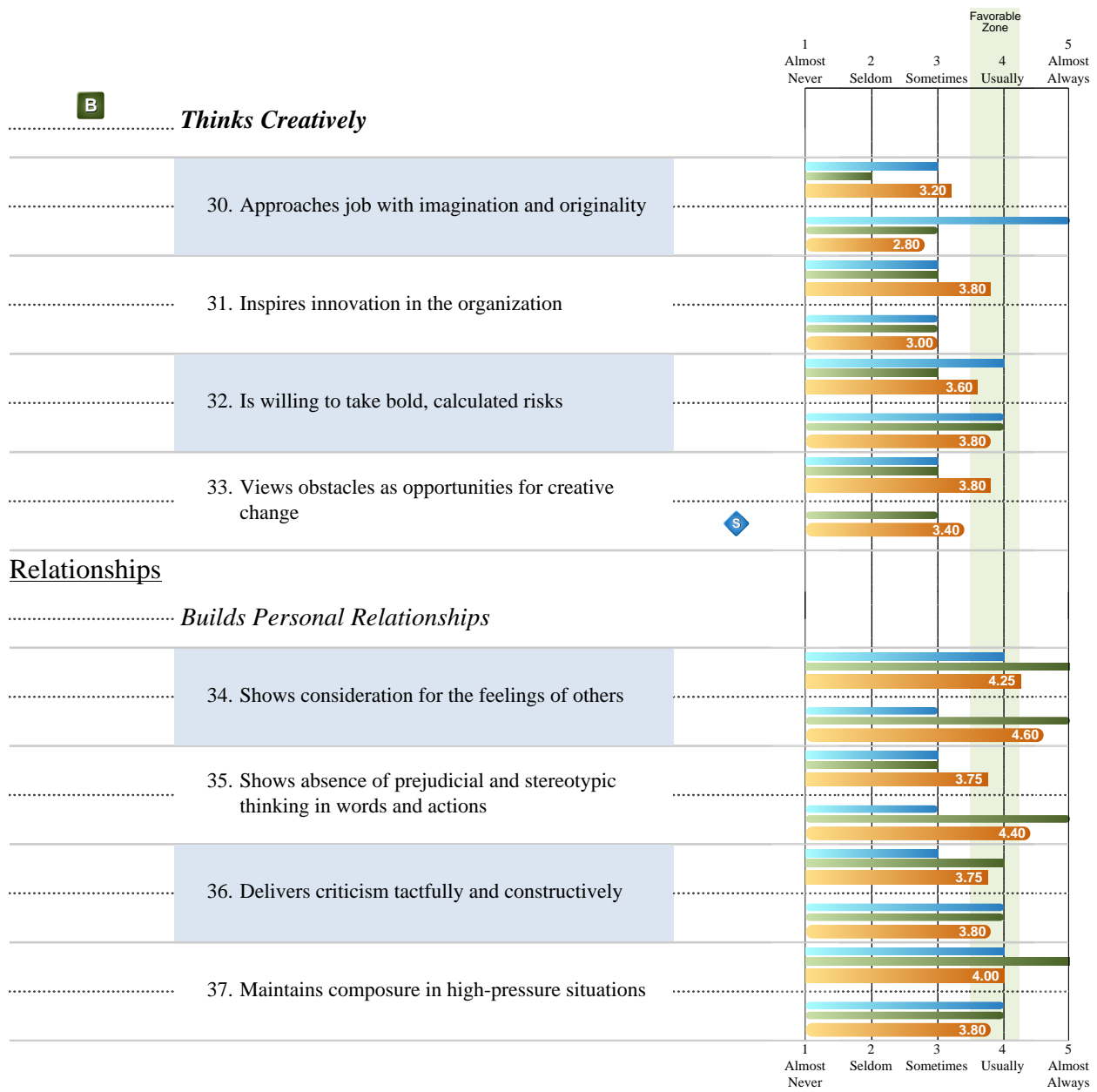
..... *Instills Trust*

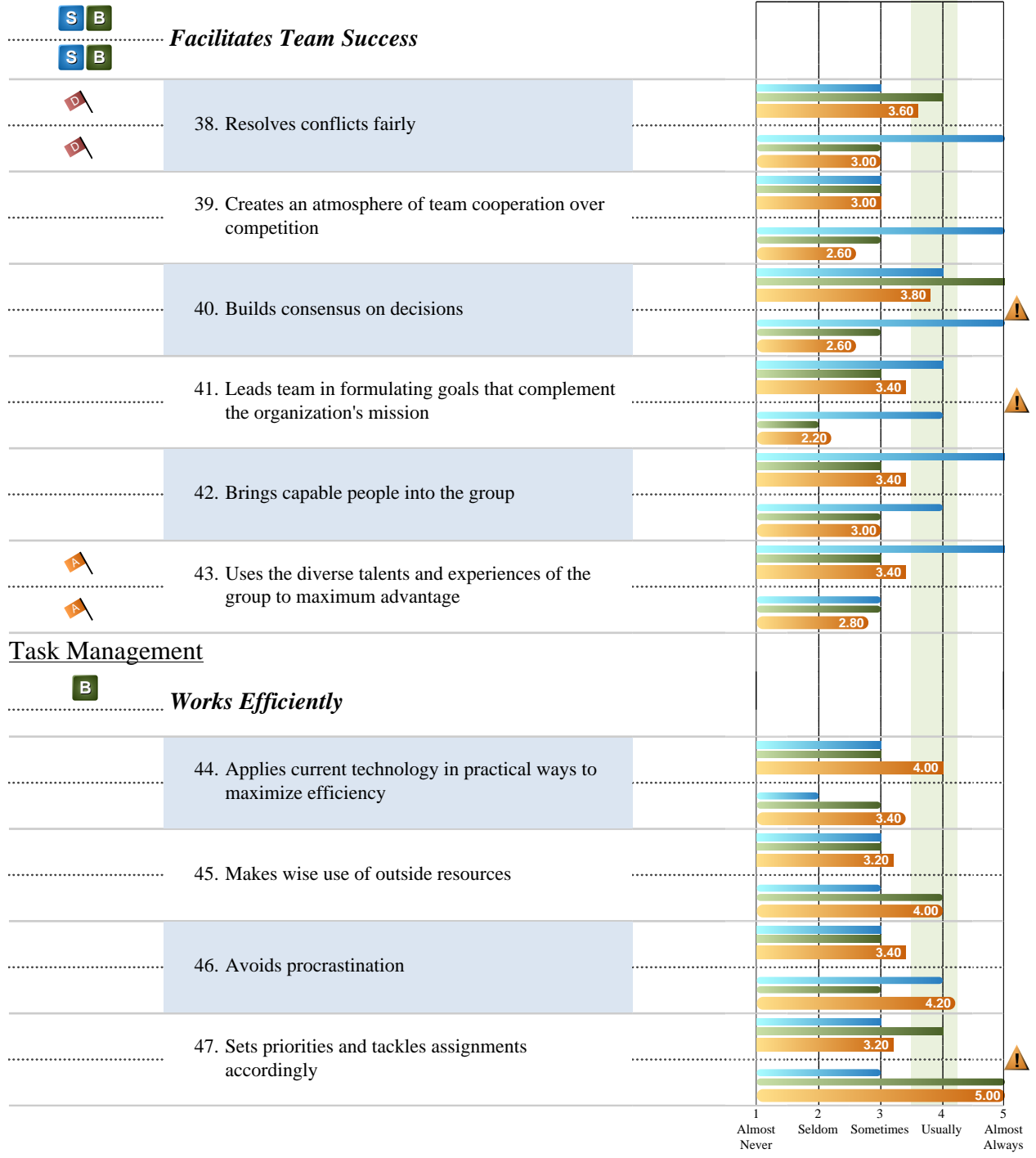


**B** ..... *Provides Direction*

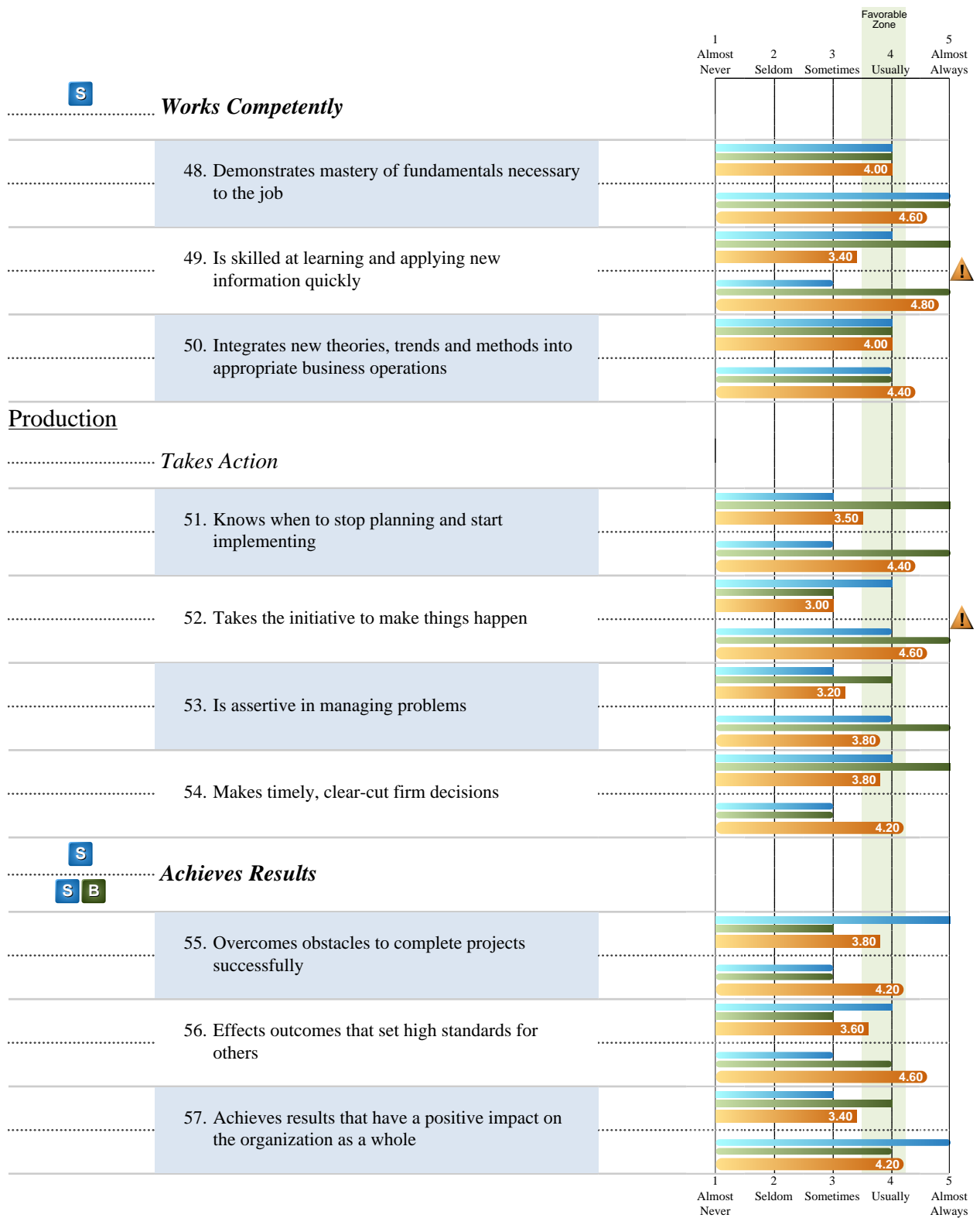








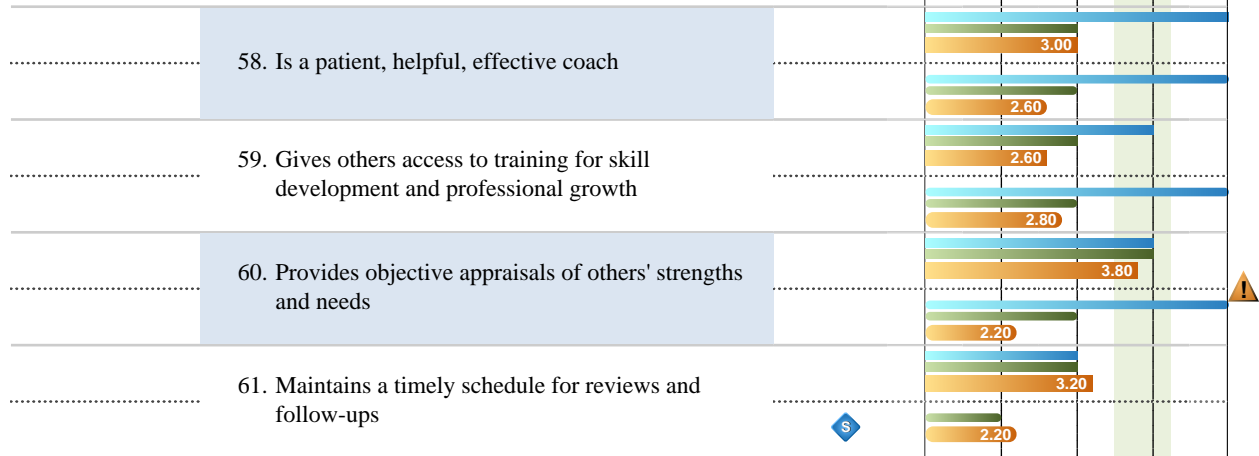




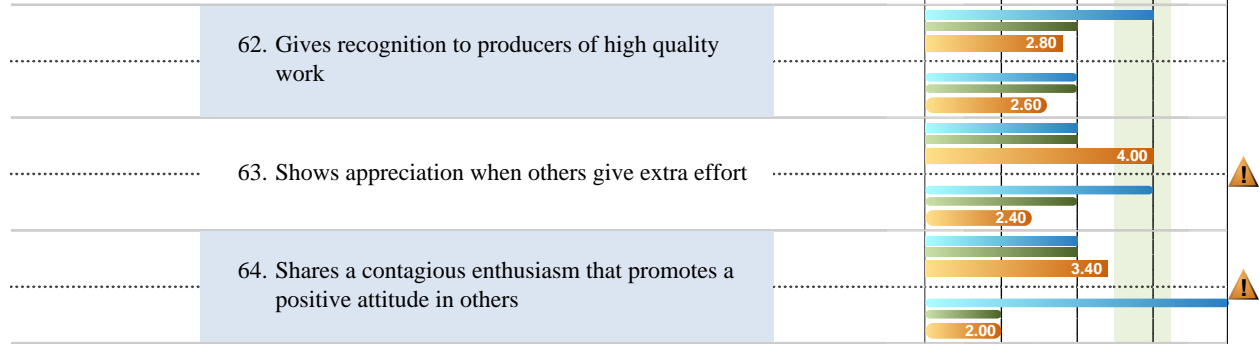
Development Of Others

**B**

*Cultivates Individual Talents*



*Motivates Successfully*

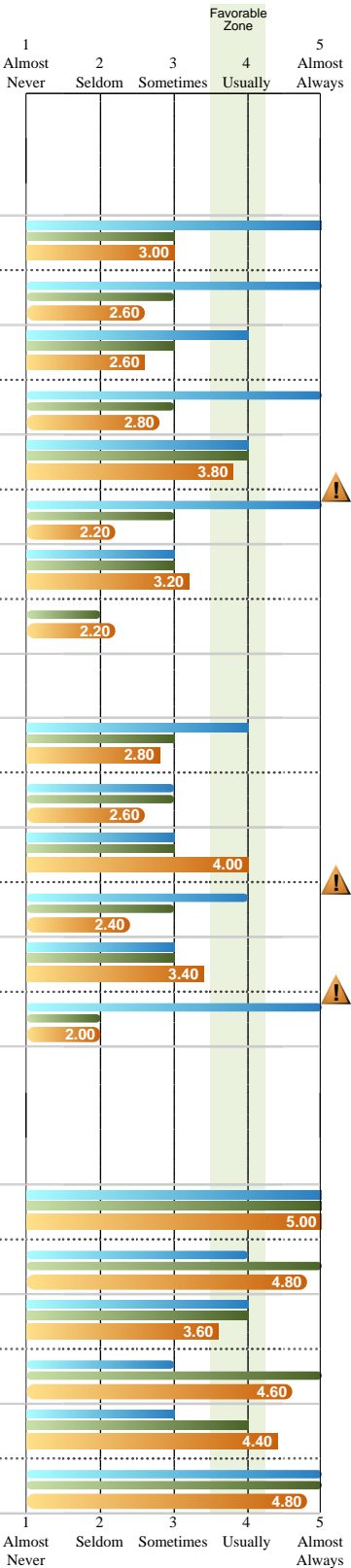
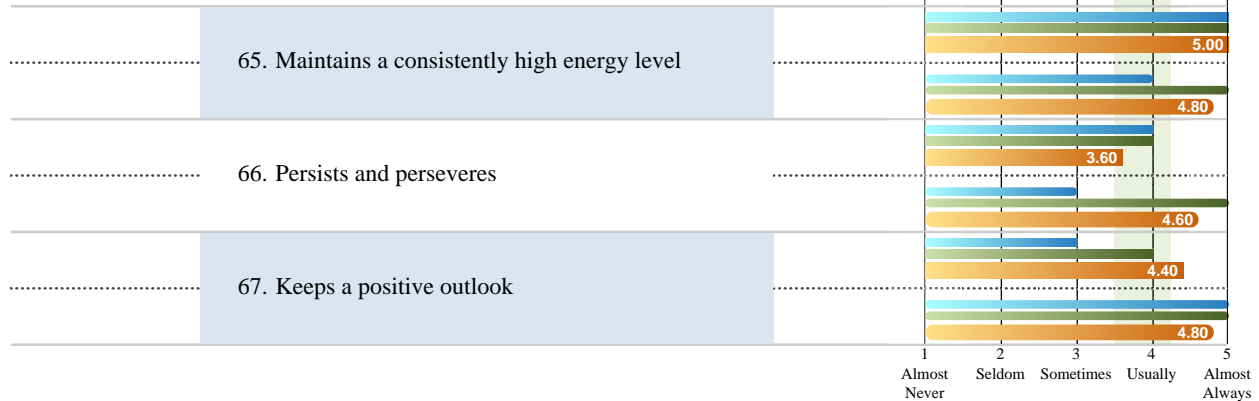


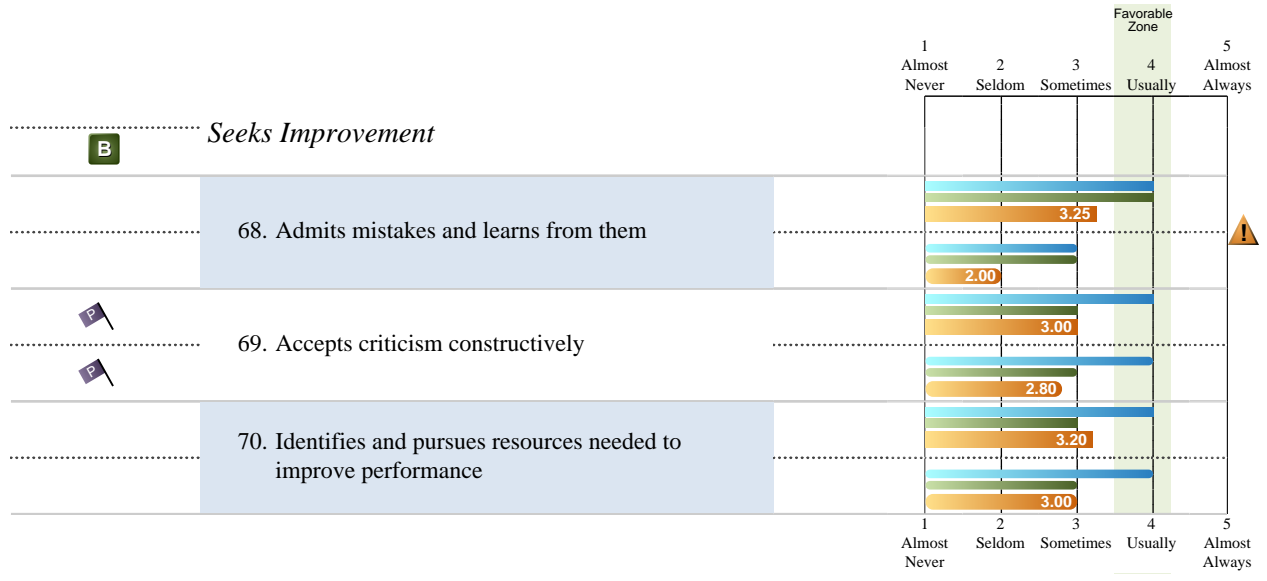
Personal Development

**S**

*Displays Commitment*

**S**

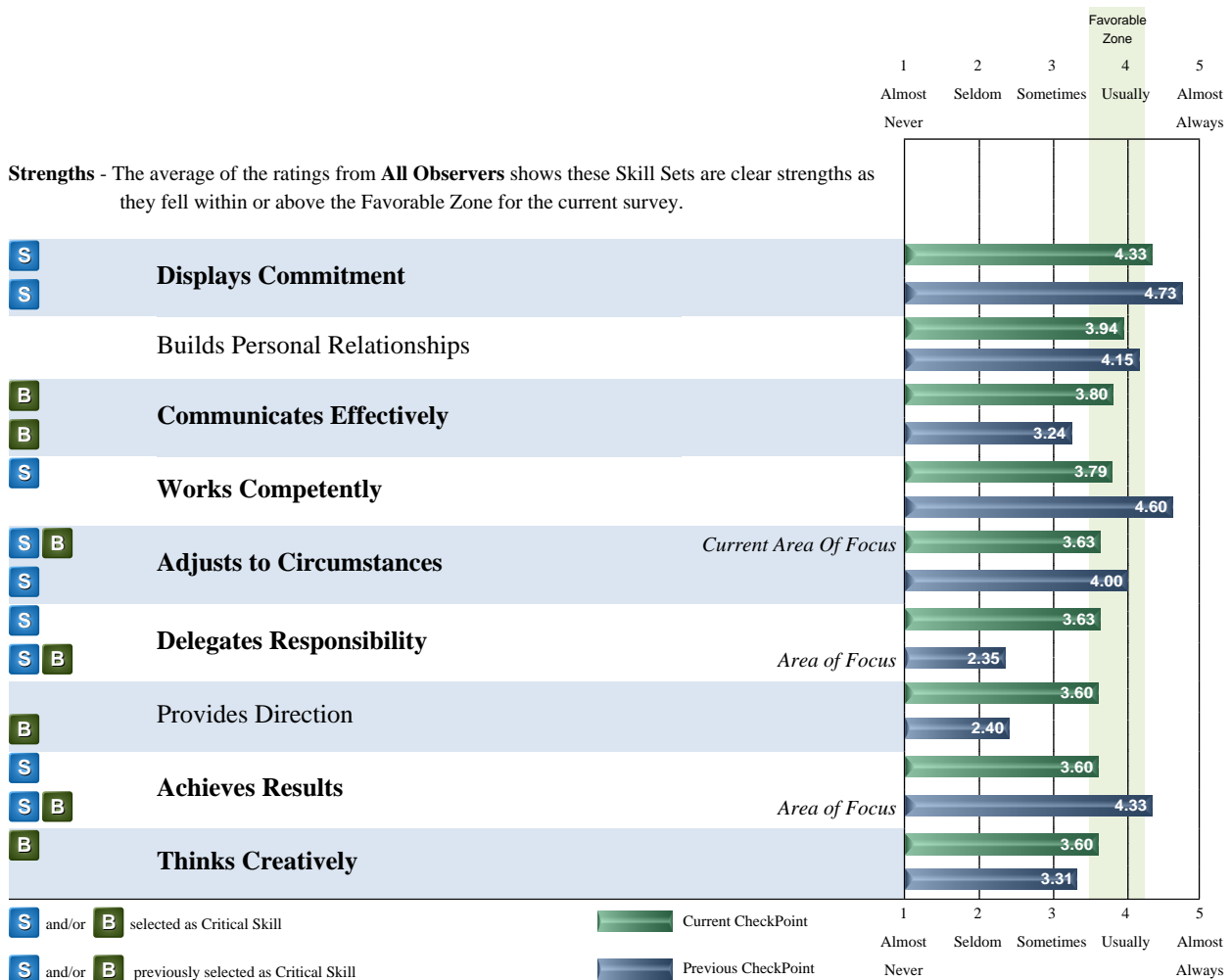




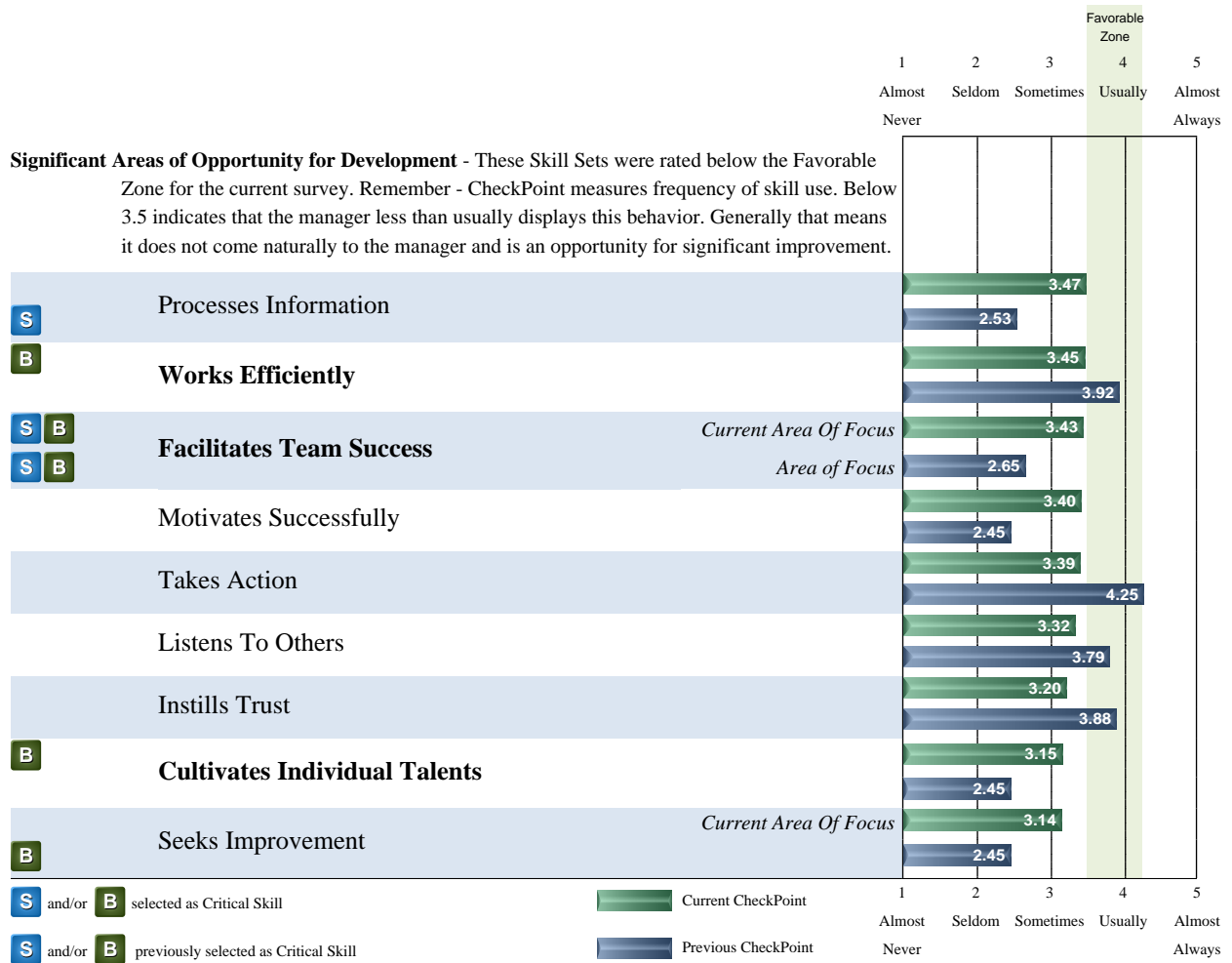
## Development Summary Overview

It is good to know how the observers rated the behaviors the manager exhibits on all Skill Sets. For both CheckPoint surveys, here you will see all 18 Skill Sets with the average of ratings. Note also the skill sets you and/or Sally Sample identified as critical to success and any changes to those designations between surveys. When any of these Critical Skill Sets are identified as an Area of Focus, they deserve special attention.

"Areas of Focus" are those behaviors that represent opportunities for enhancing effectiveness. Some Areas of Focus may be listed as strengths because often honing strengths is an excellent way to begin improving skills. Others could fall below the Favorable Zone and thus present possible limitations observed in the behavior of the manager.



**Significant Areas of Opportunity for Development** - These Skill Sets were rated below the Favorable Zone for the current survey. Remember - CheckPoint measures frequency of skill use. Below 3.5 indicates that the manager less than usually displays this behavior. Generally that means it does not come naturally to the manager and is an opportunity for significant improvement.



# Coaching & Management Considerations

December 23, 2010

Regarding Sally Sample

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## Working With Sally Sample

To effectively manage the information provided to Sally Sample in this report we recommend creating a plan to initiate understanding and accountability for expected outcomes. The Individual Development Plan is a tool that is effective in accomplishing this goal.

Leaders follow through on development plans when the leadership need is directly linked to a business challenge or strategy. Think of the Individual Development Plan as any other project or business plan. Design the plan to be realistic, to consist of actions your manager can take every day on the job, and to tie directly to organizational priorities.

## Individual Development Plan - Accountability Process

The manager has been tasked with creating an Individual Development Plan (IDP). Your role is to coach Sally Sample on situations related to the IDP, provide feedback, and reinforce acceptable behaviors. Providing this input will help fulfill the intent of the IDP.

First, help the manager identify what they should begin to do differently to improve a skill or behavior, then, have them start doing it. Most often the best course of action for personal and professional growth is obvious and easy to recognize. Next, connect the development of the particular skills to business improvement and agree that the development in these areas is important. Only when they have recognized changes are needed, can they effectively develop an Individual Development Plan. Finally, create the development plan. The IDP need not be complex. The most significant development opportunities take place on the job, so the development process is facilitated as part of current job responsibilities.

To begin this process of growth, we recommend the K-S-S Method which is explained in detail in the **Areas of Focus** section which follows.

## Coaching & Management Considerations

These are suggestions which may help you use the information in this report to effectively help the manager grow and develop in the job. Consider these suggestions as you refer to the previous pages.

### 1. Executive Competency Overview Graph

- Look for Gaps (a difference of 1.0 or more) flagged on the report. Make sure you are aware when and where gaps exist.
- Look at the ratings relative to the Favorable Zone. Pay particular attention to those ratings farthest away from the Favorable Zone.

## 2. **Executive Skill Set Summary**

- Note those Skill Sets that are rated below the Favorable Zone. These may need particular attention from the manager.
- Encourage Sally Sample to also further develop those skill sets that are in or above the Favorable Zone.

## 3. **Critical Skills Alignment Summary**

- Pay particular attention to those skill sets upon which you and the manager disagreed. These are the skill sets chosen only by you or only by the manager. This suggests a potential difference in expectations between you and Sally Sample.
- Make sure the manager understands your expectations about which critical skill sets should receive the most focus.

## 4. **Executive Summary**

- Look again for gaps that exist, especially in the critical skill sets. Any gaps would suggest a discrepancy in the perceptions between those groups of raters.
- Pay particular attention to areas where either your or the manager's rating fell below the Favorable Zone. When the manager's perception differs significantly from other groups Sally Sample needs to look for the reason.

## 5. **Skill Set Analysis**

- Check the ratings where both your and the manager's ratings are in the Favorable Zone. This provides an excellent opportunity for recognition. Take particular notice of skill sets marked as "Talent" or "Focus." Talent Skill Sets represent skills to used and improved. The Skill Sets identified as "Focus" require more immediate attention to enhance performance. In both cases these Skill Sets are critical to the success of Sally Sample.
- Look for those scores farthest below the Favorable Zone as these indicate a definite need for additional training.
- Once again, gaps between the average ratings in one or more groups needs to be understood.
- Look for areas where you rated the manager higher than they rated themselves. These areas of misalignment offer an excellent opportunity to improve communication and understanding between you and Sally Sample.

## 6. **Respondent Group Comparison**

- This presentation of the average scores provides a board view of the differences between respondent groups.



**7. Survey Summary of the 70 Items**

- Use this section to refer to the actual questions from which the skill set scores were calculated.
- Take notice of a flag in front of any behavior. This identifies a gap of at least 3 points between respondents within a group.
- Review this section before meeting with Sally Sample as it will best prepare you to discuss any areas of disagreement.
- Ensure you and Sally Sample have agreed on clear action steps have been identified with appropriate timelines.

**8. Development Summary Overview**

- The Skill Set with the lowest average score requires immediate attention. In addition, two other Skill Sets have been identified as Areas of Focus because it was determined that they were critical to success in this job.

Schedule a follow-up meeting with Sally Sample to discuss progress in personal development, and also schedule the next administration of the Checkpoint 360°.

For your reference,  
the remainder of this report was provided to the manager  
in the Individual Feedback Report.

This can serve as a foundation for establishing a  
Individual Development Plan for Sally Sample.

## Areas of Focus

You cannot risk leaving your personal development to chance; planning is essential. How many times have you stated to yourself or others your intentions to act but fall back into old habits? Leaders follow through on development plans when the leadership need is directly linked to a business challenge or pain point. Think of your Individual Development Plan (IDP) as you would any other project or business plan, and design it to be realistic, to consist of actions you can take every day on the job, and to tie directly to organizational priorities.

### Developing Your Individual Development Plan

People tend to play to their strengths. So, too, do leaders - choosing to utilize one skill over another due to their personal proficiencies. They have the knowledge and experience to use certain skills in almost any situation. If, as a leader, you don't favor or simply lack proficiency with a skill that is deemed important to your organization, there are two steps you can take immediately to get started in your development. First, if you know what to do differently to improve a skill or behavior, do it! Second, create an Individual Development Plan. Your Development Plan need not be complex. Most often, your best course of action for personal and professional growth and development is obvious and easy to recognize. The most significant development opportunities take place on the job and are totally under your control. To begin this process of growth, you need to use the **K-S-S** Method:

**K** = actions you should **KEEP** doing, which are things you already do well. **KEEP** doing them!

**S** = actions you should **STOP** doing. As you analyzed your Feedback Report, you recognized behaviors that bring negative results - this is an indication of something you should **STOP** doing.

**S** = actions you should **START** doing. You have learned things you could be doing to enhance your effectiveness. **START** doing them at the earliest opportunity. As you add to your knowledge base and acquire ideas for better leadership performance, form the habit of doing them. Make **START** doing a regular part of your development process.

You can get started on your Individual Development Plan with this simple process:

1. Consider your ratings on the survey behaviors in your Areas of Focus and identify the leadership skills and supporting behaviors that you are going to work on.
2. Review the lists of Job Tips and Challenging Activities for the supporting behaviors in your Areas of Focus, which are included on the following pages.
3. Then, using the **K-S-S** Model, identify those actions appropriate to **Keep** doing, actions to **Stop** doing, or actions to **Start** doing.

## Area of Focus: Adjusting to Circumstances

### Being Flexible in Dealing with People with Diverse Work Styles

#### Skills, Behaviors, and Attitudes to Adapt and Practice

- Understand that your approach to work is correct, but that does not make it the only correct approach. Realize that contrasting work styles can complement one another and make for a stronger overall outcome.
- Take into account the input you receive from all levels in the organization.
- Involve diverse groups in solving problems and developing opportunities.
- State that your intention is to understand another person's viewpoint, not to have him/her justify it when asking for an explanation of a viewpoint that differs from yours.
- Be sensitive to the fact that some people want their differences recognized, while others do not.
- Examine the reasons why people approach the task, topic or objective as they do. Use this information to decide which way or what combination of ways will create the result you want.
- Continually examine your automatic thoughts and language for unexamined assumptions and stereotypical responses.

#### Challenging Activities

- Make a list of your direct reports. List as many differences as you can between their work styles. With your Performance Coach, consider how you can gain the full potential of each, using his/her preferred work style. Consider the following styles:
- Some approach projects in a structured, time-efficient manner; others may have a less structured and more creative approach.
- Some focus on details; others may focus on the "big picture."
- Some prefer an approach that involves bouncing ideas and strategies off others; others may prefer to work in solitude.
- Some prefer individual projects; others may prefer involving a group or team.

### Being Comfortable in a Variety of Environments

#### Skills, Behaviors, and Attitudes to Adapt and Practice

- Pursue experiences outside the norm for you. Learn to adapt to, and become confident in, a variety of work environments with differing expectations.
- Become comfortable with the different environments within your own work unit, other teams in the organization, your customers, suppliers and your own manager - expand your environment.
- Read a book on business etiquette and freshen your social skills.
- Become comfortable in the environment of your peers, manager and upper management. Develop effective working relationships and come across as a team member, not a competitor.

- When you use accepted etiquette, you are using behaviors that encourage human response; you are more likely to get positive results, earn cooperation and support, get commitments, gain customers and keep peace.

### Challenging Activities

- For the following list of environments, rate your comfort level in each environment: Global and foreign; your work unit; peers and their work units; your manager; upper management; customers; business meetings; company dinners/luncheons;. Select three environments where you are least comfortable and write a goal statement on how you can become more comfortable in these situations. Include the skills that need to be sharpened and the resources you will use to increase your confidence and poise in your next interaction in this environment.

## Reacting Constructively to Setbacks

### Skills, Behaviors, and Attitudes to Adapt and Practice

- Remember that setbacks are inevitable and are rarely catastrophic. Keep things in perspective. Avoid agonizing over minor adjustments to the big plan.
- Develop your assertiveness skills. When setbacks occur, learn to say what you think and feel in ways others can hear and understand.
- Express your frustrations about setbacks without blaming others. Rather than looking at what others did or did not do, focus on your role in the setback.
- Be aware of times when you are holding on to a solution or procedure because "That's the way it has always been done," rather than considering other viable alternatives. Rather than assuming the first alternative that enters your mind is the best solution, consider other options.
- The next time you experience a setback, ask yourself, "What did I learn?" Determine where things went wrong and what you could do differently next time to prevent a similar setback.

### Challenging Activities

- In setback situations, keep a cool head and evaluate the seriousness of the setback before reacting: Make it a practice to discuss the setback situation (especially if it impacts a deadline) with your manager, a peer or effected direct reports before making a decision. Together, gather all the facts and evaluate the seriousness of the setback. Give the situation a crisis rating from 1 (can wait) to 10 (needs immediate attention). Together, brainstorm alternative courses of action. Select the alternative that best addresses the setback situation.

## Anticipating and Planning for Changing Situations

### Skills, Behaviors, and Attitudes to Adapt and Practice

- Listen to and ask for a lot of advice in change situations. Identify the change champions in your organization and work with them to support and initiate change.
- Don't assume that "business as usual" will keep the loyalty of your customers. Anticipate their changing needs.
- Read current business books and periodicals, as well as general interest materials. Learn to spot trends and apply them to your business.

- Be proactive. Choose change instead of waiting to react to change.
- Prepare your direct reports to expect change; continuous improvement involves "change." Your direct reports will support change when they:
  - Expect that the change will result in some personal gain
  - Expect a new challenge as a result
  - Believe the change makes sense and is the right thing to do at the right time
  - Are given an opportunity to provide input into the change
  - Respect the person who is championing the change

### **Challenging Activities**

- Ask your Human Resources professional mentor to refer books and materials on Planning for Change. From this material, develop a checklist for Planning for Change that you can follow in changing situations. Make sure the materials you choose address:
  - Steps for Change Management
  - Planning Change
  - Gaining Commitment
  - Setting up Needed Systems and Structures for Change
  - Involving Others in the Change Process
  - Communicating the Change
  - Following Up on the Change

## Area of Focus: Facilitating Team Success

### Resolving Conflict Fairly

#### Skills, Behaviors and Attitudes to Adapt and Practice

- Conflict situations should be approached as opportunities to strengthen interpersonal relationships.
- Listen carefully to all viewpoints in a disagreement. Define the problem. Restate positions held by those on both sides of a conflict to ensure that the conflict is not just a misunderstanding and to show that you understand the others' perspective. Then, begin the resolution process.
- If a conflict escalates, call for a time out. Reconvene when both parties have calmed to a productive level and have regained their perspective.

#### Challenging Activities

- When a conflict requires your intervention: 1) Help define the problem in specific, observable terms. 2) Ensure that each person listens to the other. 3) Help them identify areas of agreement. 4) Have them brainstorm alternative approaches and possible solutions. 5) Create a problem-resolution plan. 6) Arrange for progress meetings.

### Creating an Atmosphere of Team Cooperation over Competition

#### Skills, Behaviors and Attitudes to Adapt and Practice

- When recognizing outstanding performance, go beyond the acknowledgment of individual success. Give equal emphasis to team achievements and effective cooperation among teams. Validate the importance of every team member's contribution.
- Encourage cooperation, rather than competition. Make sure direct reports set their goals in harmony with one another and that the goals are mutually supportive.
- Help team members understand one another better by sharing information on the work they are doing. Discuss work histories, specific skills, successes, and talents. Help team members understand, appreciate, and use differences among themselves to perform better work.
- Give feedback to those direct reports that you see devaluing other members of the team.

### Building Consensus on Decisions

#### Skills, Behaviors and Attitudes to Adapt and Practice

- Strive for consensus in order to increase commitment to the final decision. Gain support for decisions by involving the team in considering alternate approaches.
- When selecting people to attend decision-making meetings, make sure all pertinent groups are represented - ask, "Do we need anyone else in this meeting before we proceed?"
- Everyone in the group who is helping to come to a consensus on a decision should have the same level of information and should put all assumptions on the table.
- Practice the art of compromise when making decisions, creating win/win situations.

## Challenging Activities

- Keep this checklist before you when leading a consensus decision-making meeting. You cannot say you have reached consensus until you can check each statement.
  - The agreement (decision, solution or plan) meets or exceeds your needs
  - The agreement meets or exceeds the other team members' individual needs
  - The agreement addresses the reason for getting together in the first place
  - Everyone on the consensus decision-making team will support the agreement

## Leading Team in Formulating Goals that Complement the Organization's Mission

### Skills, Behaviors and Attitudes to Adapt and Practice

- As much as possible, involve the team in formulating goals consistent with, and supportive of, the overall mission of your organization. Active participation by your direct reports in goal setting produces an ownership element that reflects a commitment to achieve the goals they write.
- Assure that written goals contain action verbs and measurable outcomes, as well as specific dates, times, cost, and resource constraints.
- Make sure everyone understands the teams' goals, as well as their role in attaining the goals.
- To ensure goal achievement, you must implement the goal, monitor progress at specific intervals and, as necessary, revise the goal objectives. Keep everyone informed of team progress.

### Challenging Activities

- Ask your Human Resources professional to assist you in training your work unit on basic goal setting. If you are an effective trainer, facilitate an in-house training event or request an outside source. Before training, learn as much as you can about your organization's goals and mission.

## Bringing Capable People into the Group

### Skills, Behaviors and Attitudes to Adapt and Practice

- Review your strategic plan and your work unit's future challenges. Analyze the mix of people on your team and identify missing skills. Recruit individuals with skills that complement your team.
- Know the job for which you are hiring. Do a complete job analysis to gain a clear picture of the experience and skills required for each position.
- Identify direct reports who are successful in your organization and hire new people with similar characteristics and work ethics.
- Do not hire people in your own image - it results in a team with limited skill sets and points of view. Don't be afraid to hire someone more intelligent or even more talented than you.

## Challenging Activities

- Analyze your team to see how well you have filled positions in the past. Identify people who seemed to be poor matches (resignations, terminations, poor performance, absenteeism, excessive conflict, etc.). Review the situations that signal a poor match and look for the reason (missing skills, personal style, lack of motivation, etc.). Look for a pattern. Determine reasons for the poor matches (selection/placement procedures, poor interviewing skills, using gut-feelings, etc.)?

## Using the Diverse Talents and Experiences of the Group to Maximum Advantage

### Skills, Behaviors and Attitudes to Adapt and Practice

- Capitalize on each person's strengths and experiences to create a potent team effort.
- Be willing to take the ideas of your people to the next organizational level and support their ideas enthusiastically. Give credit where credit is due.
- Assign direct reports possessing the required skills to perform new tasks for greater efficiency.
- Be aware that a fall in personal productivity may indicate that a direct report is not being challenged. Keep a constant check that you are providing every person in your work unit the opportunity to apply all of their skills and talents to their job.

## Challenging Activities

- You first learned of your direct reports' talents and experiences through your hiring process. Refresh your memory by reviewing their resumes and applications to be sure you are using their diverse talents and experiences to maximize performance in your work unit.



## Area of Focus: Seeking Improvement

### Admitting Mistakes and Learning from Them

#### Skills, Behaviors, and Attitudes to Adapt and Practice

- If you do not learn from a mistake, then it becomes a failure.
- Do not blame others. Take responsibility for your mistakes. Freely admit your mistakes and encourage others to do the same. Discuss with others what you did right and what you could have done differently.
- Admitting your mistakes increases your credibility by letting others know that if they make mistakes, there is no severe punishment. They will believe that you understand that they are human, also.
- Remember, every mistake happens because of a decision. You make the decision to say something, implement something, change something, etc. Assumptions about important decisions are some of the most frequent mistakes made. Gather data and input before making major decisions.
- If you find that a decision was not the best, withdraw it at once. Let all concerned know about the change and make the decision all over again in light of what you learned. Go through all the necessary steps for a good decision.
- Give clear, complete instructions. Most mistakes happen because of poor communication. If a mistake is made because of your poor communication, take the blame and correct the problem.

#### Challenging Activities

- Every mistake happens because of a conscious decision. Make a list of decisions you have made in the past that turned out later to be mistakes (examples below). Review your list periodically. Correcting mistakes is more difficult than avoiding them.
- Speaking before thinking about the consequences
- Neglecting to gather facts before making decisions
- Communicating partial information about projects
- Unclear expectations
- Resisting change - trying to keep everything the same
- Never asking for input on decisions from affected people
- Not making time to allow direct reports to tell you of possible problems
- Going for a "Quick Fix" over a lasting solution

## Accepting Criticism Constructively

### Skills, Behaviors, and Attitudes to Adapt and Practice

- Accept negative feedback as performance improvement information. Use it constructively to become more capable on the job.
- Realize that your self-perception of your performance may be different from the perception of others. Learning of the discrepancies in perceived proficiencies can improve your effectiveness.
- Do not become angry or defensive. Giving negative feedback is hard enough - if you make it more difficult, you may stop the flow of valuable developmental information.
- Request feedback - let others know you are open to suggestions. Thank them for their honesty.
- Valid criticism from others, when properly given, can make the difference between success and failure - it provides us with feedback about what is working and what is not.
- The more accepting you are towards criticism and its inevitability, the better you can use criticism to your advantage.
- If you say nothing or accept criticism as valid before assessing it, you will appear to have little self-confidence and may lose the respect of others and yourself.
- You may not truly understand what the person giving the feedback intended unless you take time to access the criticism.
- Decide what action, if any, you want to take with criticism.
- Two foundations for handling criticism effectively are self-confidence and high self-esteem.
- When faced with unjustified criticism, force yourself to avoid counter criticism. Avoid words like always, never, all the time, and every time.
- Admitting the truth is very effective when handling valid criticism.
- The most powerful technique for handling valid criticism is to request specific feedback.

### Challenging Activities

- Learn to think of negative feedback as positive suggestions on how you can do better, rather than as personal criticism. The following guidelines will help you use feedback to your advantage:
- Listen attentively to feedback until the speaker is finished, ready to hear your response.
- Do not use the phrase "Yes, but . . ." - eliminate it from your vocabulary. Rather than justify, stop talking and listen.
- When you explain your viewpoint, paraphrase the feedback and demonstrate your understanding of what you heard.
- Ask yourself questions such as, "Do I understand exactly what was said? Is the criticism something I can do something about? What would happen if I acted on the feedback?"
- Do you want to change your behavior or do you need more information?

## Identifying and Pursuing Resources Needed to Improve Performance

### Skills, Behaviors, and Attitudes to Adapt and Practice

- Keep growing and changing - it is the law of nature and of business.
- Improve skills you already possess and learn new ones.
- Stay current with business-related information, because it quickly becomes outdated.
- Take a self-directed approach to learning - do not wait for someone to push you.
- Learn something from each person with whom you work.
- Learn to look at negative feedback as potentially useful information that you need to understand more fully. Examine what you do with the lessons learned from feedback and experience.
- Admit your weaknesses and surround yourself with people who are skilled in areas where you are weak. Recognize your strengths and broaden and improve them by finding new ways to use those skills by teaching them to others and accepting assignments that stretch your skills even further.

### Challenging Activities

- For three weeks, set aside a regular time for reading major publications in your field and industry, including articles and books outside your area of expertise. Look for one insight or application in everything you read - draw conclusions and search for meanings relevant to your development.
- Share your development needs with others including your manager and direct reports. Solicit and be open to the comments and insights of others. Identify people who have expertise in areas where you need development and learn from them.