

CP360

Report designed for

Paul Donaldson

CheckPoint 360° Competency Feedback System™ Management Report

Report Prepared: March 2, 2014

CONFIDENTIAL

Paul Donaldson Position Title: Chief Executive Officer

Survey Completed: February 27, 2014

This report includes responses from:

Self, 6 Direct Reports, and 8 Board Members

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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** (Paul Donaldson), **Boss** (you), **Direct Reports**, and **Board Members**.

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

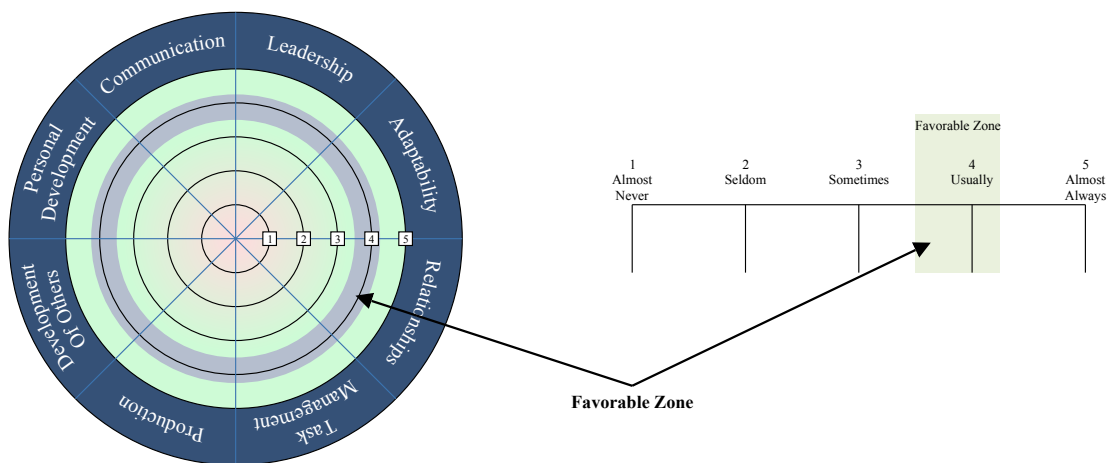
7. Development Of Others

- 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 Management Report

This report summarizes the results of the CheckPoint surveys that the manager (**Paul Donaldson**) and the respondent groups (**Boss, Direct Reports, and Board Members**) recently completed. The scores the manager received are presented in graphs and numeric scales on the pages that follow.

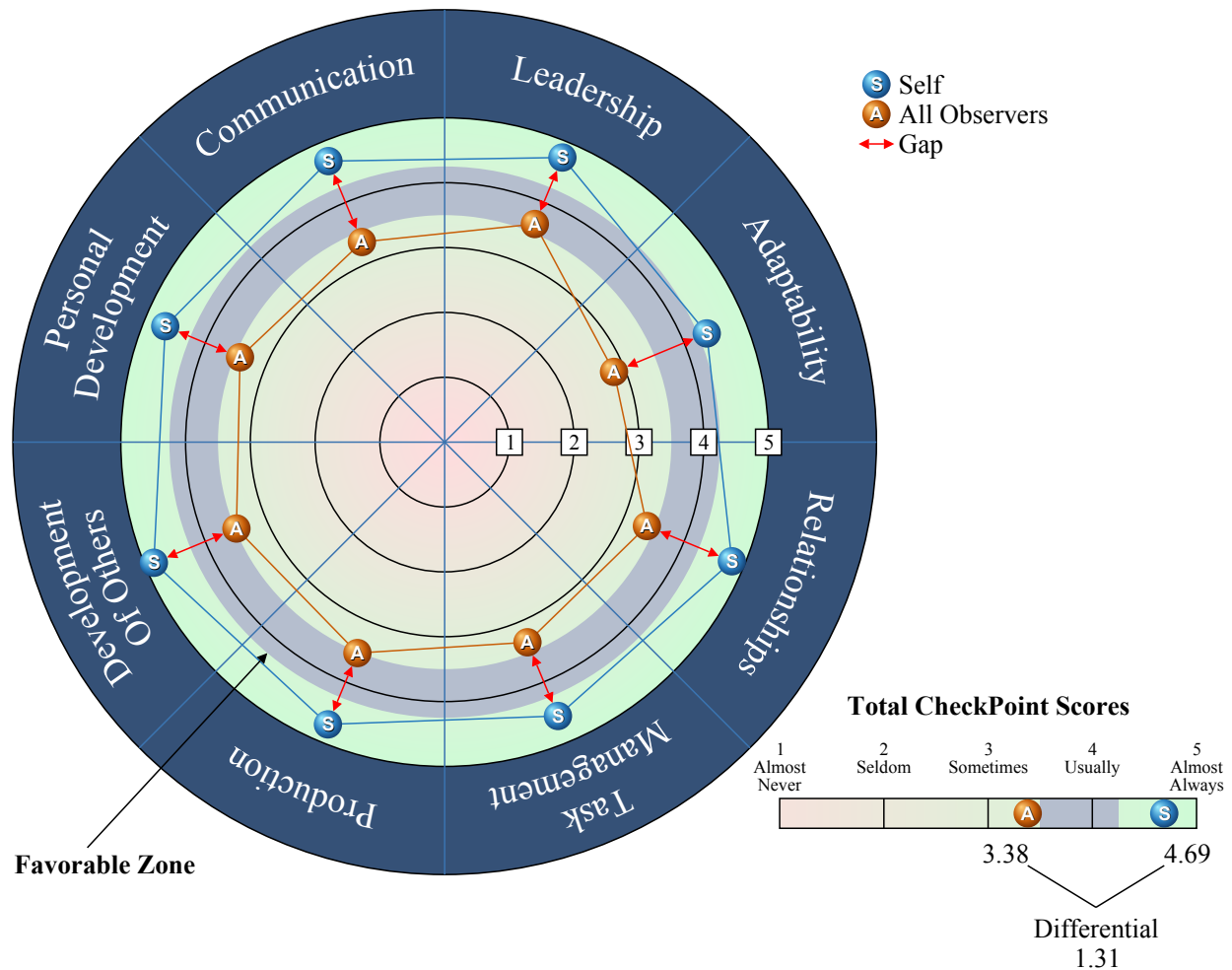
Feedback is reported in the following sections:

- **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 Board Members**) and showing whether scores fall within, above, or below the Favorable Zone. Also 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 providing you an overview of the relative strengths or challenges Paul Donaldson 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, Board Members, and All Observers**), providing Total CheckPoint Scores for each group, and pointing out group score averages that vary by 1 point or more.
- **Skill Set Analysis**: Results for the 18 Skill Sets, comparing the average scores of all respondent groups (includes **Self, Boss, Direct Reports, Board Members, 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. (Paul Donaldson 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 Board Members**).
- **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 Board Members**) 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.

- **Survey Comments**: Each respondent is given the opportunity to volunteer their comments about the manager and the manager's leadership. Any comments which have been made are sorted and then grouped by competency. They are shared with you in this section of the report.
- **Development Summary Overview**: Describes the strengths and development needs Paul Donaldson may have for the 18 Skill Sets.
- **Coaching & Management Considerations**: Provides suggestions for using the information in the Management 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.

Executive Competency Overview

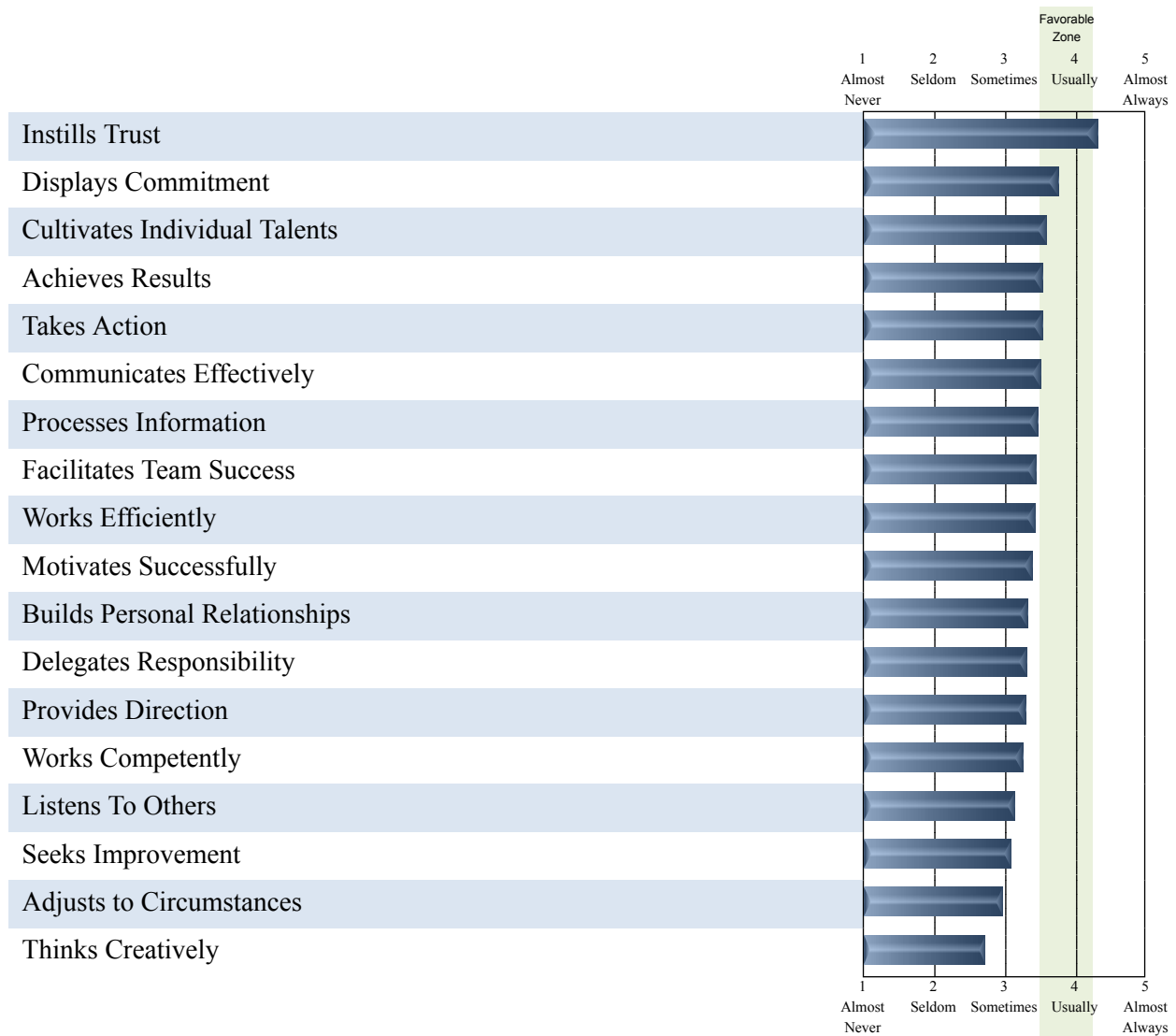


This is an overview of **Self's** rating compared to the average rating of **All Observers** (every rater except **Self**). As the **Self** (S) marker and the All (A) marker move away from the center of the circle, the scores are higher. Note particularly where there is a gap of 1 point or greater. This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

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

Executive Skill Set Summary

The graph below shows the average ratings of **All Observers** (ratings from everybody except **Self**) for each Skill Set. The average ratings are displayed ranked from highest to lowest providing you an overview of the relative strengths Paul Donaldson shows in these Skill Sets. While we suggest the manager focus on the most critical Skill Sets shown in the next section of this report, it is useful for you to have an overview of the ratings the manager received on all Skill Sets. Also, refer to the Development Summary Overview for more information.



Critical Skills Alignment Summary

Both you and Paul Donaldson identified the 6 Skill Sets that you each thought were most critical for success in the manager's job. These Skill Sets are displayed below. Consider that the possible number of Skill Sets selected by both you and the manager can range from 6 to 6. 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.

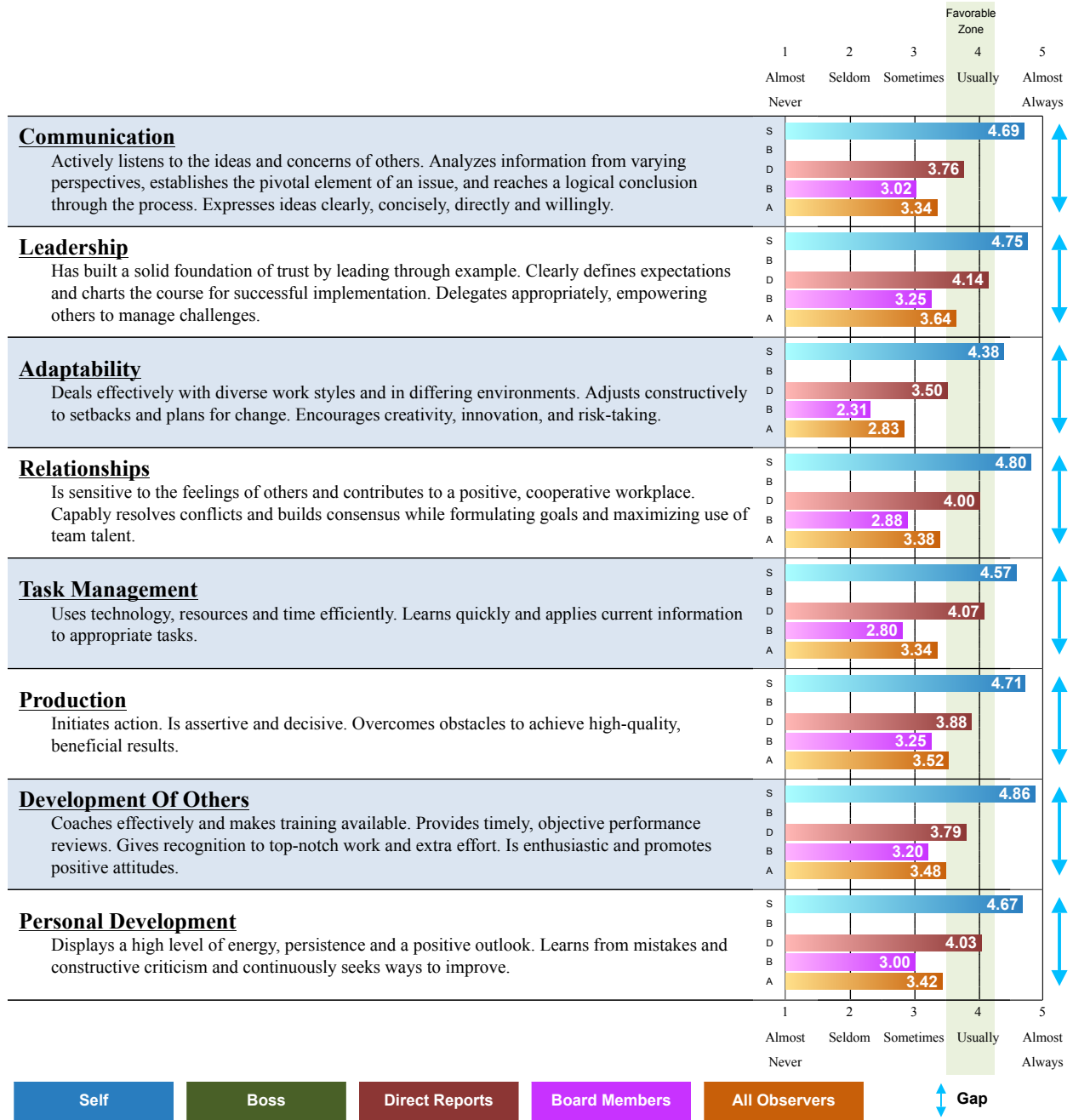
Critical Skills Alignment: 0%

- S** **Listens To Others:** Encourages others to share their ideas and concerns. Listens openly to all viewpoints without interrupting. Summarizes information and verifies understanding.
- S** **Communicates Effectively:** Expresses self clearly, both in writing and in speaking. Is thorough, yet concise, and is consistently straightforward. Readily shares information with others.
- S** **Instills Trust:** Can be trusted to keep promises and confidences. Is honest and ethical.
- 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.
- S** **Achieves Results:** Overcomes obstacles to achieve results that set high standards for others and that positively impact the organization.

S Self **B** Boss

Executive Summary

The average rating for each respondent group for the 8 Management Competencies is presented in this section. The numbers shown for **Self** (Paul Donaldson) and **Boss** (you) are the actual ratings. Note the differences between group ratings, especially where there is a gap indicated (a difference of 1 point or more between groups).



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**. They should be a subject of discussion between you and Paul Donaldson.

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.

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

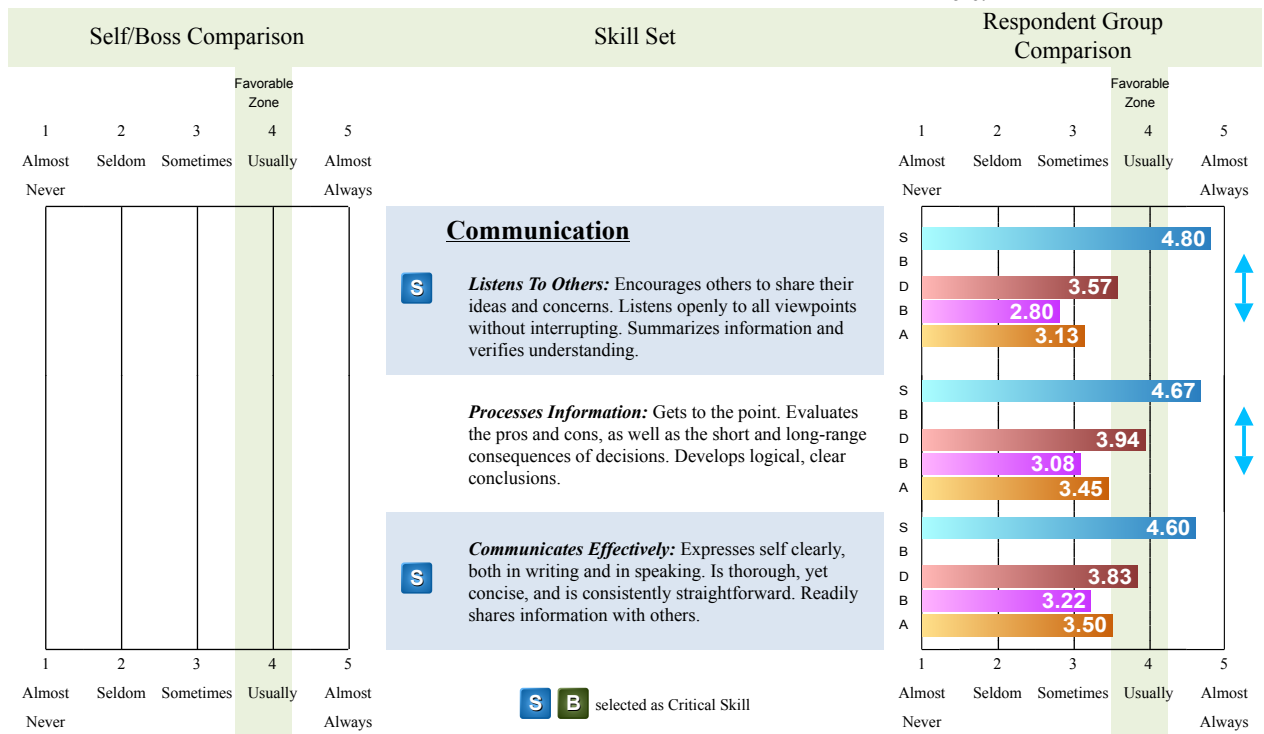
A Critical Skill Set, according to **Self** or **Boss**, and both **Self** and **Boss** score averages are equal to or higher than 3.5

Self Direct Reports
Boss Board Members
All Observers

S Ratings for Self
B

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

↕ 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. **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

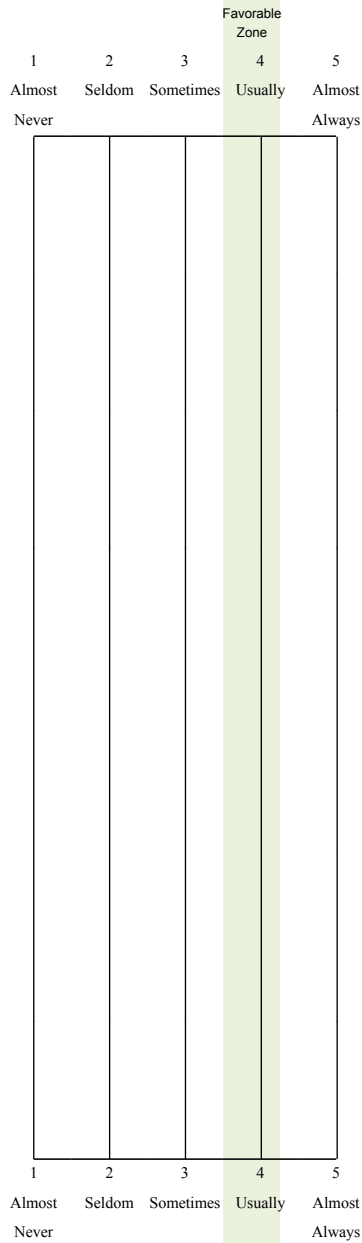
Self **Direct Reports**
Boss **Board Members**
All Observers

S Ratings for Self
B

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

↕ Any difference between respondent groups where averages vary by 1.5 points or more.

Self/Boss Comparison Skill Set Respondent Group Comparison



S **Leadership**

Instills Trust: Can be trusted to keep promises and confidences. Is honest and ethical.

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 **Adaptability**

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

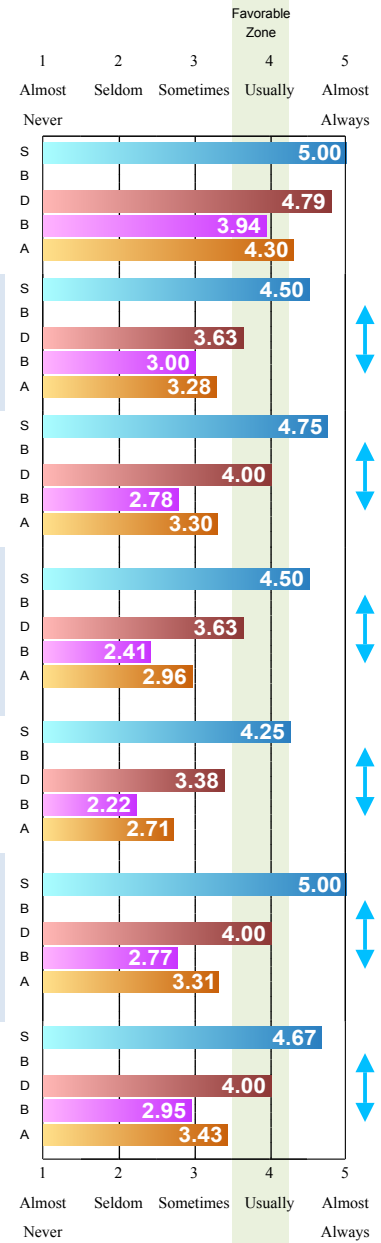
Thinks Creatively: Brings an imaginative approach to the job, inspiring innovation, risk-taking, and creative problem-solving.

Relationships

Builds Personal Relationships: Is considerate of others' feelings, shows freedom from unfair biases and is tactful when giving criticism. Remains composed under stress.

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.

S B selected as Critical Skill



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

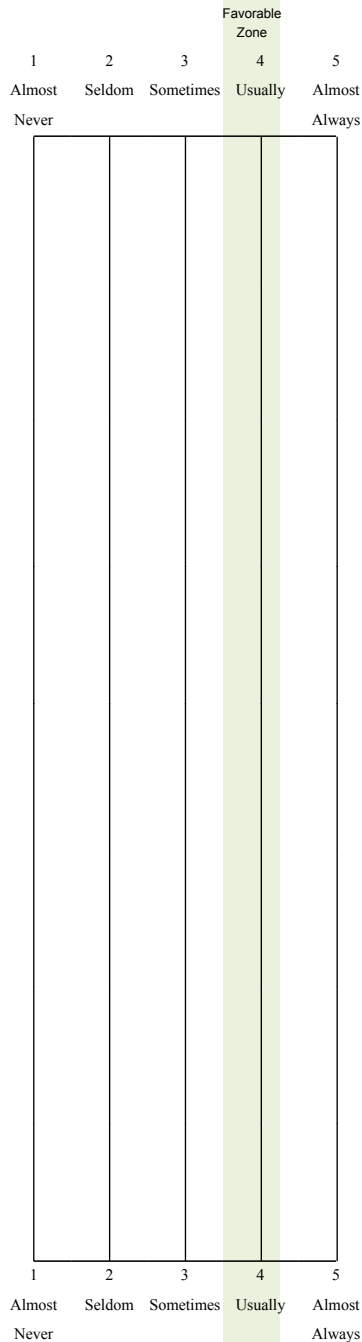
Self **Direct Reports**
Boss **Board Members**
All Observers

S Ratings for Self
B

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

↕ Any difference between respondent groups where averages vary by 1.5 points or more.

Self/Boss Comparison Skill Set Respondent Group Comparison



Task Management

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.

Production

Takes Action: Knows when the time is right to initiate action. Handles problems with assertiveness and makes timely, firm decisions.

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

Development Of Others

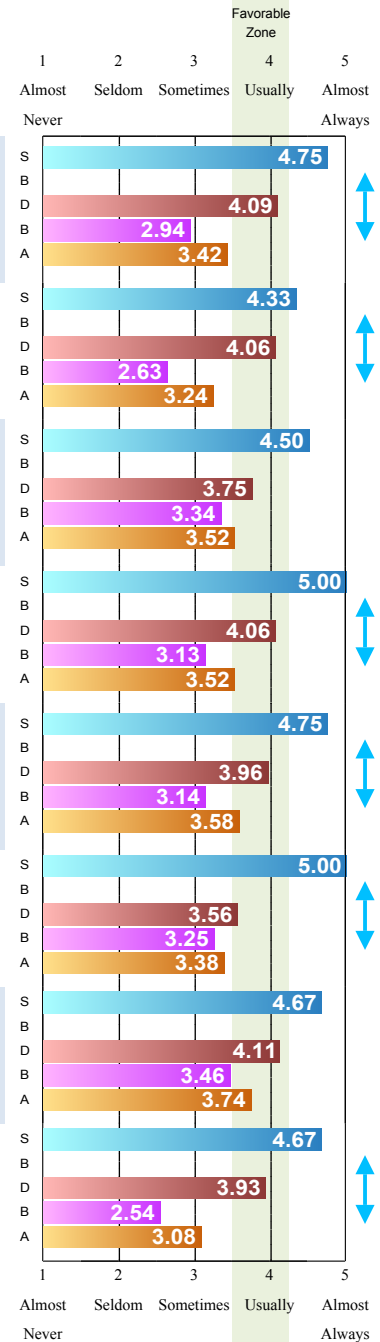
Cultivates Individual Talents: Is an effective coach and makes training available. Provides objective performance feedback on a timely basis.

Motivates Successfully: Gives recognition to people who produce excellent work and give extra effort. Has an enthusiastic attitude that positively affects others.

Personal Development

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

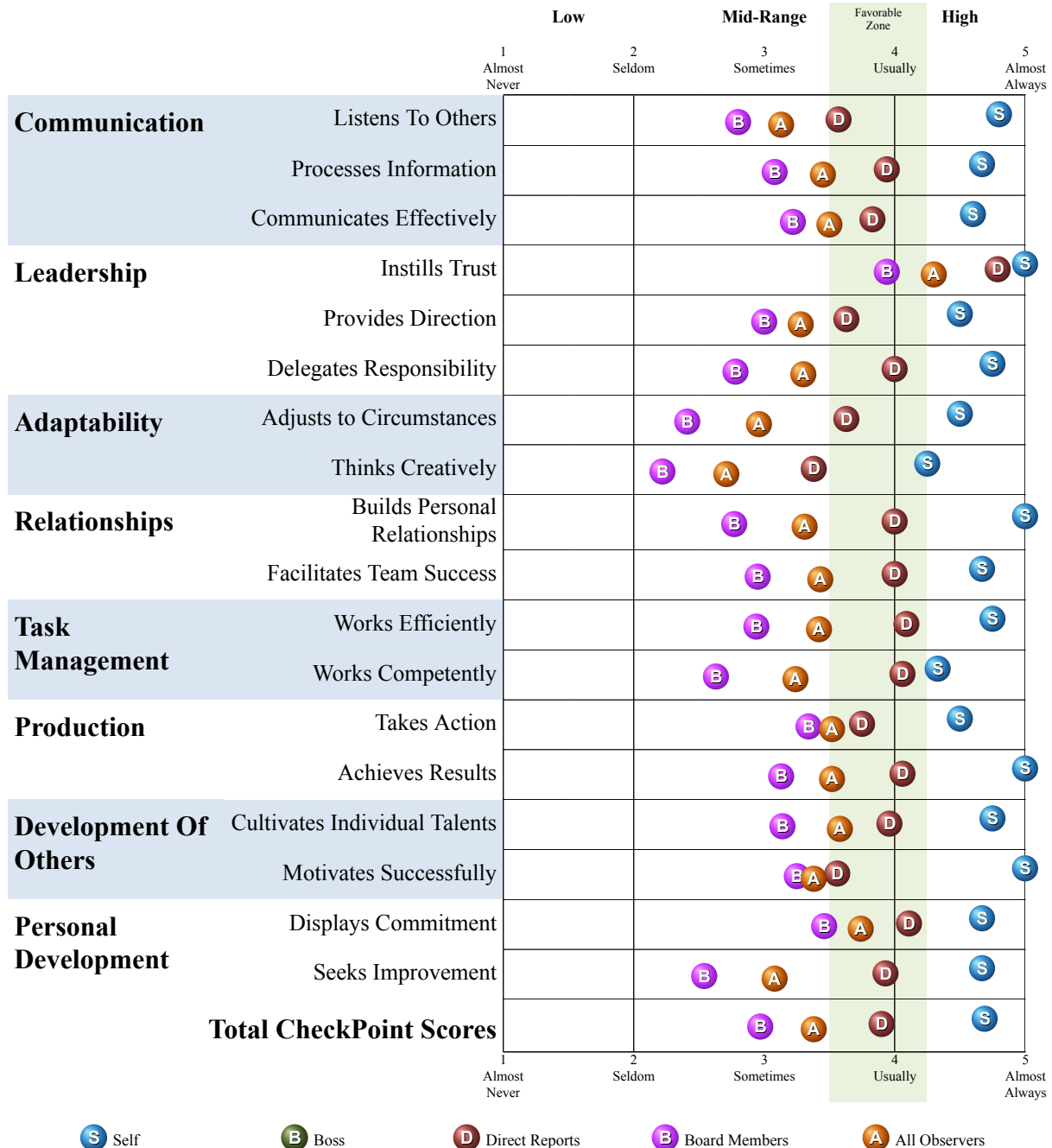
Seeks Improvement: Learns positive lessons from mistakes and constructive criticism. Pursues resources to improve and develop professionally. Sets no limits on personal potential.



S **B** selected as Critical Skill

Respondent Group Comparison

This page presents the relative placement of the average Skill Set score for each of the respondent groups. Each Skill Set is shown with its appropriate Universal Management Competency.




Survey Summary of the 70 items

The ratings for each individual question are shown for easy analysis. Should there be a variance of 3 or more points between groups on a question a flag will appear. Pay close attention to these questions because this wide variance may have had an impact on the average **All Observers** score for that Skill Set.

 **Boss and/or Self did not rate item**

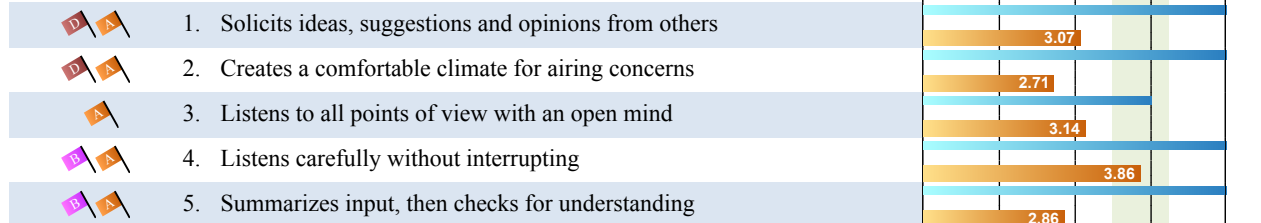
S B
Bold Lettering: Items that fall in a Critical Skill Set, as designated by Self and/or Boss


Flags: Responses lack consensus within respondent group (responses vary by 3 or more points).

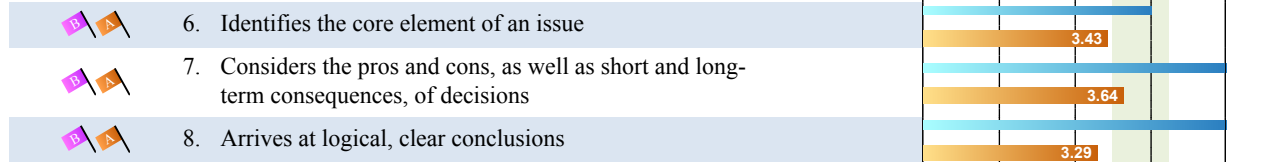
Self **All Observers**
Boss

Communication

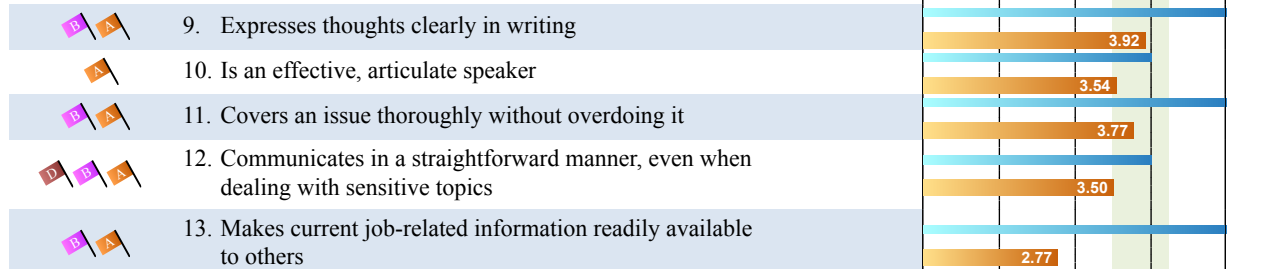
S *Listens To Others*



Processes Information



S *Communicates Effectively*



Leadership

S *Instills Trust*

