

Guidelines for Use of Leadership Assessments

This report summarizes the results of an assessment conducted as part of a leadership development process. The purposes of the leadership development process are to provide the participant an opportunity to reflect on personal strengths and developmental needs, to receive objective, data-based feedback, and to receive coaching on professional/career growth. The assessment results are also intended to help the participant's supervisor understand how to best utilize strengths and facilitate learning and development.

The findings and recommendations in this report are based on interview, psychometric, and 360 degree survey feedback data. The following data sources were used as input:

- An in-depth Career Interview.
- The *Watson-Glaser II Critical Thinking Inventory*, a measure of judgment and decision-making tendencies.
- The *Motives Questionnaire (MQ)*, a measure of motives, preferences, and values.
- The *Occupational Personality Questionnaire (OPQ)*, a personality and work styles inventory.
- The *Hogan Development Survey*, an inventory of leadership styles and potential behavioral risk factors.
- A custom 360 degree feedback survey measuring behaviors from CLIENT's Leadership Competency Model (L1)

The information contained in this report, along with other relevant data, can be used to structure a developmental plan for the participant. The information in this report is considered confidential and for the eyes only of the participant and others in the organization (e.g., supervisor, HR representative) who have an official role in the participant's development.

Results from this assessment should only be used in combination with other relevant information (e.g., performance appraisals, track record of achievement, experience, career goals, technical and functional expertise, supervisory recommendations, etc.) when making decisions about the individual's placement and development. The information in this report has a shelf-life of three years; individuals grow and change over time, so this data should not be considered beyond the three-year time frame.

To ensure the most helpful, ethical, and constructive use of this report, we recommend the following procedures:

- Keep the report in a confidential file separate from the regular personnel file.
- Maintain careful control of its distribution, permitting only those persons directly concerned with the development and placement of this individual to see the report.
- Refrain from reproducing any or all parts of the report.
- Refrain from allowing non-professionals to interpret these results either to the individual participant or the organization. Please consult and utilize the executive coach who conducted the assessment

and authored the report to interpret any questions about the data underlying the report, their proper interpretation, and/or implications that may or may not reasonably follow.

Leadership/Work Style Characteristics

The section should be a narrative overview of the assessment results. Generally you will want to cover:

- Brief background and experience overview
- Salient leadership and work style characteristics
- Motives and values
- Ambitions and future prognosis

As you prepare this overview, differentiate between conclusions drawn from assessment data vs. 360 data

Mr. Pat Sample xxx. Pat xxx.

Xxx. Xxx.

Xxx. Xxx.

Xxx. Xxx.

Over the long term, Pat xx and xxx.

In these sections highlight the top 3 +/- Strengths and top 3 +/- Improvement Opportunities. Generally it will be 3 of each and will take up one full page.

■ Key Strengths to Leverage

1. Xxx. Xxx.
2. Xxx. Xxx.
3. Xxx. Xxx.

■ Improvement Opportunities

4. Xxx. Xxx.
5. Xxx. Xxx.
6. Xxx. Xxx.

Make 3-4 recommendations for development, keeping in mind that at most 2 or 3 will likely be used in the development plan. In making the recommendations strive to:

- explain how the individual can “play to their strengths,” using them in a more fulsome manner, teaching the organization/others to learn and model their strengths, and leveraging the strong skills to pull along the weaker skills (for example, a great sales person who listens to customers but not co-workers ... has the behavior in his/her repertoire but needs to pull it out and use it more to develop a more participatory leadership style)
- make specific, concrete recommendations for improvement in addition to the general concepts
- be hard-hitting but at the same time positive and affirming

Recommendations for Development

More Actively Practice Xxx

Xxx.

Develop Xxx and Xxx

Xxx.

Increase Use of Xxx

Xxx.

In the Concluding Remarks, give a brief overview and prognosis. End on a positive and affirming note.

Concluding Remarks

In conclusion, Mr. Pat Sample is a talented individual who has the capability to Xxx.

Appendix: Leadership/Behavioral Tendencies and Co-Worker Perceptions At-A-Glance

The following chart summarizes Leadership Assessment results up against a CLIENT's executive competency model, comparing and contrasting these with the behaviors as perceived by co-workers in the 360 degree feedback survey. The Leadership Assessment results are based on personality and work style measures and should be considered behavioral predispositions and potentials only, not absolutes in terms of job performance. The 360 Degree Survey results are based on quantitative and narrative data from the 360 Degree Feedback Survey, where the general rules of thumb are:

Rating of 3.75 or higher = Strength

Rating of 3.50 to 3.74 = Solid

Rating lower than 3.75 with a mixture of high and low ratings within category = Mixed

Rating of 3.49 or lower = Development Need

In this chart, use your professional judgment to illustrate the degree of strength or need in the client's competency language using the bar graph. Strengths are color coded green, development needs are coded red, and solid skills are coded orange. The "Mixed" category should be used when some of the behaviors in the competency category are significantly strong and others are significantly weak. The bar graph "object" can be lengthened or shortened but should terminate in the appropriate box (i.e., development needs in the left hand column, solid or mixed in the middle column, and strengths in the right-hand column. Comments should briefly explain the rating and can be full sentences or sentence fragments.

Competency	Dev. Need	Solid/Mixed	Strength	Comments
1. Leads Strategy and Change Leadership Assessment 360 Degree Survey				Xxx.
2. Models Accountability and Speed Leadership Assessment 360 Degree Survey				Xxx.
3. Creates Innovative Solutions Leadership Assessment 360 Degree Survey				Xxx.
4. Builds Partnerships Leadership Assessment 360 Degree Survey				Xxx.
5. Develops Talent and Self Leadership Assessment 360 Degree Survey				Xxx.
6. Drives Exceptional Customer Service Leadership Assessment 360 Degree Survey				Xxx.

Key – Leadership Assessment

 **Strength** –predisposed to master and excel at the skills/behaviors

-  **Solid Skills** – predisposed to master and perform the skills/behaviors with consistency
-  **Mixed Skills** – may show a mix of mastery on some skills/behaviors and opportunity for improvement on others
-  **Potential Development Need** – may need to work against some natural tendencies in order to master the skills/behaviors

Key – 360 Degree Survey

-  **Strength** –perceived as having mastered and excelled at the skills/behaviors
-  **Solid Skills** – perceived as performing the skills/behaviors with consistency
-  **Mixed Skills** – perceived to show a mix of mastery on some skills/behaviors and opportunity for improvement on others
-  **Potential Development Need** – perceived to have needs for development if the skills/behavior are required on-the-job