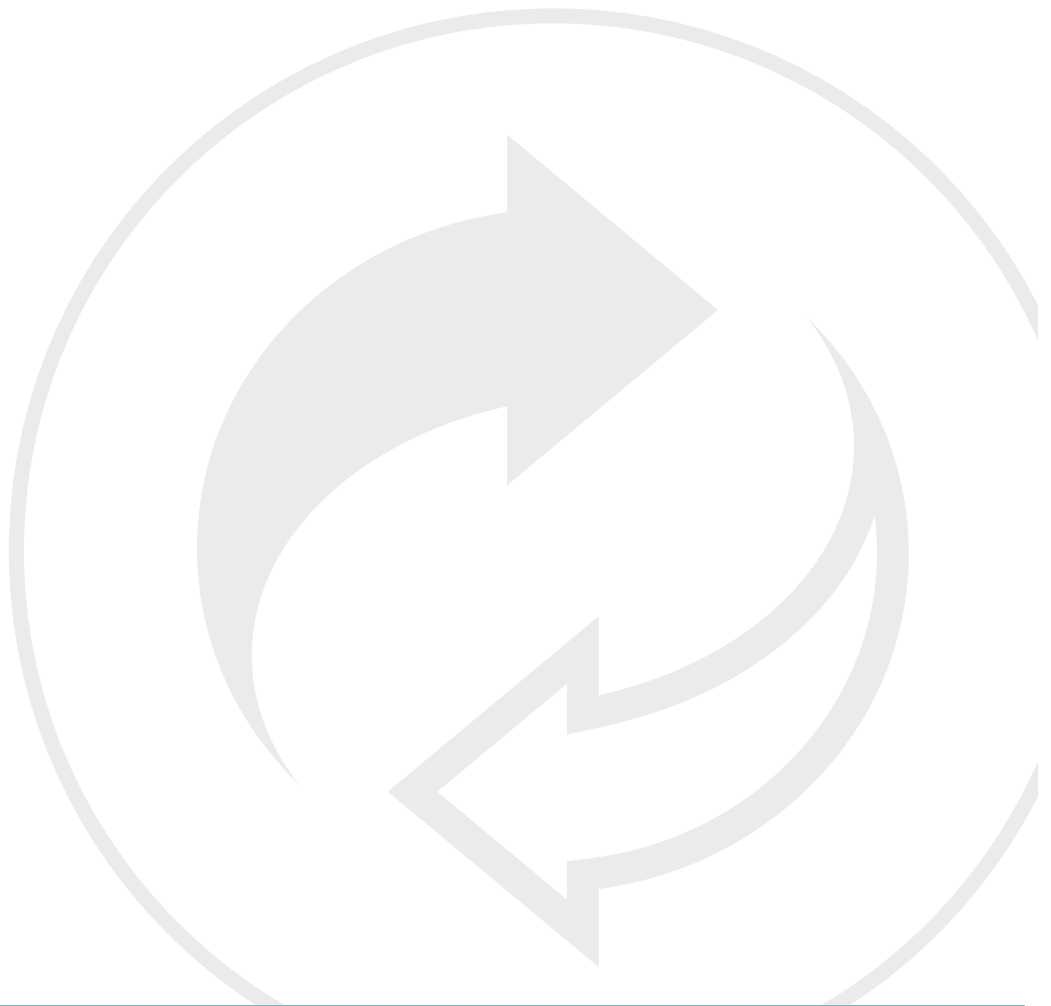




LEADERSHIP[®] VERSATILITY INDEX

U.S. PATENT NO. 7,121,830



PREPARED FOR

PAT SAMPLE
January 2019

POWERED BY



KAISER
leadership solutions



LVI

U.S. PATENT NO. 7,121,830

LEADERSHIP[®]
VERSATILITY
INDEX

PAT SAMPLE

VICE PRESIDENT
SAMPLE COMPANY

TIME IN CURRENT JOB

0 YEARS, 6 MONTHS

MANAGERIAL EXPERIENCE:

13 YEARS, 3 MONTHS

FEEDBACK FROM 15 TOTAL OBSERVERS

- M** Manager (1)
- O** Other senior managers (2)
- P** Peers (4)
- D** Direct Reports (8)

INTENDED USE

The Leadership Versatility Index[®] is intended to provide feedback for the purpose of raising self-awareness and guiding the development of managers into better leaders. It was not created to provide information for making decisions about hiring, promotion, compensation, or termination and should not be used as the sole source of information for such decisions.

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Leadership Versatility Index, version 5.0
U.S. Patent No. 7,121,830

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Published by
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info@kaiserleadership.com
www.kaiserleadership.com

The LVI's method of assessment was developed by
Bob Kaplan and Rob Kaiser at Kaplan DeVries Inc.

NORMS

For the purpose of comparison, norms are presented from a sample with the following characteristics:

NORM GROUP:

21,596 PARTICIPANTS

RATED BY:

291,961 OBSERVERS

REGION

US/Canada	41.9%
Europe	27.1%
Asia/Pacific	14.6%
Middle East/Africa	9.2%
Latin America	4.6%
Other	2.6%

INDUSTRY

Aerospace & Defense	2.4%
Construction & Materials	2.7%
Consumer Goods	5.3%
Education & Training	2.3%
Entertainment & Hospitality	7.8%
Financial Services	7.9%
Government Agency	4.3%
Health Care	12.4%
Manufacturing & Industrials	15.7%
Media	2.3%
Oil & Gas	3.1%
Professional Services	1.3%
Retail	3.7%
Sport Organizations	0.5%
Technology & Internet	16.7%
Telecommunications	4.1%
Transportation	2.6%
Utilities	0.4%
Other	4.5%

LEVEL

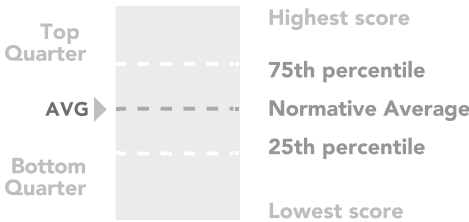
C-suite	8.1%
Executive	36.8%
Director	30.3%
Manager	17.0%
Supervisor	7.7%

DEMOGRAPHICS

	AVG	RANGE
Age (years)	43.3	19 - 80
Managerial experience (years)	12.5	0.25 - 50
Time in current job (years)	3.7	0.25 - 30
Male Female	68.6% 31.4%	

VISUALIZATION OF NORMS

Norms are presented for certain scores with the following graphic:



ASSESSMENT FRAMEWORK

BEHAVIOR MODEL

Versatility is the ability to read and respond to changing conditions with a full range of motion, unrestricted by a bias in favor of some approaches or against others.

The Leadership Versatility Index (LVI) measures versatility on two pairs of leadership dimensions. Each pair is a combination of opposing but complementary behaviors that reflect the tensions and trade-offs that make leadership a balancing act.

The model distinguishes how you lead in terms of your style of interacting with people from what you lead in terms of the organizational issues you focus on.



RATING SCALE

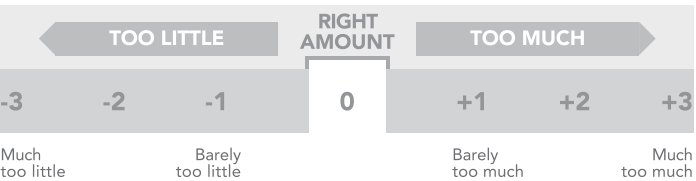
Expanding your versatility is not just about strengthening less developed areas; it can also involve calibrating strengths that you may overuse from time to time.

Rather than evaluating you as “good or bad,” feedback on the LVI advises you which behaviors to emphasize more and which to emphasize less to better reconcile the competing demands of leadership.

How much of a behavior is too little, the right amount, or too much depends on the situation. For instance, cultural values and norms, the business challenge, and the needs of the people you work with help determine how much

of a particular behavior is appropriate.

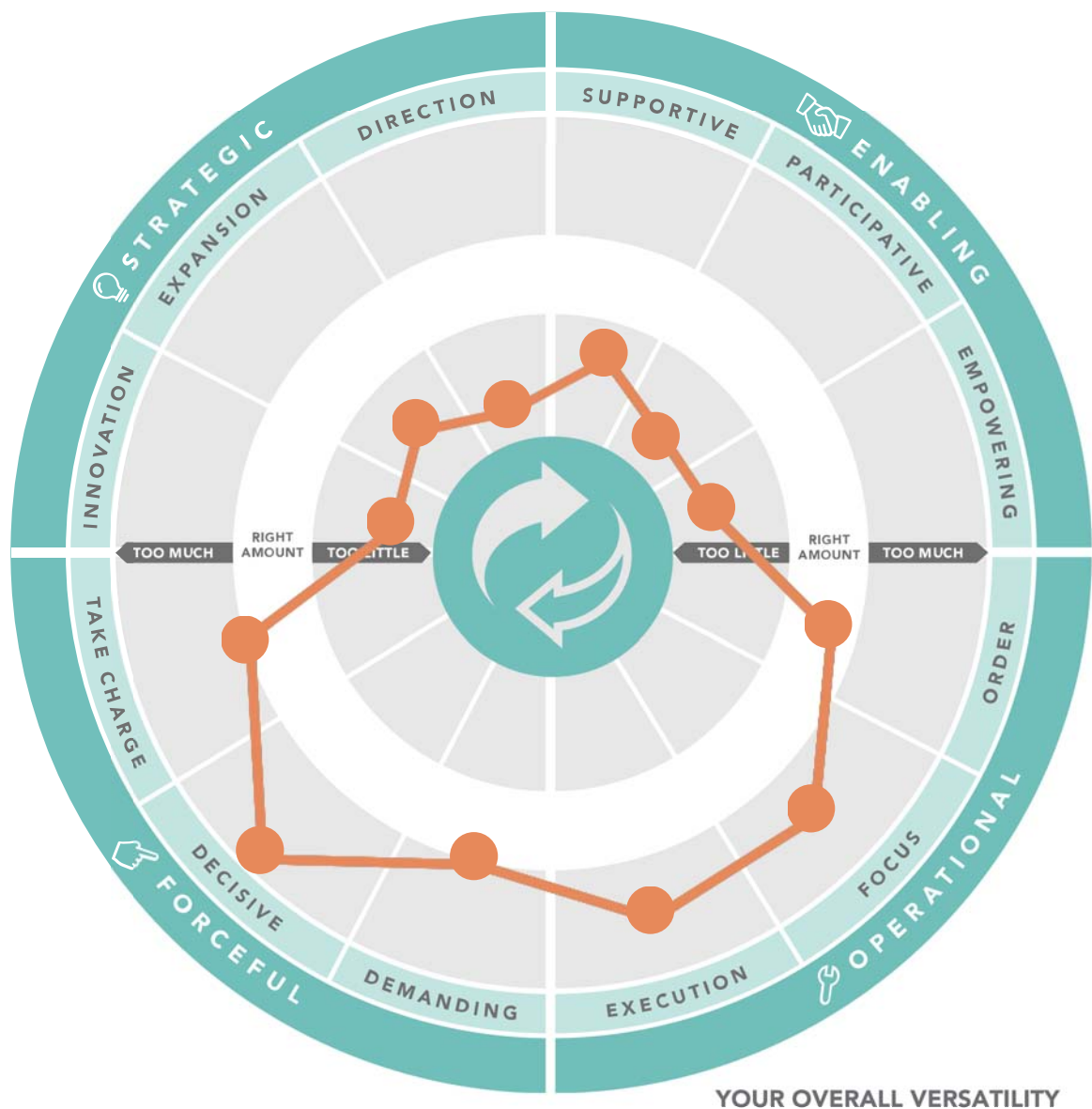
Your behavior was rated on a unique scale. Unlike the typical rating scale where “higher scores are better,” the ideal score is in the middle of this scale, 0, the “Right Amount.”



WRITTEN FEEDBACK

At the end of the report, you will find qualitative, written feedback to supplement the quantitative ratings. The written comments often elaborate and further clarify what the ratings mean. They may also raise some things not covered by the rating items.

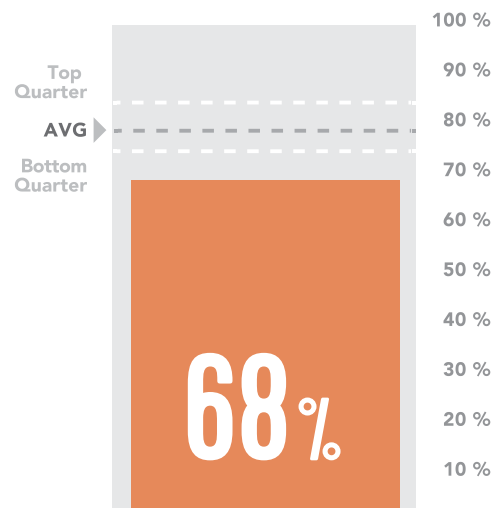
OVERALL PROFILE



These results summarize the overall, 360 view from the 15 observers across the 4 rater groups that provided you feedback. (These results do not include your self-ratings.) The scores are computed as the grand mean: the overall average of the average scores for each of the 4 rater groups. Thus, each rater group contributes equally to the 360 view.

Your overall versatility score is shown to the right. The percentage represents how close your profile approximates a perfectly well-rounded circle. A score of 100% means everything was rated "the right amount;" scores are lower than 100% to the extent that some items were rated "too little" or "too much."

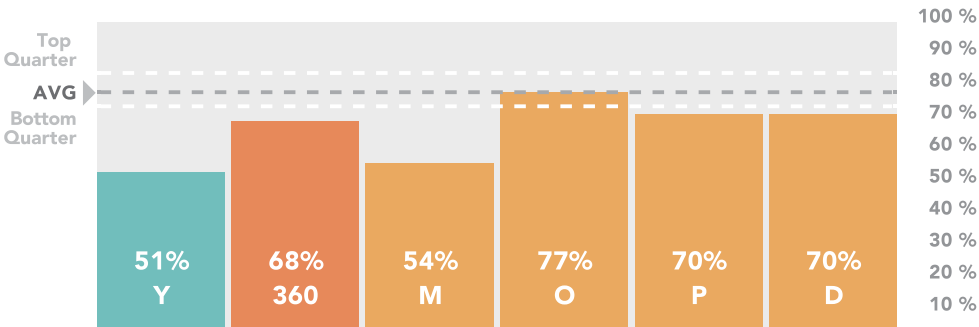
YOUR OVERALL VERSATILITY



HOW YOU LEAD SUMMARY

FORCEFUL-ENABLING
VERSATILITY

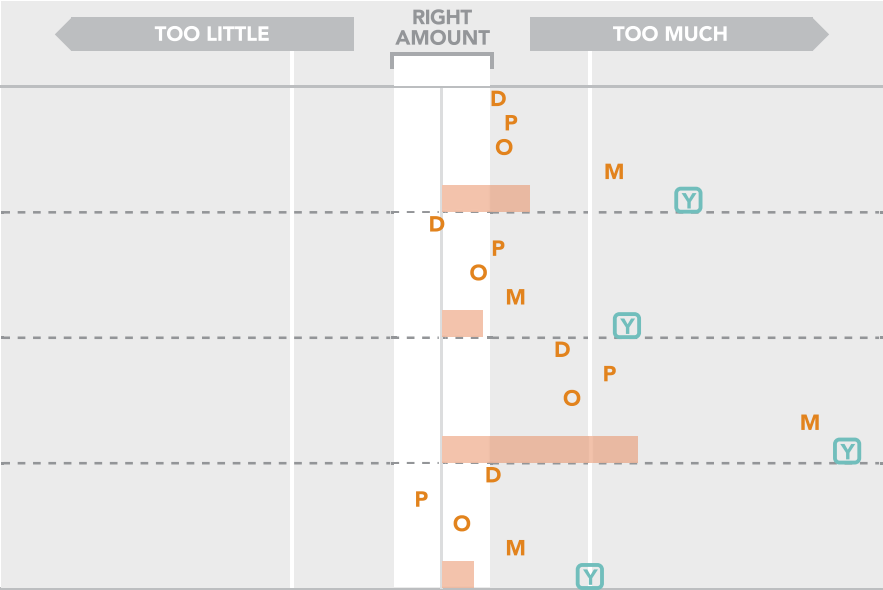
extent to which you are able to both use power personally and to empower others



FORCEFUL

asserting personal and position power

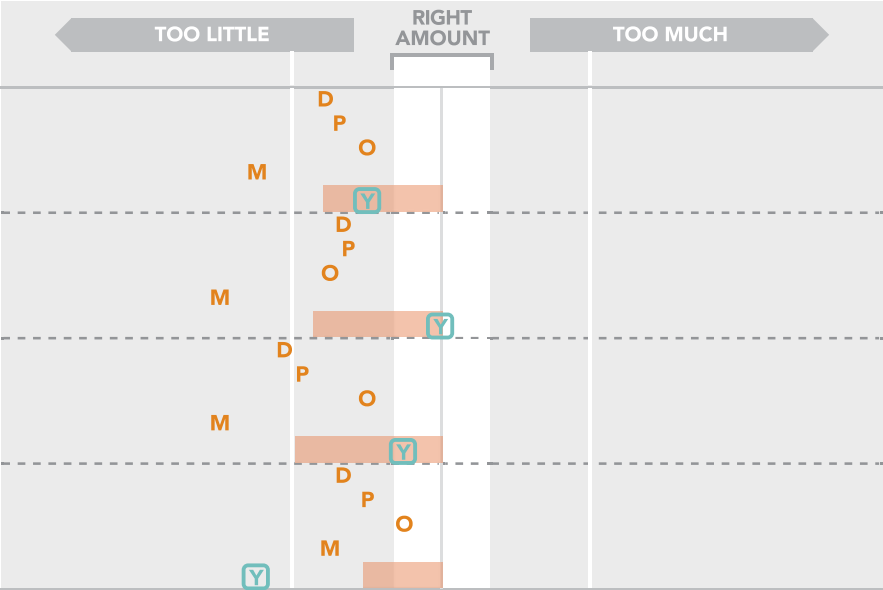
Overall
Take Charge
Decisive
Demanding



ENABLING

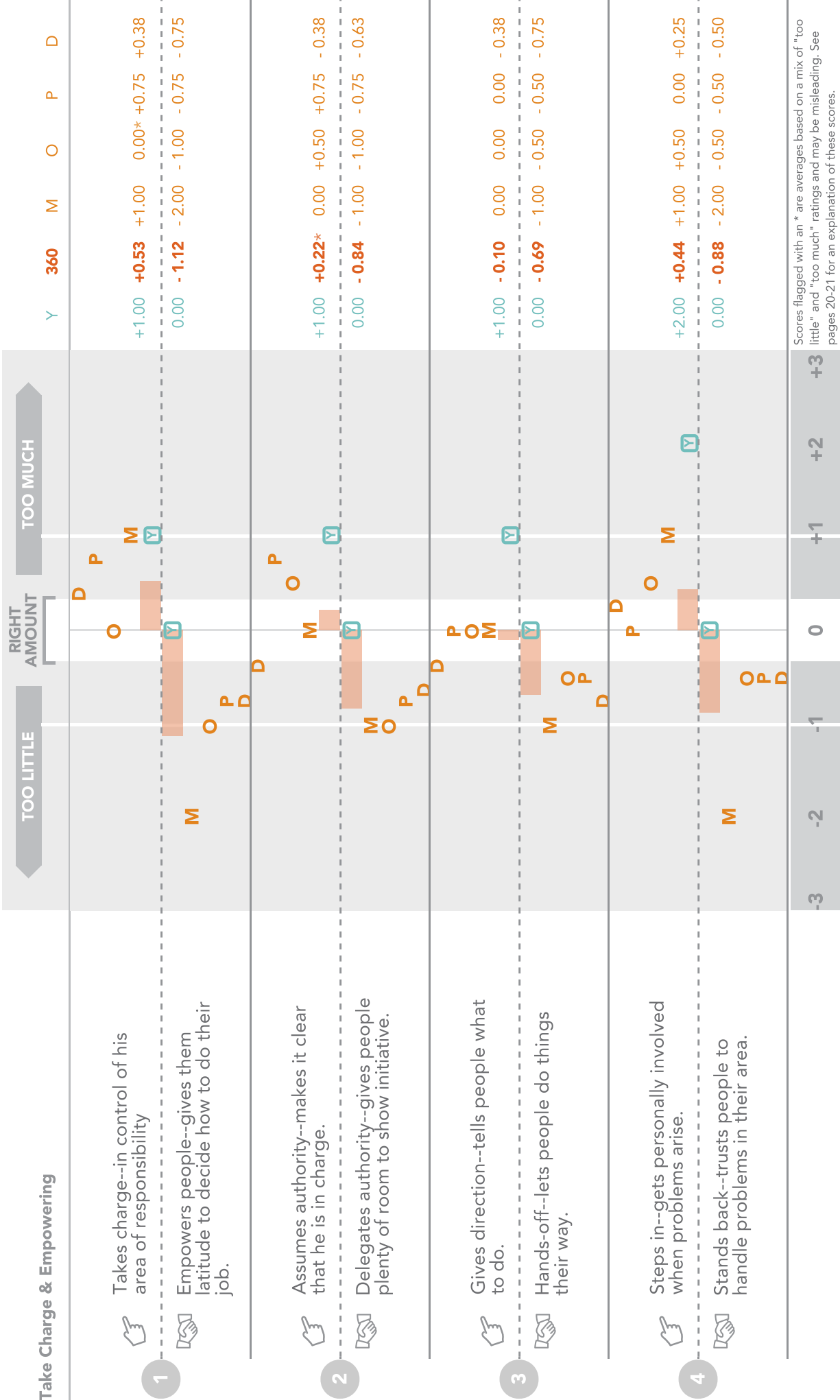
involving others and bringing out their best

Overall
Empowering
Participative
Supportive

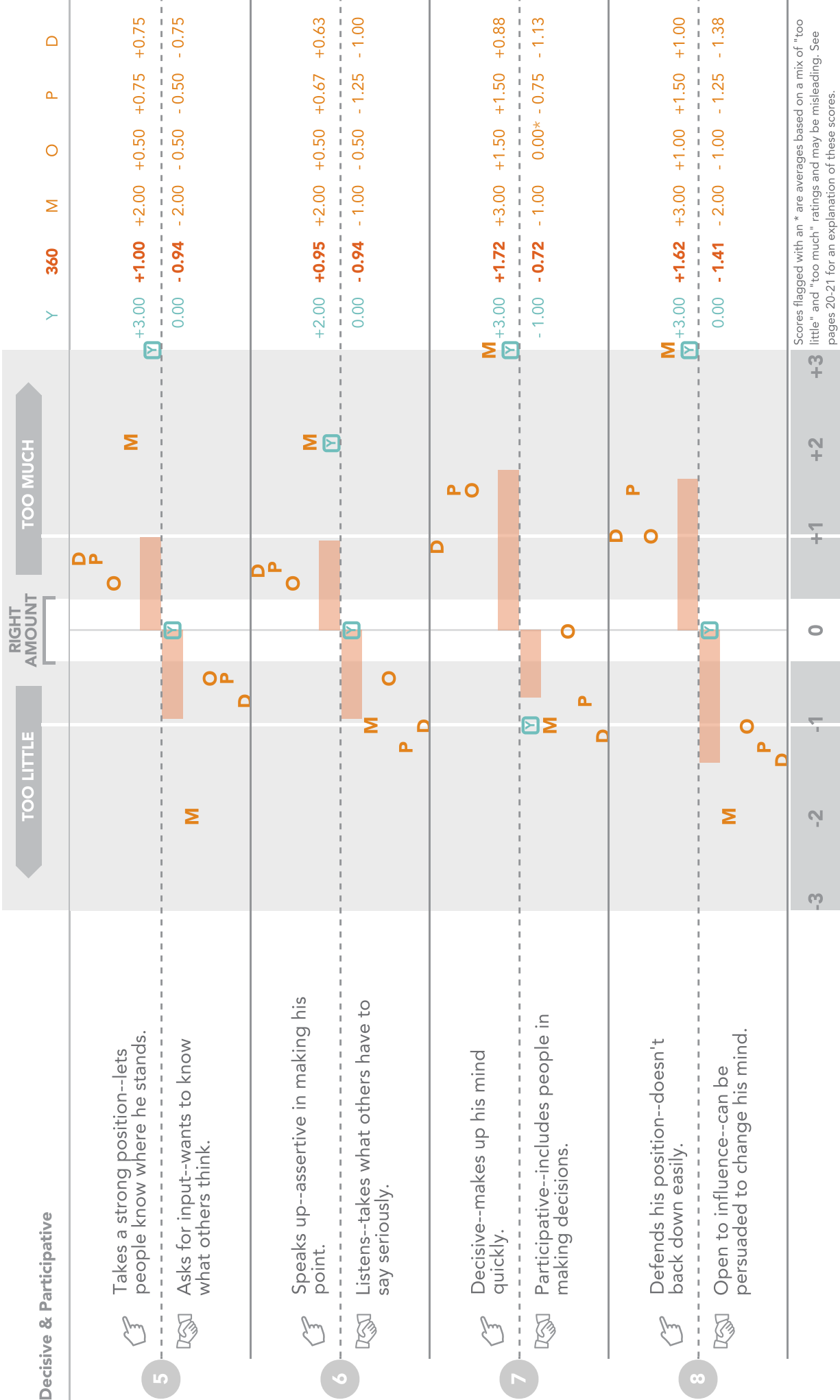


You 360 Avg of M, O, P & D Manager (1) Other senior managers (2) Peers (4) Direct Reports (8)

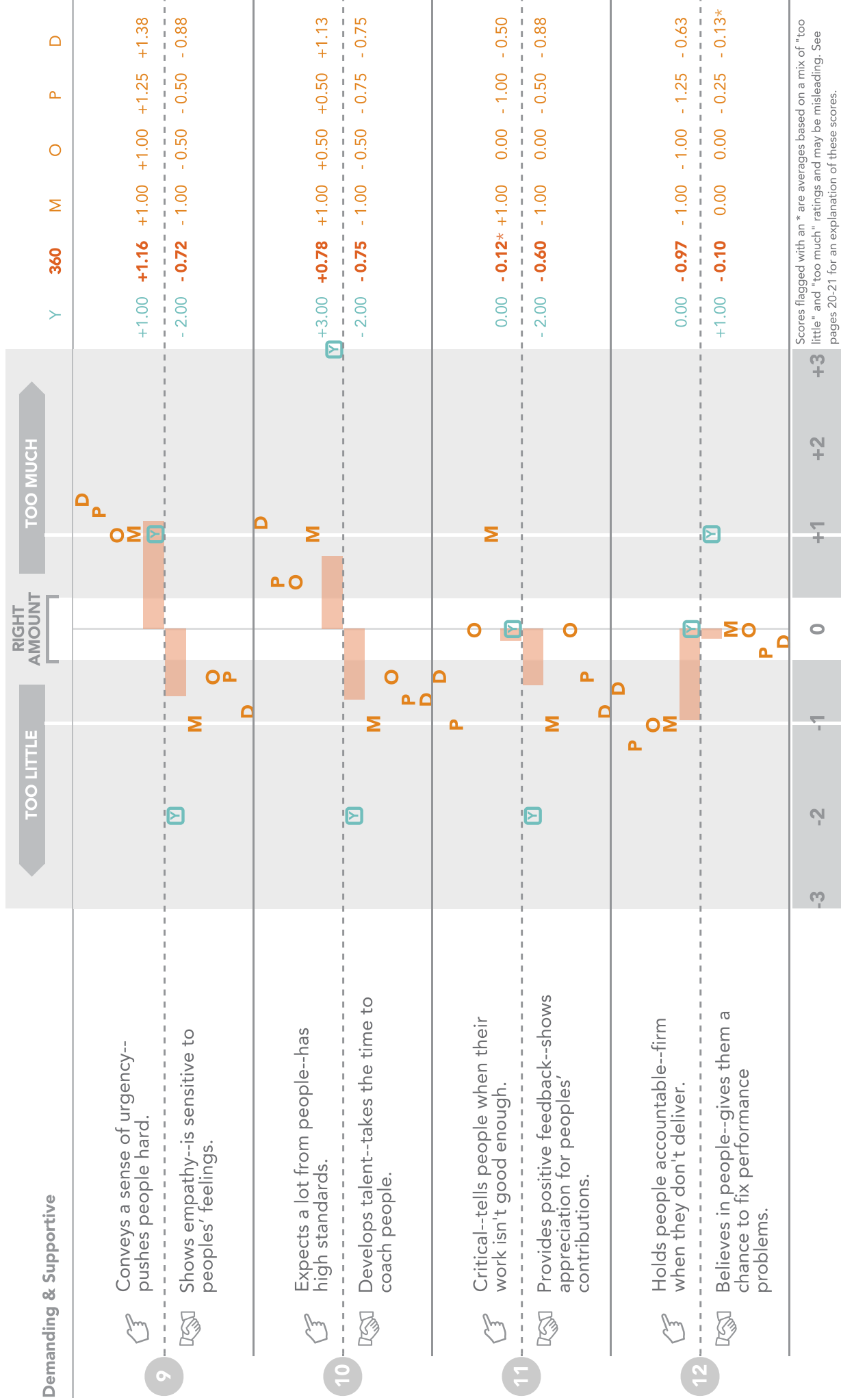
HOW YOU LEAD DETAILED ITEM RESULTS



HOW YOU LEAD DETAILED ITEM RESULTS



HOW YOU LEAD DETAILED ITEM RESULTS



You 360 Avg of M, O, P & D Manager (1) Other senior managers (2) Peers (4) Direct Reports (8)

HOW YOU LEAD DISTRIBUTION OF RATINGS



FORCEFUL



ENABLING

	TOO LITTLE				RIGHT AMOUNT				TOO MUCH			
	M	O	P	D	M	O	P	D	M	O	P	D
Take Charge												
1 In control	0	1	0	0	1	6	8	1	1	1	3	3
2 Assumes authority	0	0	0	3	3	8	4	0	1	3	0	0
3 Gives direction	0	0	0	3	3	12	0	0	0	0	0	0
4 Steps in	0	0	0	1	1	9	5	1	1	0	3	0
Decisive												
5 Takes a position	0	0	0	0	0	6	9	1	1	3	4	0
6 Speaks up	0	0	0	0	0	6	8	1	1	2	4	0
7 Decisive	0	0	0	0	0	4	11	1	2	4	4	0
8 Doesn't back down	0	0	0	0	0	2	13	1	2	4	6	0
Demanding												
9 Pushes people hard	0	0	0	0	0	3	12	1	2	3	6	0
10 Expects a lot	0	0	0	0	0	5	10	1	1	2	6	0
11 Critical	0	0	3	3	6	7	2	1	0	1	0	0
12 Holds people accountable	1	2	3	5	11	4	0	0	0	0	0	0
Total	1	3	6	15	25	72	82	9	12	25	36	
Percentage	8%	13%	13%	16%	14%	40%	46%	75%	50%	53%	38%	

TOTALS Sum across M, O, P & D (15) **M** Manager (1) **O** Other senior managers (2) **P** Peers (4) **D** Direct Reports (8)

HOW YOU LEAD RIGHT AMOUNT RATINGS

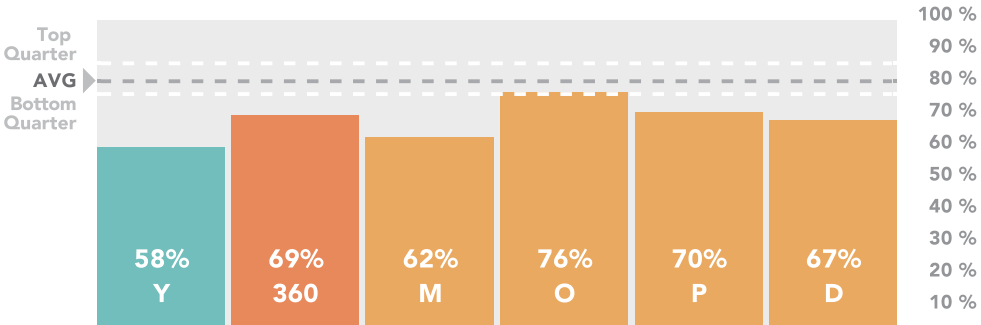
The following counts indicate how often you were rated “the right amount,” indicating that the rater thought you tend to use the behavior to the right degree and in the right situations.

ENABLING												
RIGHT AMOUNT												
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WHAT YOU LEAD SUMMARY

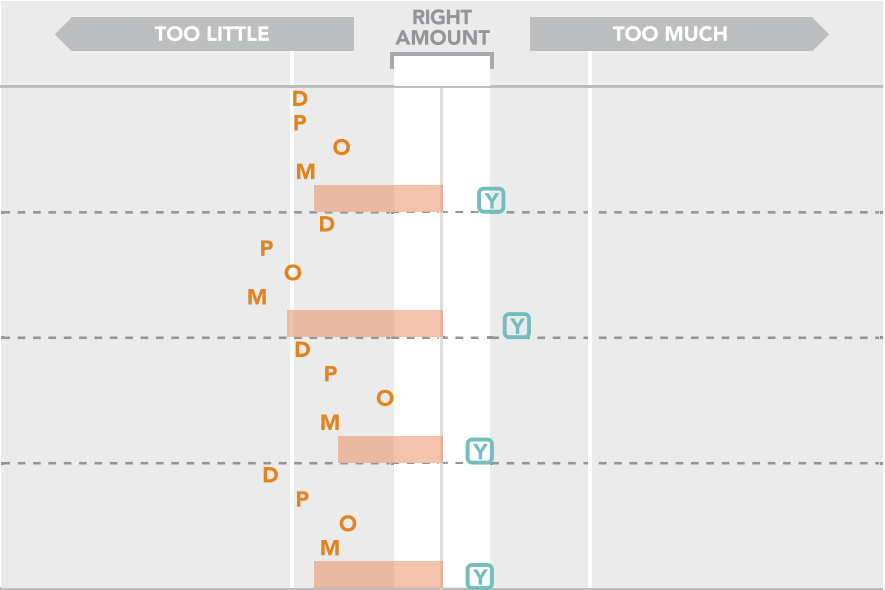
STRATEGIC-OPERATIONAL VERSATILITY

extent to which you are able to both envision the future and execute to make it happen



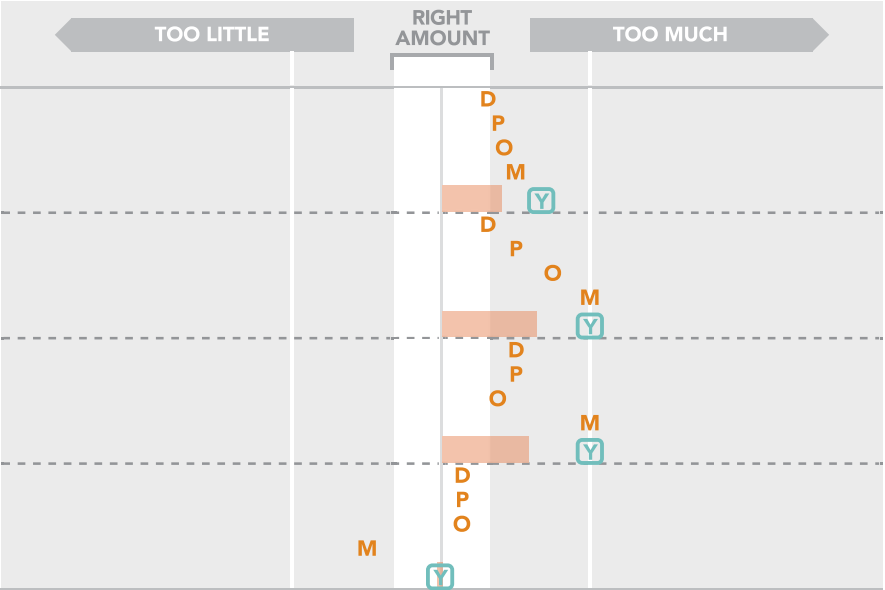
STRATEGIC
positioning the organization for long-term success

Overall
Direction
Expansion
Innovation



OPERATIONAL
focusing the organization on the details of execution

Overall
Execution
Focus
Order



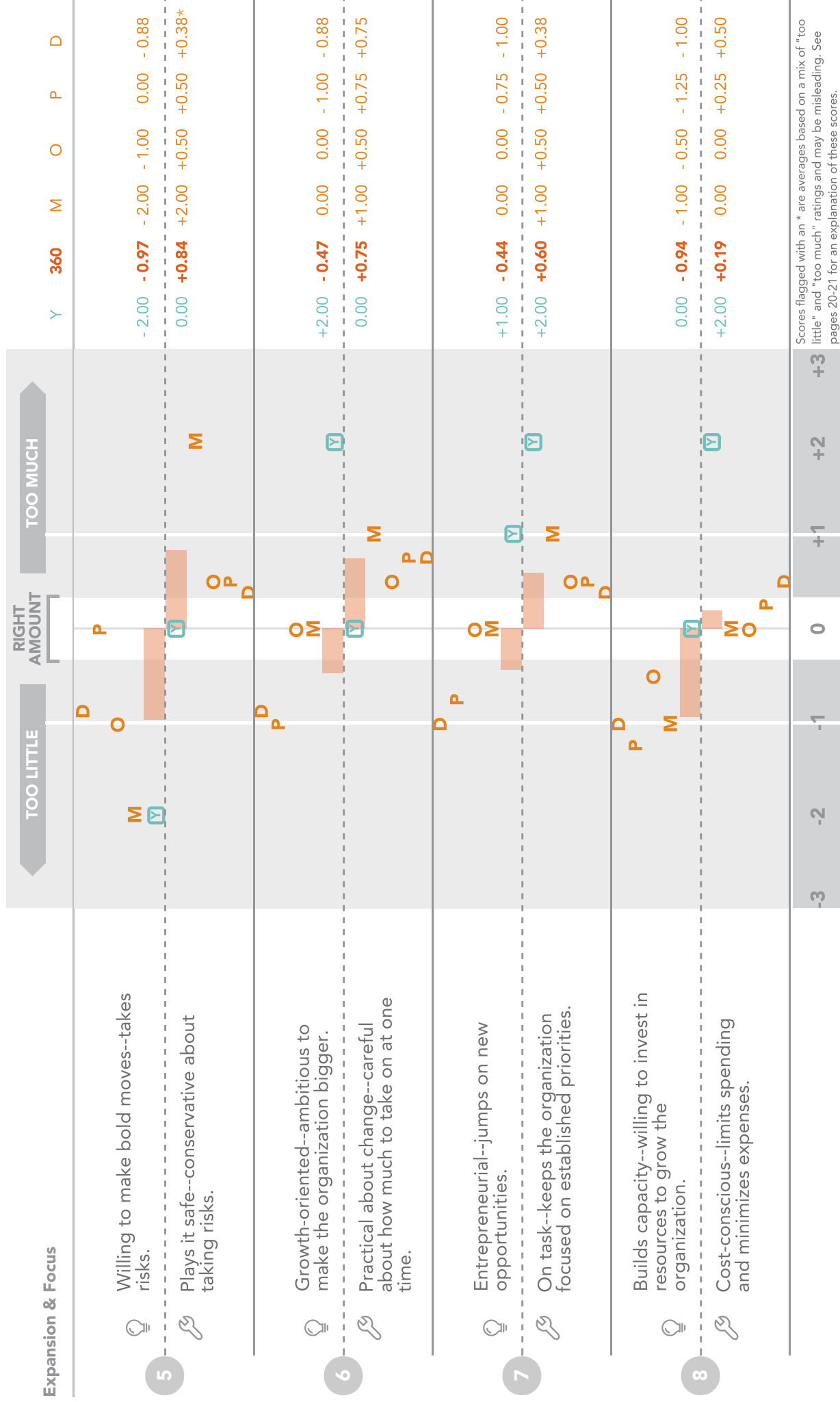
Y You 360 Avg of M, O, P & D M Manager (1) O Other senior managers (2) P Peers (4) D Direct Reports (8)

WHAT YOU LEAD DETAILED ITEM RESULTS

Direction & Execution		TOO LITTLE		RIGHT AMOUNT	TOO MUCH		Y	360	M	O	P	D
1	💡 Thinks strategically--spends time on long-term planning.	P										
	🔑 Head-down--focused on getting things done.											
2	💡 Zooms out--leads from a high-level, big-picture perspective.	P										
	🔑 Zooms in--gets involved in the tactical details of execution.											
3	💡 Externally aware--keeps up with developments outside the organization.	D										
	🔑 Inwardly focused--concerned about meeting the needs of internal stakeholders, processes, and standards.											
4	💡 Looks ahead--anticipates the need to change direction.	P										
	🔑 Jumps on problems--quick to react to day-to-day issues.											

Scores flagged with an * are averages based on a mix of "too little" and "too much" ratings and may be misleading. See pages 20-21 for an explanation of these scores.

WHAT YOU LEAD DETAILED ITEM RESULTS



Y You 360 Avg of M, O, P & D M Manager (1) O Other senior managers (2) P Peers (4) D Direct Reports (8)

WHAT YOU LEAD DETAILED ITEM RESULTS

	Innovation & Order	TOO LITTLE	RIGHT AMOUNT	TOO MUCH	Y	360	M	O	P	D
9	<p>💡 Questions the status quo--makes the case for change.</p> <p>🔑 Sticks to the tried and true--relies on what has worked in the past.</p>	D P O	M Q P D		0.00	-0.16*	+1.00	-0.50	0.00	-1.13
10	<p>💡 An early adopter--quick to embrace the latest and greatest.</p> <p>🔑 Disciplined--has everything under control.</p>	P D O M	M Q P D		0.00	-1.19	-1.00	-1.00	-1.75	-1.00
11	<p>💡 Creative--introduces new and original ideas.</p> <p>🔑 Structured--thorough in organizing projects and work flow.</p>	D P M	M Q P D		+1.00	-0.97	-1.00	-0.50	-1.00	-1.38
12	<p>💡 Encourages innovation--creates a safe environment for trying new things.</p> <p>🔑 Follows up--checks in regularly to see how things are progressing.</p>	D P M	M Q P D		0.00	-1.16	-2.00	-0.50	-1.00	-1.13

Scores flagged with an * are averages based on a mix of "too little" and "too much" ratings and may be misleading. See pages 20-21 for an explanation of these scores.

Scores flagged with an * are averages based on a mix of "too little" and "too much" ratings and may be misleading. See pages 20-21 for an explanation of these scores.

WHAT YOU LEAD DISTRIBUTES RATINGS

STRATEGIC										OPERATIONAL																													
TOO LITTLE					RIGHT AMOUNT					TOO MUCH					TOO LITTLE					RIGHT AMOUNT					TOO MUCH														
M					O					P					D					M					O					P					D				
					TOTAL															TOTAL																			
Direction																				Execution																			
1 Thinks strategically					1	1	4	4	10	5	0	0	0	0	0	0	0	0	0	0	0	7	8	1	1	2	4												
2 Big-picture perspective					1	2	2	4	9	5	1	0	0	0	1	0	0	0	0	0	6	9	1	1	3	4													
3 Externally aware					1	2	2	5	10	5	0	0	0	0	0	0	0	3	3	9	1	2	2	4															
4 Looks ahead					1	2	2	4	9	6	0	0	0	0	0	1	4	5	10	0	0	0	0																
Expansion																				Focus																			
5 Takes risks					1	2	0	4	7	8	0	0	0	0	0	0	2	2	6	7	1	1	2	3															
6 Growth-oriented					0	0	2	3	5	10	0	0	0	0	0	0	0	5	10	1	1	3	5																
7 Entrepreneurial					0	0	2	5	7	7	1	0	0	0	1	1	7	7	1	1	2	3																	
8 Builds capacity					1	1	4	5	11	3	1	0	0	0	1	1	10	4	0	0	1	3																	
Innovation																				Order																			
9 Questions the status quo					0	1	0	4	5	9	1	1	0	0	0	0	0	9	6	0	1	2	3																
10 Early adopter					1	2	4	4	11	3	1	0	0	0	1	1	7	7	1	0	2	4																	
11 Creative					1	1	3	5	10	5	0	0	0	0	0	3	8	1	0	1	0	0																	
12 Encourages innovation					1	1	4	5	11	3	1	0	0	0	1	6	9	0	0	0	0																		
Total					9	15	29	52	105	69	6	1	0	0	5	25	87	68	7	9	19	33																	
Percentage					75%	63%	60%	54%	58%	38%	3%	8%	0%	0%	5%	14%	48%	38%	58%	38%	40%	34%																	

















































TOTALS	Sum across M, O, P & D (15)	M	Manager (1)	O	Other senior managers (2)	P	Peers (4)	D	Direct Reports (8)
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WHAT YOU LEAD RIGHT AMOUNT RATINGS





The following counts indicate how often you were rated “the right amount,” indicating that the rater thought you tend to use the behavior to the right degree and in the right situations.

💡 STRATEGIC							🔧 OPERATIONAL						
RIGHT AMOUNT							RIGHT AMOUNT						
Y							Y						
TOTAL							TOTAL						
M							M						
O							O						
P							P						
D							D						
Direction							Execution						
1 Thinks strategically							1 Head-down						
2 Big-picture perspective							2 Involved in tactical details						
3 Externally aware							3 Inwardly focused						
4 Looks ahead							4 Reactive						
Expansion							Focus						
5 Takes risks							5 Conservative about risk						
6 Growth-oriented							6 Practical about change						
7 Entrepreneurial							7 Focused on priorities						
8 Builds capacity							8 Contains costs						
Innovation							Order						
9 Questions the status quo							9 Relies on what works						
10 Early adopter							10 Disciplined						
11 Creative							11 Structured						
12 Encourages innovation							12 Follows up						
Total							Total						
Percentage							Percentage						
5							5						
42%							42%						
69							87						
38%							48%						
2							3						
9							14						
19							25						
39							45						
17%							25%						
38%							58%						
40%							52%						
41%							47%						

RANK ORDER OF ITEMS

		Y	360	M	O	P	D	
	7 Decisive	+3.00	+1.72	+3.00	+1.50	+1.50	+0.88	TOO MUCH
	8 Doesn't back down	+3.00	+1.62	+3.00	+1.00	+1.50	+1.00	
	3 Inwardly focused	-1.00	+1.22	+2.00	+2.00	+0.50	+0.38*	
	9 Pushes people hard	+1.00	+1.16	+1.00	+1.00	+1.25	+1.38	
	5 Takes a position	+3.00	+1.00	+2.00	+0.50	+0.75	+0.75	
	6 Speaks up	+2.00	+0.95	+2.00	+0.50	+0.67	+0.63	
	5 Conservative about risk	0.00	+0.84	+2.00	+0.50	+0.50	+0.38*	
	10 Expects a lot	+3.00	+0.78	+1.00	+0.50	+0.50	+1.13	
	2 Involved in tactical details	+3.00	+0.78	+1.00	+0.50	+1.00	+0.63	
	1 Head-down	+2.00	+0.75	+1.00	+0.50	+0.75	+0.75	
	6 Practical about change	0.00	+0.75	+1.00	+0.50	+0.75	+0.75	
	7 Focused on priorities	+2.00	+0.60	+1.00	+0.50	+0.50	+0.38	
	10 Disciplined	+2.00	+0.60	+1.00	0.00	+0.75	+0.63	
	1 In control	+1.00	+0.53	+1.00	0.00*	+0.75	+0.38	
	4 Steps in	+2.00	+0.44	+1.00	+0.50	0.00	+0.25	RIGHT AMOUNT
	9 Relies on what works	0.00	+0.44	0.00	+0.50	+0.50	+0.75	
	2 Assumes authority	+1.00	+0.22*	0.00	+0.50	+0.75	-0.38	
	8 Contains costs	+2.00	+0.19	0.00	0.00	+0.25	+0.50	
	3 Gives direction	+1.00	-0.10	0.00	0.00	0.00	-0.38	
	12 Gives people a chance	+1.00	-0.10	0.00	0.00	-0.25	-0.13*	
	11 Critical	0.00	-0.12*	+1.00	0.00	-1.00	-0.50	
	9 Questions the status quo	0.00	-0.16*	+1.00	-0.50	0.00	-1.13	
	4 Reactive	0.00	-0.19	0.00	0.00	-0.25	-0.50	
	11 Structured	-2.00	-0.41	-1.00	0.00*	-0.25	-0.38	TOO LITTLE
	7 Entrepreneurial	+1.00	-0.44	0.00	0.00	-0.75	-1.00	
	6 Growth-oriented	+2.00	-0.47	0.00	0.00	-1.00	-0.88	
	11 Shows appreciation	-2.00	-0.60	-1.00	0.00	-0.50	-0.88	
	3 Hands-off	0.00	-0.69	-1.00	-0.50	-0.50	-0.75	
	7 Participative	-1.00	-0.72	-1.00	0.00*	-0.75	-1.13	
	9 Shows empathy	-2.00	-0.72	-1.00	-0.50	-0.50	-0.88	
	10 Coaches people	-2.00	-0.75	-1.00	-0.50	-0.75	-0.75	
	12 Follows up	0.00	-0.75	-2.00	0.00	-0.50	-0.50	
	2 Delegates	0.00	-0.84	-1.00	-1.00	-0.75	-0.63	
	4 Stands back	0.00	-0.88	-2.00	-0.50	-0.50	-0.50	
	2 Big-picture perspective	+2.00	-0.91	-1.00	-1.00	-1.25	-0.38	
	5 Asks for input	0.00	-0.94	-2.00	-0.50	-0.50	-0.75	
	6 Listens	0.00	-0.94	-1.00	-0.50	-1.25	-1.00	
	3 Externally aware	+2.00	-0.94	-1.00	-1.00	-0.50	-1.25	
	8 Builds capacity	0.00	-0.94	-1.00	-0.50	-1.25	-1.00	
	12 Holds people accountable	0.00	-0.97	-1.00	-1.00	-1.25	-0.63	
	5 Takes risks	-2.00	-0.97	-2.00	-1.00	0.00	-0.88	
	11 Creative	+1.00	-0.97	-1.00	-0.50	-1.00	-1.38	
	4 Looks ahead	0.00	-1.00	-1.00	-1.00	-1.25	-0.75	
	1 Empowers	0.00	-1.12	-2.00	-1.00	-0.75	-0.75	
	12 Encourages innovation	0.00	-1.16	-2.00	-0.50	-1.00	-1.13	
	10 Early adopter	0.00	-1.19	-1.00	-1.00	-1.75	-1.00	
	1 Thinks strategically	-2.00	-1.38	-2.00	-1.00	-1.75	-0.75	
	8 Open to influence	0.00	-1.41	-2.00	-1.00	-1.25	-1.38	

Scores flagged with an * are difficult to interpret; they are based on a mix of "too little" and "too much" ratings. See pages 20-21 for an explanation of these scores.





 Forceful
  Enabling
  Strategic
  Operational

Y You 360 Avg of M, O, P & D M Manager (1) O Other senior managers (2) P Peers (4) D Direct Reports (8)

BEHAVIOR THEMES

Items are sorted by scores for the overall 360 view. Items higher on each list were rated closer to 0, the "right amount" (Strengths) or in the more extreme range of "too much" (Strengths Overused) or "too little" (Shortcomings). This page does not include items for which some groups indicated "too little" and others "too much."

Item text is color-coded to indicate whether your self-rating was Too Little, The Right Amount, Too Much or not applicable.

 FORCEFUL	 ENABLING	 STRATEGIC	 OPERATIONAL	
Strengths Overused				
7 Decisive 8 Doesn't back down 9 Pushes people hard 5 Takes a position 6 Speaks up 10 Expects a lot 1 In control 4 Steps in			3 Inwardly focused 5 Conservative about risk 2 Involved in tactical details 1 Head-down 6 Practical about change 7 Focused on priorities 10 Disciplined 9 Relies on what works	TOO MUCH
Strengths				
3 Gives direction	12 Gives people a chance		8 Contains costs 4 Reactive	RIGHT AMOUNT
Shortcomings				
12 Holds people accountable	8 Open to influence 1 Empowers 5 Asks for input 6 Listens 4 Stands back 2 Delegates 10 Coaches people 7 Participative 9 Shows empathy 3 Hands-off 11 Shows appreciation	1 Thinks strategically 10 Early adopter 12 Encourages innovation 4 Looks ahead 11 Creative 5 Takes risks 3 Externally aware 8 Builds capacity 2 Big-picture perspective 6 Growth-oriented 7 Entrepreneurial	12 Follows up 11 Structured	TOO LITTLE




DISCREPANCIES BETWEEN RATER GROUPS

There was conflicting feedback from different observer rater groups on the following items, where one or more group indicated "too little" and one or more indicated "too much." These are the items on which the 360 scores have been flagged with an "*".

	TOO LITTLE	RIGHT AMOUNT	TOO MUCH
 FORCEFUL			
2 Assumes authority	D	M	Y O P
11 Critical	P D	Y O	M
 STRATEGIC			
9 Questions the status quo	O D	Y P	M

DISCREPANCIES WITHIN RATER GROUPS

There was conflicting feedback from raters in the same rater group on the following items, where a quarter or more indicated "too little" and a quarter or more indicated "too much." These items are indicated with **bold orange** font for the number of ratings "too little" (TL), "the right amount" (RA), and "too much" (TM). They are the items on which the rater group scores have been flagged with an "*" in earlier sections of the report. Results for the other rating groups are also presented for the purpose of comparison.

		Y			M			O			P			D		
		TL	RA	TM	TL	RA	TM	TL	RA	TM	TL	RA	TM	TL	RA	TM
	FORCEFUL															
1	In control			1			1	1		1		1	3		5	3
	ENABLING															
7	Participative	1			1			1		1	3	1		6	2	
12	Gives people a chance			1		1			2		1	3		2	4	2
	OPERATIONAL															
3	Inwardly focused	1					1			2		2	2	3	1	4
5	Conservative about risk		1				1		1	1		2	2	2	3	3
11	Structured	1			1			1		1	1	3		3	5	

TLToo Little RA Right amount TM Too Much

Y You M Manager (1) O Other senior managers (2) P Peers (4) D Direct Reports (8)

EFFECTIVENESS AS A TEAM LEADER

Leadership involves getting things done through other people, and all great achievements are the result of people working together. Therefore, the performance of your team is an important indicator of your effectiveness as a leader. Team performance can be represented by two dimensions:

Productivity refers to the quantity and quality of the team’s output.

Vitality refers to how team members feel about the work and working with each other.

You and your observers rated the team for which you are directly responsible on a three-item measure of Productivity and a three-item measure of Vitality. The scale ranged from 1 to 5, where higher ratings indicate more of the attribute in question. Below are the overall results; results for the specific items appear on the next page.



Y

You

Avg of M, O, P & D

M

Manager (1)

O

Other senior managers (2)

P

Peers (4)

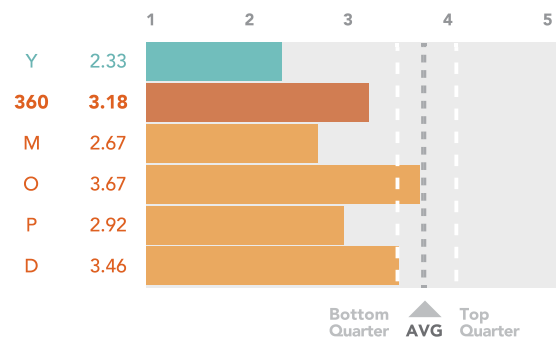
D

Direct Reports (8)

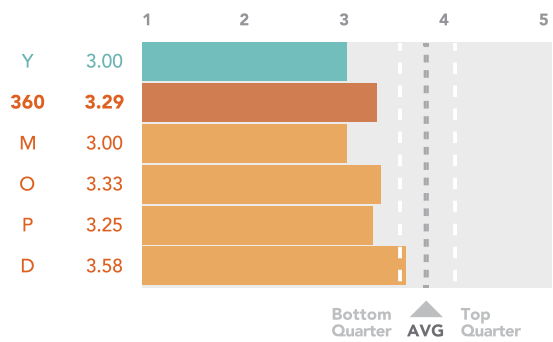
EFFECTIVENESS AS A TEAM LEADER

SCALE SCORES

VITALITY

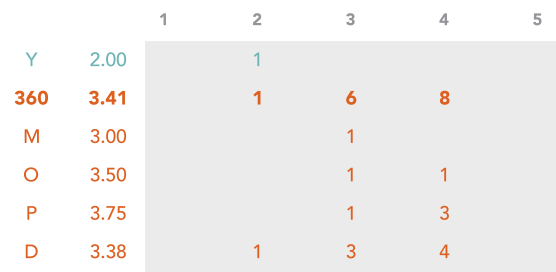


PRODUCTIVITY

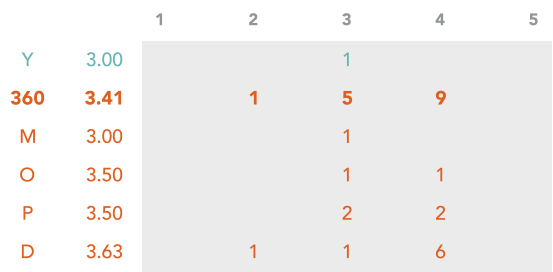


ITEMS SCORES

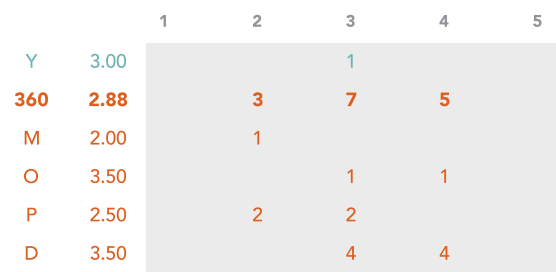
MORALE



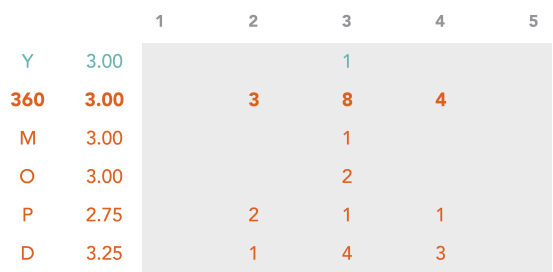
QUANTITY



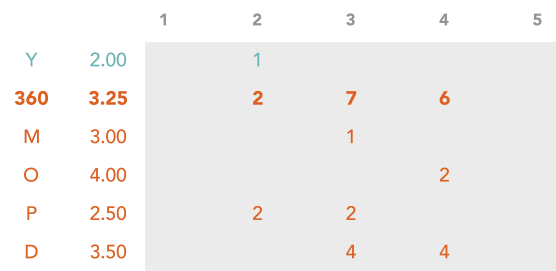
ENGAGEMENT



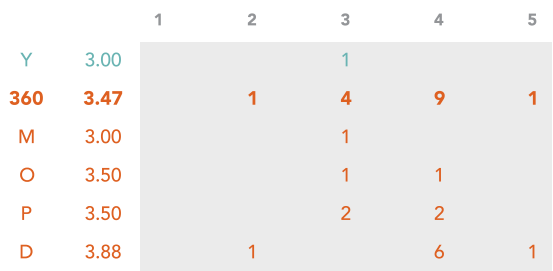
QUALITY



COHESION



OVERALL OUTPUT



Y You 360 Avg of M, O, P & D M Manager (1) O Other senior managers (2) P Peers (4) D Direct Reports (8)

WRITTEN FEEDBACK

1. What are Pat Sample's major strengths as a leader—what do you most appreciate or respect about him/her?

Responses are presented exactly as submitted. Each text block represents a different respondent.

- Y** I am honest and ethical with high principles. I take my responsibility as a leader very seriously. I give everything to my job. And I have deep technical expertise in my functional area with a lot of experience.
- M** Pat is a take-charge manager who really understands the operational side of the business. Intent on getting results. She is very clear where she stands on issues and speaks her mind. And she is a reliable, go-to manager; you can count on her to get the job done.
- O** She has grown up in this company and knows her business very well. She isn't afraid to step up and take responsibility for fixing problems either.
- Pat is known as a hard-charger who will go the extra mile to get results. She has what they call managerial courage. She also has deep experience in manufacturing.
- P** When a decision is made, she takes detailed care in its implementation. Very good drive for results. Makes sure her voice is heard.
- She knows what she wants and does everything to achieve her goals. She is also a great sparring partner to help someone better understand complex situations. She is not afraid of making decisions. She shows courage in her management.
- Understands how the business works, at an intimate, detailed level. She is a natural leader and presses hard for results. Has a big presence.
- Willing to understand any trouble (big or small) or activity and be involved to learn more from it. Pat is really good at understanding problems at a detailed level. She is quick to establish a clear view of alternatives.
- D** Pat is very knowledgeable in her area of expertise; she has a very deep understanding of operations and the supply chain.
- Great with numbers, really quick on her feet, a masterful problem solver. Very analytical.
- One of the best improvisers and problem-solvers I have ever met! She also has a very strong work ethic and stands up for what she believes in.
- Pat is very clear about what she believes should be done. She always takes a position and is quick to let you know where she stands.
- Pat is a natural leader, who knows exactly where she wants her team to go and never gives up until she reaches her targets. She has tremendous drive and focus on results, and she really knows her stuff.
- Pat is a hands-on leader who really knows the business. She also has deep technical smarts due to her experience.
- Pat is pragmatic, fast, and focused on results. She pushes people to perform at a higher level.

Y You **M** Manager (1) **O** Other senior managers (2) **P** Peers (4) **D** Direct Reports (8)

A sense of urgency and drive for results. Pat will do whatever it takes to deliver.

WRITTEN FEEDBACK

2. Does Pat Sample overdo any of his/her strengths? Briefly explain how, by taking them to an extreme, the "strengths become weaknesses."

Responses are presented exactly as submitted. Each text block represents a different respondent.

- Y** I can put too much pressure on the team in order to deliver results. Very demanding, which can bring some loss of confidence from coworkers. Speed can become impatience and too much pressure. I have also learned that I can come on strong, and shut other people down. Can be defensive at times.
- M** Pat leads with her opinion and comes on too strong. She will raise an issue, then proceed to say what she thinks should be done. I admire her initiative, but sometimes she's too quick to speak up. Once she locks onto a position, it is hard to get her to see other perspectives. She intimidates some people with her assertiveness, instead of influencing them in more subtle ways. She can also be very critical of peoples' ideas.
- O** She is very knowledgeable, but can be sometimes seem a bit opinionated. She relies too much on her operational knowledge.
- Pat is a bit impatient—impatient to meet her objectives or the objectives of her unit. She is clearly results-oriented. This orientation could put high pressure on the members of her team. It could be a risk of over-management.
- P** Pat wants to achieve her goals and has difficulties accepting others' points of view. She can be very dogmatic if she thinks she is right.
- Sometimes Pat can be a little bit too aggressive during discussion.
- Sometimes too detail-oriented. Thinks she can manage with an Excel file and a few action plans. More communication and dialogue is needed, not just more numbers.
- Because she is a quick and intelligent person, some people on her team might not follow her mind as fast as expected. They feel frustrated due to the fact that they don't understand what Pat says and don't dare to ask for explanations. Pat should be more careful in this situation and ensure that everybody understands her point.
- D** Very principled but sometimes inflexible. Pat also has high standards, but often expects too much from people.
- Pat can sometimes be aggressive toward her team in her willingness to get the best out of them.
- Can be very arrogant, especially toward weak people. She thinks from an operational perspective, can be limited in her ability to see things from a sales and marketing perspective.
- As results-oriented, she can be a bit narrow-minded and short-sighted. For instance, she sometimes says no to good ideas and new approaches because there will be a learning curve.

Y You **M** Manager (1) **O** Other senior managers (2) **P** Peers (4) **D** Direct Reports (8)

She is a great problem-solver and knows the technical side of the business inside and out; however, she tends to get too involved in solving technical problems, to the point of micromanaging some times. She typically does this in the operational area. I have never seen her micromanage in other areas.

She is very smart, but can also jump too conclusions, without considering all the relevant facts. This could be perceived as a strength turned into a weakness.

Too impatient—changes are not so easily accomplished in the reality of that on the spread sheet. Could burn people out.

Pat is really strong in operations, but she also has a tendency to swoop in and take over on tactical matters that are frankly beneath her.

WRITTEN FEEDBACK

3. Does Pat Sample have any shortcomings—areas where he/she needs to be stronger or do more?

Responses are presented exactly as submitted. Each text block represents a different respondent.

- Y** I need to spend more time planning ahead. I have lots of ideas for where to take this unit, but need to spend less time reacting and more time on strategic planning. It is difficult because so much of our results depend on execution. And there is a lot of pressure to deliver in the near term. I could also delegate more. I could also be more open to other points of view.
- M** Pat needs to show more interest in other people's ideas, among her peers and especially on her team. I sometimes think she leaves money on the table by teeing up an issue and offering her solutions and ideas out of the gate. If she could slow down, introduce a problem, and solicit input, she would have greater buy-in and probably better quality solutions. This is especially so in areas outside her realm of expertise and experience.
- O** Pat could get more out of her people. She should draw them out more, invite their ideas and participation more. Her organization is centered around her and this limits how much her people can contribute.
- Pat should be more strategic in her approach.
- P** Pat sometimes doesn't know what she doesn't know. Sometimes she could be more humble and seek more information rather than appear like she has all the answers.
- Pat could sharpen her people skills. She could especially be a better, more active listener.
- Collaboration. She is too focused on her team and shows little interest in lateral teams.
- I'm not sure that Pat is a strategic thinker. Most of her concerns are minute-by-minute. I sometimes think she sacrifices the long term for short-term results.
- D** Pat sometimes seems risk averse and unwilling to change. She is not receptive to fresh ideas. Pat is kind of a loner in that she doesn't seek input. She could also show more appreciation.
- She is not very inclusive. She doesn't involve people in the major decisions that affect them.
- I don't think Pat fully understands the business, especially the sales and marketing functions. She has little experience in these areas and tends to avoid them, to the point of being out of touch.
- Pat isn't a very good listener. Sometimes when you raise an issue, you can tell her mind is somewhere else.

Y You **M** Manager (1) **O** Other senior managers (2) **P** Peers (4) **D** Direct Reports (8)

Pat could be more realistic about what can and can't be done. Her expectations are too high and this has her issuing too many priorities. A more realistic appraisal of what is feasible would give us greater focus.

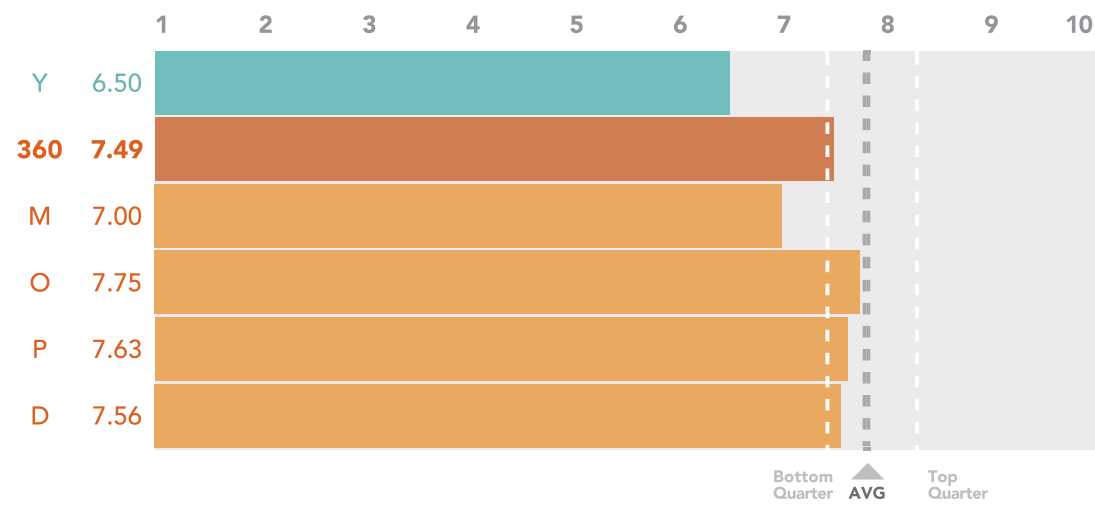
Pat could be more patient. Her urgency is appreciated, but sometimes she charges on without all the information. She is also too busy doing to think about what we are doing.

Sometimes I wonder if Pat trusts us. She doesn't delegate as much as she should. She is also not always willing to try other peoples' ideas.

It sometimes feels as if she doesn't appreciate the way a business functions. It is obvious that she favors Ops and is not interested in the marketing side.

WRITTEN FEEDBACK

4. Please rate Pat Sample’s overall effectiveness as a leader on a ten-point scale where 5 is adequate and 10 is outstanding.



Please explain what is effective about Pat Sample's leadership and what it would take to get a higher rating.

Responses are presented exactly as submitted. Each text block represents a different respondent.

- Y 6.50** Because of speed, reactivity, strong focus, and good results. Increasing trust and delegation would enable me to do more and bring more effectiveness. I could be more open-minded, and perhaps less defensive and outspoken.
- M 7.00** Pat is a driver and pushes for results, which are usually good. She could do better at forming peer relationships. She needs to learn how to be better at give and take, and not always have to win the debate. Pat needs to be less reactive, and more strategic about how she spends her time. She also needs to learn how to work through a team.
- O 8.00** With her business knowledge and her people skills, she is easily accepted by the team and can focus on real issues rather than on conflicts. To get a higher rating, she needs to think more strategically and less tactically. I'd like to see her analyze whether an initiative should be done, rather than how it could be done.
- P 8.00** I think Pat is already a far better-than-average manager. She still needs to create some distance from her team's work in order to better empower her staff. It would help a lot with her peers to be more open and less defensive.

7.00 Be more constructive and cooperative with the rest of our team. Be more trusting of her own team, clarify the ground rules (who decides what, based on what information, for what aim or objective), and control your feelings more in public. Also, manage using criticism and praise at right time (praise in public and, critique in private).

7.50 A challenging leader that will help us to progress in many fields. Could reach the same results by more consensual ways. Be more supportive when people are in trouble. Let them have time to work on the issues: additional reporting doesn't help to solve the problems.

8.00 Pat is overall a good manager. To improve, she will have to get a wider picture and learn to manage high-level people.

D 8.00 I think Pat is a great leader as is. We need more of her kind of drive and relentless pursuit of results.

7.50 To get a higher range, Pat has to improve her way of treating people and has to learn to sometimes be more patient for her direct reports who are not always as smart/quick as she is.

6.00 I think she could increase her effectiveness by showing more interest in every functional area, especially sales and marketing.

7.50 Pat doesn't treat people with the respect they deserve. She pushes hard, but could get more done with less churn if she used a softer touch.

7.00 Because she is so intense and keen on delivering and she knows a lot about the business. She needs to focus on fewer priorities and doing less herself and delegate things.

8.00 Pat is a very good manager. Efficiency, rapidity, and courage are her greatest strengths. She could learn more about other parts of the business.

8.00 Because she is able to run her business in every aspect of it. She could include people more and be more open to other ways of thinking.

8.50 She is a great operational leader. She could soften up a bit and show more appreciation for everyone's efforts.

5. What words of encouragement do you have to offer Pat Sample?

Responses are presented exactly as submitted. Each text block represents a different respondent.

- Y** Trust myself and lighten up a bit. Learn to trust others and step back.
- M** Pat has her heart in the right place. She is making strides in the right direction. My advice is to seek first to understand, then to be understood.
- O** Pat continues to be someone we can count on. Just know that we believe in you, Pat.
- Hang in there. You have achieved a lot already, and can achieve even more.
- P** Pat has a lot of gifts, and I admire her deep knowledge of operations.
- I like working with Pat and think she adds a lot to our team.
- Take the leap of faith, Pat: take a chance, trust people, and see what happens. You'll be surprised by how much people can do if you show you believe in them.
- Trust your peers, Pat. We're on your side.
- D** Pat, you don't have to always know everything. We already know you know a lot!
- I have a lot of respect for Pat. She knows more than I will ever know about this business.
- I hope Pat isn't discouraged by this feedback. It may not all be positive, but if you can take it in, you'll be the stronger leader for it.
- Just remember what you already know: treat people like you want to be treated. You already have our respect.
- I think Pat is one of the best leaders in the company. Keep it up!
- Trust yourself, Pat. You know what you are doing.
- You have helped me raise my game by challenging me. Thank you.
- Pat has a very bright future. If she can add on the strategic and people-skills pieces, she will be an extraordinary leader.

Y You **M** Manager (1) **O** Other senior managers (2) **P** Peers (4) **D** Direct Reports (8)