



ASSESSMENT OF LEADERSHIP POTENTIAL

Individual Report

Personal and Confidential

NAME

Jamie Sample

CLIENT

Lisa's Pilot Company

TARGET

Senior/Top Functional Executive

DATE










17 February 2015





Overview

This report summarizes the results of the assessment you completed in August 2014. It compares your responses to those of thousands of successful leaders in order to provide insight into your potential to succeed at higher levels of leadership.

Your assessment results are summarized below. You will find additional details about each area later in this report. If you have no significant change to your job role or employment status, these results will remain valid for approximately 24 to 36 months.

 Needs development	 Strong
	 Drivers
 Experience	
	 Awareness
	 Learning Agility
 Leadership Traits	
	 Capacity
	 Derailment Risks

-  Indicates an area of strength that will enhance your career development.
-  Indicates an area of relative weakness that would benefit from attention or development.

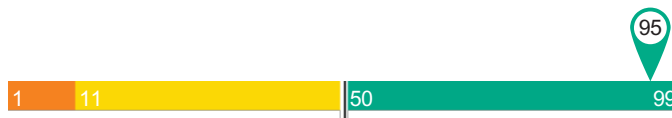
Assessment details

✓ Drivers

Successful leaders are motivated to lead others, are focused on their career, and prefer the work of leadership over specialization. They have specific career ambitions, well-defined preferences, and detailed plans for reaching goals. They enjoy work that requires personal accountability for outcomes that are largely out of their direct control. Your results suggest that you have the drive and ambition needed to progress to a senior/top functional executive and that you are likely to find the role engaging. At the same time, your career plan and work preferences seem more opportunistic than focused. Creating a more deliberate career plan will enhance your chances of continued success.

Advancement drive

Less ambitious. Currently concentrating on similar roles or continuing to grow in present role.

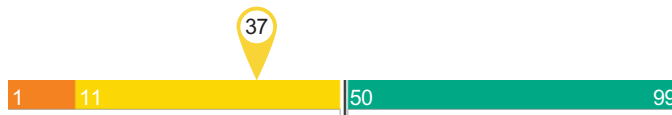


More ambitious. Shows desire to move into higher-level roles and further career development.

While your drive and ambition are clearly reflected in your career aspiration to be a top business or organizational group executive, your more immediate goal of advancing two or more levels in the next three to five years appears overly ambitious (especially considering that you have been in your current role for less than three years). The typical pace of advancement for leaders is one level every three to five years. Be careful that your drive to advance does not push you to take on too much too soon and, in doing so, harm your chances of attaining your career aspiration.

Career planning

Few strong preferences about career direction. More opportunistic rather than systematic in approach to career.



Strong career preferences aided by a specific plan to achieve goals.

Your results suggest you are somewhat less focused about your career than is typical for senior/top functional executives. Your results suggest you have some preferences about the types of organizations, industries, roles, etc., you would consider but that you have only a general career plan. You would benefit from narrowing your preferences and then refining your career plan to focus on attaining your career goals.

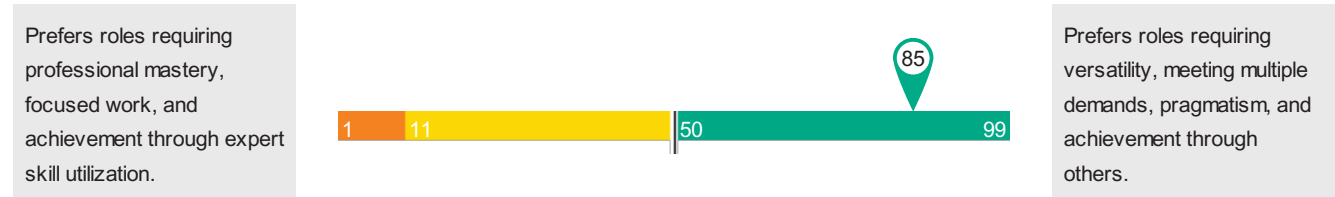
When it comes to your career, you have clear, strong preferences about:

- The size of organization you would prefer.
- The functional areas that interest you.

But you are relatively indifferent about:

- The type of role (line or staff) you want.
- The type of organization (public, private, government, etc.) you would prefer.
- The industries that interest you.

Role preferences

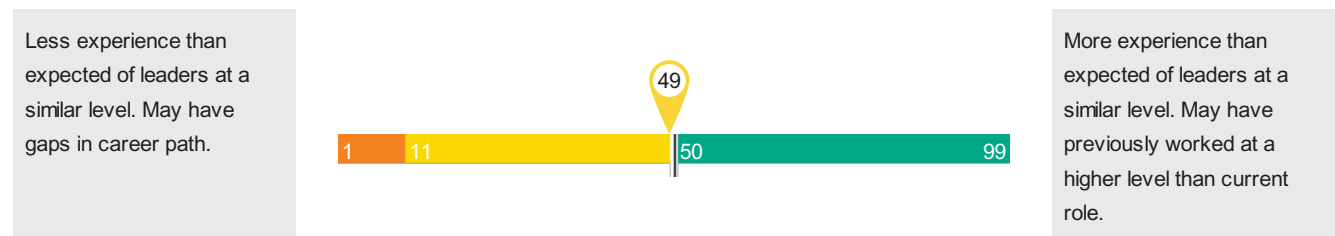


Your score is notably higher than most for senior/top functional executive roles. Most of the role preferences you chose are associated with leadership roles: practical solutions to problems and getting things done through others. This suggests you will enjoy and be engaged by the work of higher-level leadership.

 **Experience**

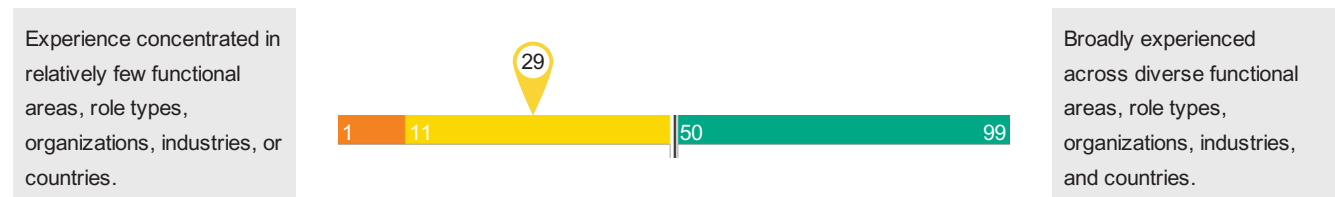
Successful leaders can gain three types of experience. Core experience is acquired during the routine, day-to-day work of being a leader. Perspective is gained by leading across a variety of settings. Finally, some leaders gain specific experience when they confront key leadership challenges (e.g., dealing with a crisis). Your results suggest that you have less core experience than most business or organizational unit/division leaders, that you have less perspective than most at this level, and that you have less experience with key leadership challenges than your peers.

Core experience



Your core experience is somewhat less than typical of other business or organizational unit/division leaders, but the pace of your career progress (four year(s) per leadership level) is on par with that of most leaders.

Perspective



Gaining perspective through experience—and thus understanding the different ways to approach problems—is an important part of succeeding as a leader. Your results suggest that you have perspective that is somewhat less than typical for business or organizational unit/division leaders. You would likely benefit from gaining more perspective. The easiest ways to gain perspective are to take on different leadership roles (staff vs. line), to work in different functional areas, or to live and work in other countries.

Key challenges



In the course of your career, you have faced more key challenges but report having gained somewhat less experience than is typical for business or organizational unit/division leaders. This suggests you may have been less directly involved. Be aware of opportunities where you can play a more significant role when confronting key challenges in the future. Items with a checkmark indicate key challenges where you already have had some experience. Items with an open box indicate key challenges where you do not yet have any experience.

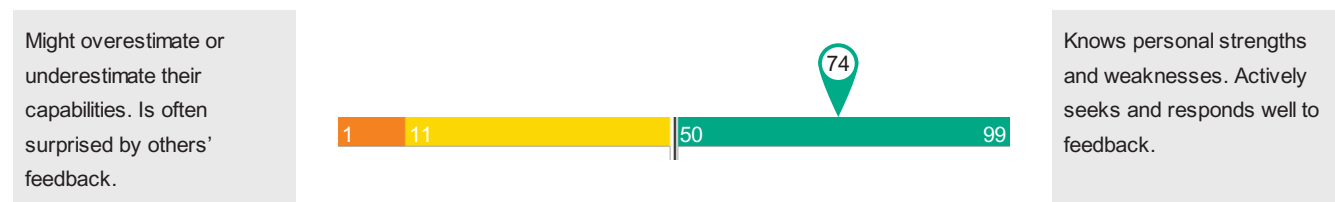
Key Leadership Challenges (areas where you indicated some experience are checked)

- Launching a new service or product.
- Starting up a new organization, business, line of business, or location.
- Merging with or acquiring another organization or business.
- Closing down or divesting an organization, business, line of business, or location.
- Working as an expatriate.
- Turning around an underperforming organization, business, line of business, or location.
- Dealing with a sudden, unexpected crisis.
- Negotiating a large-scale, critical deal, contract, or labor agreement.
- Dealing with a significant, large-scale change initiative.
- Dealing with an inherited problem or challenge.

  **Awareness**

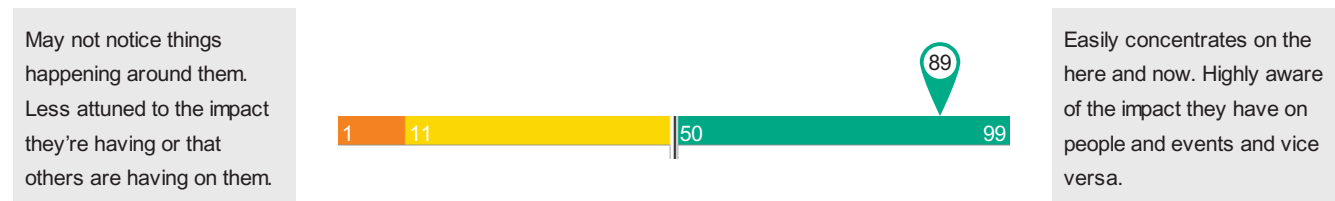
Successful leaders are aware of their strengths and weaknesses, allowing them to leverage their skills and focus on improving in areas that will yield the greatest returns. They are aware of their impact on other people, as well as what influences their own behavior. They adapt quickly to shifting situations. Your awareness of your personal strengths and development needs is typical for leaders at your career stage, which means you are more likely to perceive the impact you have on others or how situations or people affect you.

Self-awareness



Your results indicate that, compared to successful senior/top functional executives, your self-awareness is well above average. Your insights and understanding about your strengths and development needs contribute to your success as a leader and should continue to do so throughout your career.

Situational self-awareness

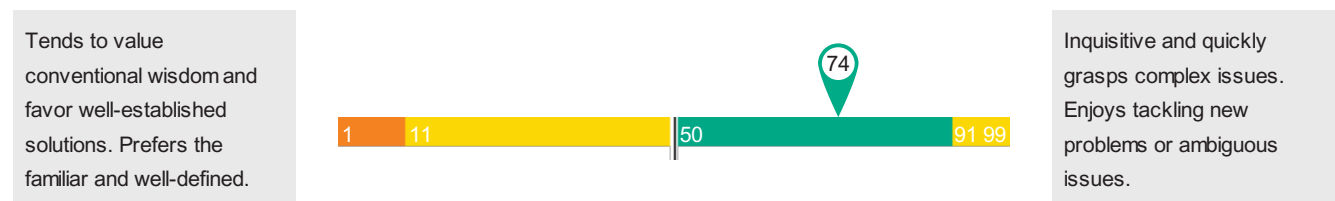


Your results indicate that, compared to successful senior/top functional executives, your situational self-awareness is well above average. Your insights and understanding about your impact on others and their impact on you contribute to your effectiveness.

  **Learning agility**

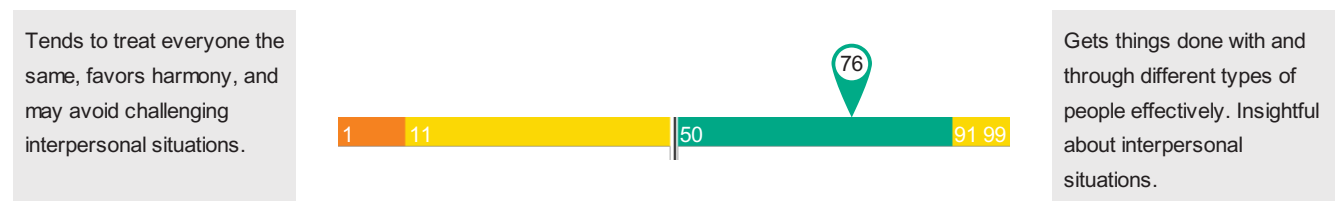
Successful leaders are agile learners. They learn from experience by extracting the meaning and principles from their experiences and leveraging those lessons when facing a new or novel situation. The more learning agile you are, the better your chances for success as a senior/top functional executive. Your results suggest you are agile in three of the four learning agility factors measured. More information on each aspect of learning agility is provided below, as are tips for mitigating the risks associated with too much or too little of each factor.

Mental agility



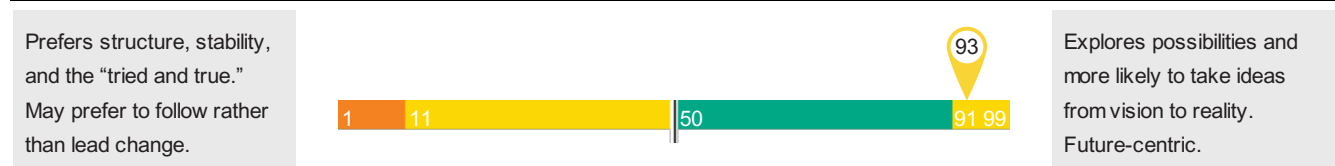
Having broad curiosity about the complex issues, challenges, and novel situations leaders face daily sets the stage for effective problem solving. Your results indicate that, compared to successful senior/top functional executives, your mental agility is well above average. Your results indicate a curiosity about issues and problems that helps you spot patterns, trends, and relationships. Leverage your skills by helping others see the patterns and inter-connections that you see.

People agility



Effective leaders understand the value of getting work done with and through people and are attuned to individuals' needs and motivations. Your results indicate that, compared to successful senior/top functional executives, your people agility is well above average. You are likely to be quite attuned to the needs, motives, and feelings of others and to modify and adapt your influence strategies to the specific situation. Continue to leverage these skills and to help others enhance their people agility.

Change agility

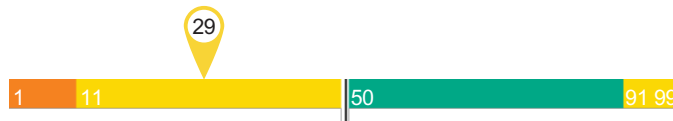


Your results put you in the top 10% of senior/top functional executives in terms of your willingness to embrace change and take well-reasoned risks. Change is necessary and unavoidable, and being adaptable and willing to take risks are valuable attributes in leaders. At the same time, your change agility approaches a level where you embrace change simply for the sake of change or take risks where the downsides outweigh the benefits. Keep in mind that not everyone is as open to change as you are and be careful you don't push people too far outside of their comfort zones.

Jamie Sample

Results agility

Prefers attainable, well understood goals. Makes steady effort to deliver on time and within in budget.



Energized by new, tough assignments and overcomes obstacles to achieve stretch work objectives.

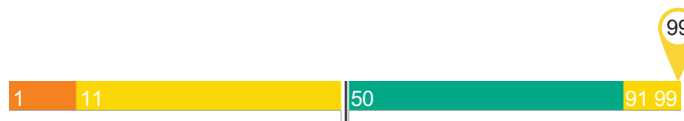
Every leader must deliver expected results, and those who do so reliably are far more likely to be successful. Your results fall in a region somewhat lower than average and suggest that you would benefit from continuing to develop your results agility. Build on your existing strengths. Every time you succeed, set the bar just a bit higher and push yourself and your team to meet or even exceed expectations. Don't rely on existing processes to see you through. Anticipate how circumstances might change and develop contingency plans so your ability to deliver is not interrupted.

Leadership traits

Traits reflect our underlying tendencies, styles, or preferences. They predispose us to behave in certain ways. The more you are naturally inclined to behave like a leader, the better your chances for success. Your results suggest you are naturally inclined toward effective leadership behaviors on three of five of the measured traits. Additional information about each trait and ideas about how to develop them are provided below.

Focus

Prefers order and structure. Concentrates on details and might get caught up in them. May have perfectionist tendencies.

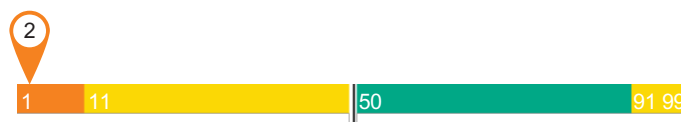


Has eye on the "big picture." Less concerned with small details. More error prone and tolerant of errors.

Successful leaders must strike the right balance between tracking important details and keeping their eye on the big picture. The further you progress in your leadership career, the more important it is to keep sight of the big picture, even if that means letting some details go. Your results put you in the top 10% of senior/top functional executives in terms of limiting your focus to just the bigger picture. While attending to the details does become less important the further you progress in your leadership career, it doesn't mean you can ignore details with impunity. Your results suggest you may too readily ignore or dismiss details—especially on tasks you find uninteresting or view as less important. Make sure that your preference for the big picture does not result in error-prone, disorganized, or sloppy work.

Persistence

May have changing long-term goals, pull back from obstacles, or lower expectations for long-term goal attainment.

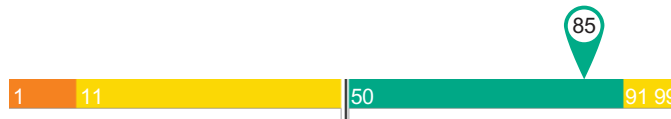


Passionate and steadfast about valued, very long-term, or lifetime goals, in spite of obstacles, discouragement, or distraction.

Successful leaders have closely held and personal long-term goals which help them focus and sustain them through difficulties and detours. Your results show that you are far less persistent in the pursuit of these goals than is typical for successful senior/top functional executives, indicating an urgent need for development in this area. You may find that you lack long-term and closely held goals, or that if you have such goals, they frequently change. You can't be a successful leader without a considerable amount of dedication to the long-term goals that sustain you. Consider carefully what is really important to you and try to adopt long-term goals that you value. If these goals are incompatible with advancement as a leader, consider how to adjust your professional goals to align with your closely held personal goals.

Tolerance of ambiguity

More likely to be disoriented or even immobilized by uncertainty or ambiguity in information or situations.



Comfortable with uncertain, vague, or contradictory information. Open to alternate solutions.

It is a volatile, uncertain, complex, and ambiguous (VUCA) world, and leaders need to navigate these conditions to succeed. Your results suggest that you are considerably more comfortable with ambiguity than is typical for successful senior/top functional executives. Leverage your skill by helping others learn to be comfortable in these situations as well.

Assertiveness

May feel tentative, passive, or indecisive, and may be more comfortable following the lead of others.



Expects to take charge, comfortable directing others and making decisions.

Successful leaders are comfortable taking charge and accepting leadership responsibilities. Your results fall in the somewhat below average range for successful senior/top functional executives. Leaders with relatively low assertiveness are at increased risk of appearing indecisive and may leave the team feeling a lack of direction. You would benefit from continuing to develop your assertiveness. Reflect on the specific things about asserting leadership that cause you to be uncomfortable. Is it advocating for a position, making final decisions, working with a particular person? This may reveal an underlying pattern to the things that trigger your discomfort with asserting leadership. Are there ways to overcome them? Consider exercising your assertiveness in small groups of people you are comfortable with or in particular areas where you have specific expertise.

Optimism

Has a more negative outlook. Tends to take setbacks personally. May appear dubious about work or things generally.



Generally upbeat about events and the future. Gets past disappointments. Looks forward to things.

Leadership involves accomplishments, but also inevitable setbacks. A positive, optimistic outlook will make a significant contribution to your success. Your results indicate that you are considerably more optimistic than is typical for successful senior/top functional executives. Leverage this advantage by helping others see the positive and the possible rather than focusing too much on the drawbacks, issues, and challenges.

  **Capacity**

Successful leaders are skilled at spotting patterns even in ambiguous, contradictory, or otherwise “noisy” environments. This facility provides extra time to deal with challenges or to take advantage of emerging trends.

Problem solving



Successful leaders are quick studies who can detect trends even in complex data or ambiguous situations. They make accurate projections and capitalize on their insights. Your results put you in the top 10% of senior/top functional executives in terms of problem-solving skills. Strong problem-solving skills are a valuable asset. But don't assume that things that come easily to you are apparent to others. Take time to explain your approach and help your team make the connections you do. Delegate problems (or parts of problems) so they can hone their own skills. This will help you build on your strengths while ensuring that your team does not come to overrely on your problem-solving skills. Strong problem-solving skills are a hallmark of successful leaders and will serve you well as you continue to progress in your career. But they also can create challenges. Trend lines that are apparent to you may not be visible to others. Solutions you see as straightforward may appear much more complex to others. Your skill is at a level that others may find intimidating. Be careful not to appear dismissive or condescending. Even casual statements such as, “I don't see what the big deal is, the pattern is obvious” can be misinterpreted. Make the effort to clearly explain your thought process and help others see what you see. That will build their skills, reduce any downside in perception of you, and increase the bench strength of your team.

  **Derailment risks**

Success in leadership is not just about what you do. Sometimes it's about what you resist doing. Certain behaviors reduce your effectiveness and can even derail your career. Three of the most common risk factors for derailment are: 1) behaving in a volatile or unpredictable manner; 2) being overly controlling or micromanaging; and 3) being closed to differences and relatively unwilling to change or adapt. Your results suggest that you are not excessively prone to any of these three risks.

Volatile



A reputation for volatility is rarely good for a leader's career—especially if that reputation is deserved. Your results suggest a lower than average risk of volatile or unpredictable behavior than is typical for successful senior/top functional executives. Your lower risk reflects a combination of composure and self-awareness about how situations and events affect you. Being attuned to your environment or situation lets you see triggers coming, making it less likely they will surprise you or evoke a strong reaction. Your relatively composed nature effectively buffers you from reacting inappropriately to situations or events.

Micromanaging

Delegates appropriately: holds others accountable for results, but gives them leeway on approach.



May insist on how work is completed and monitor others too closely.

Few behaviors damage team morale and performance more than micromanagement. Your results suggest a lower risk of micromanaging than is typical for successful senior/top functional executives. Keep it up! Make sure your team is clear about what constitutes excellent performance, that they have autonomy to determine how they will tackle their assigned duties, and that they get frequent, concrete feedback. That will keep them engaged in their work and performing at their best.

Closed

Interested in different ideas, others' opinions, and alternative ways of doing things. Likely to be flexible and adaptable.



Rigid preferences and opinions. Uninterested in exploring alternatives. Likely to be stubborn and unyielding.

Your results suggest a lower risk of being closed than is typical for successful senior/top functional executives. Keep it up! Continue to actively explore alternative perspectives or points of view and to vigorously debate their pros and cons. Combined with your natural tendencies to be flexible and to adapt relatively easily to change, this will contribute to your performance as a leader and enhance your chances for continued success.

Development priorities

Below are the three highest-priority development needs emerging from your assessment.

#1

Define where you want to go with your career and your life. Leaders who successfully advance along the leadership career path have closely held and highly valued long-term personal goals which help them focus and sustain them through difficulties and detours. Consider carefully what is really important to you and try to adopt long-term personal goals that you value. Take inventory and examine what is truly motivating to you as you consider your lifetime goals. Try to list them and define what is truly most important to you. Consider how your career plans contribute to achieving these long-term personal goals. Consider what has caused you to deviate from your long-term goals and think about how you might manage these detours most effectively. If your long-term or lifetime personal goals are incompatible with advancement as a leader, consider how to adjust your professional goals to align with your closely held personal goals.

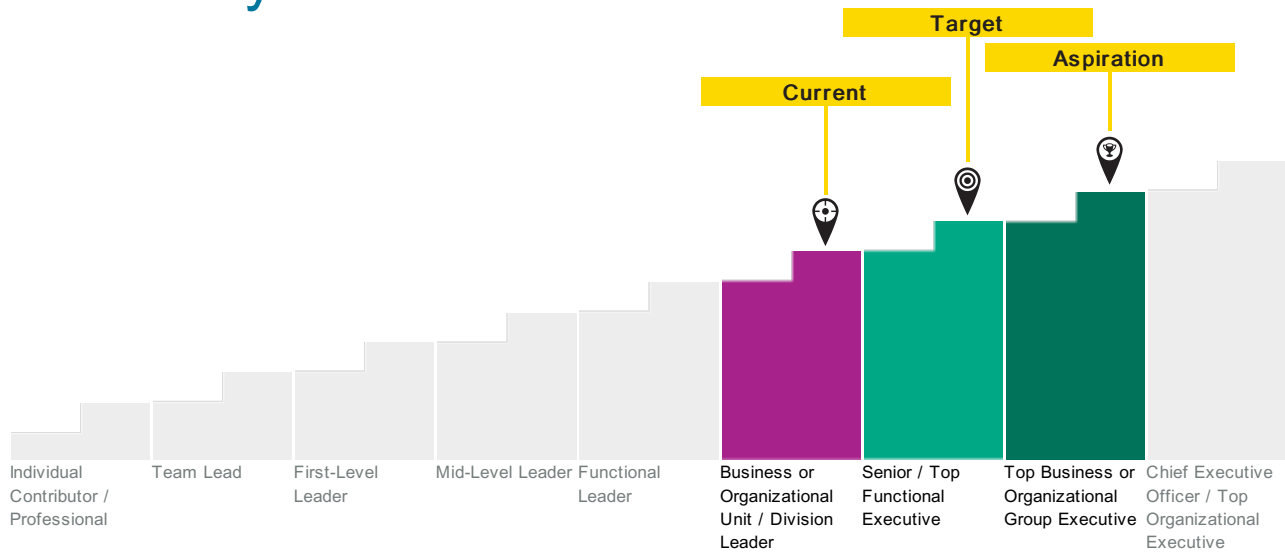
#2

Gain perspective in your work experience. In terms of experience, perspective means that you have had multiple vantage points on the same thing—for instance, understanding the staff and line role perspectives about budgeting or operating plans. Your results suggest you would benefit from widening your perspective. The easiest way is to gain experience in a different type of role (staff vs. line), functional area (e.g., sales vs. operations), or market (by working in a different country or culture).

#3

Push yourself and your team harder. You'll never know how much you or your team can accomplish if you've never hit your limits. Your results suggest you would benefit from setting more challenging goals. You don't want to overdo it or to set impossible goals. Challenging goals, clear expectations, good feedback, and personal accountability bring out the best in most people. Try setting the bar higher and prepare to be surprised by what people can accomplish.

Summary



Background

- 22 Years in the workforce
- 15 Years in management roles
- 3 Organizations
- 2 Tenure with current organization (in years)
- 2 Tenure in current role (in years)
- 0 Years of board experience
- 1 Country










Career Goals and Objectives

- Has a general plan about what he/she wants to accomplish
- 3 to 5 year goal is to progress to a higher level role
- Career aspiration is a role as a senior business group executive.



Ideal Role

- Challenges me intellectually
- Gives me a chance to experience new and different ideas and situations
- Involves working with quantitative or financial data/information
- Requires me to manage people
- Lets me coach others to help them develop their skills
- Lets me represent the organization to external stakeholders
- Requires me to drive organizational change

	2+ Years Experience	Would consider in the future:
		
Organization Type		
 Publicly Traded	✓	✓
Subsidiary of Publicly Traded		✓
Privately Held	✓	✓
Organization Size		
 Large (1,001 to 5,000 employees)	✓	✓
Very Large (more than 5,000 employees)	✓	✓
Industry		
Advanced Technology		✓
Financial Services		✓
Media & Entertainment		✓
 Professional & Business Services	✓	✓
Telecommunications		✓
Role Type		
 Line role	✓	✓
Staff role	✓	✓
Functional Area		
 Consulting	✓	✓
Executive & General Management		✓
Human Resources	✓	✓
Strategic Planning		✓

 (current role)



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