CheckPoint 360°™
Executive Overview

ABC Company

CONFIDENTIAL
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THIS REPORT INCLUDES RESPONSES FROM:
6 Managers, 8 Bosses, 23 Direct Reports, and 20 Peers

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**COMPANY
LOGO**

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 (the Manager), Bosses, Direct Reports, and Peers.

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

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

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

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

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

1. Communication
- Listens to Others
- Processes Information
- Communicates Effectively

2. Leadership
- Instills Trust
- Provides Direction
- Delegates Responsibility

3. Adaptability
- Adjusts to Circumstances
- Thinks Creatively

4. Relationships
- Builds Personal Relationships
- Facilitates Team Success

5. Task Management
- Works Efficiently
- Works Competently

6. Production
- Takes Action
- Achieves Results

7. Development of Others
- Cultivates Individual Talents
- Motivates Successfully

8. Personal Development
- Displays Commitment
- Seeks Improvement

Favorable Zone:

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

INTRODUCTION TO THE EXECUTIVE OVERVIEW

This report presents a summary view of the CheckPoint 360°™ recently completed by 6 Managers and their 8 Bosses in your organization. In addition, 23 Direct Reports, and 20 Peers participated in this survey. These results should be used to facilitate a manager's focus as they work with their boss to implement a unique plan for Leadership Development.
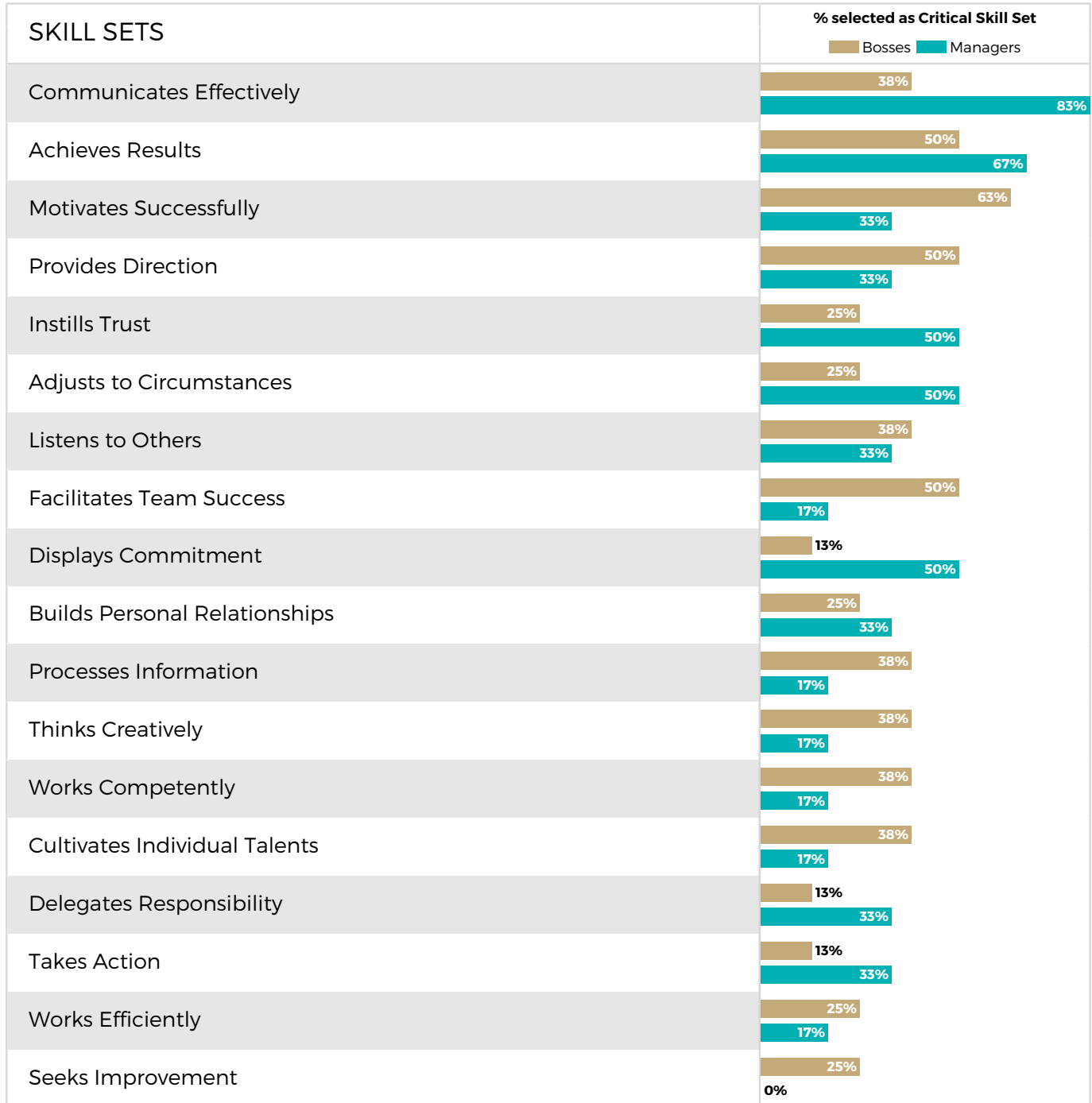
The collected ratings were analyzed to produce three useful indicators of the leadership strengths of your group:

1. **<u>Leadership Team Alignment</u>**: An important aspect of a business relationship is the degree of alignment between Managers and their respective Bosses regarding the skills critical for success. Both the Managers and their Bosses were presented with the 18 Skill Sets and asked to select the six Skill Sets they felt were most critical for success in the position. The extent that a Manager and a Boss agreed on which of the 18 Skill Sets are most critical to success is reflected in the Leadership Team Alignment percentage. An absolute agreement between a Manager and their Boss would be 100%. If they each selected six different Skill Sets the percent of alignment would be 0%. This alignment is an excellent indicator of the effectiveness of communication among your leaders. A high average percentage alignment here suggests a common view of the skills necessary to be a successful manager.

2. **<u>Organizational Competency Development Summary</u>**: This is an overall summary of how the Managers were rated by their Bosses, Direct Reports, and Peers on each of the 8 Management Competencies. The information is presented with the percentage of all ratings that fell below the Favorable Zone indicated in red and the percentage of all ratings that were in or above the Favorable Zone shown in green.

3. **<u>Organizational Skill Set Development Summary</u>**: Each Management Competency is made up of two or more of the 18 Skill Sets used to rate a Manager's actual behaviors. After each rater has indicated the frequency a Manager expresses these important behaviors in the actual work situation, an average rating is reported for each Skill Set. This provides a look at the percentage of your Managers who fall below the Favorable Zone on each Skill Set shown in red.

LEADERSHIP TEAM ALIGNMENT

The 6 Managers and their Bosses were presented with the 18 Skill Sets and each identified the 6 Skill Sets they considered to be most critical to success for the manager's job. The Overall Leadership Team Alignment represents the degree of alignment between each Manager and their respective Bosses averaged together to provide an overall rating. Shown to the right are the percentage of Managers and their Bosses selecting each Skill Set as a Critical Skill Set. These Skill Sets are presented in descending order based on the combined frequency of selection by both Managers and Bosses.

Overall Leadership Team Alignment – 31%

SKILL SETS	% selected as Critical Skill Set
	Bosses / Managers
Communicates Effectively	Bosses 38% / Managers 83%
Achieves Results	Bosses 50% / Managers 67%
Motivates Successfully	Bosses 63% / Managers 33%
Provides Direction	Bosses 50% / Managers 33%
Instills Trust	Bosses 25% / Managers 50%
Adjusts to Circumstances	Bosses 25% / Managers 50%
Listens to Others	Bosses 38% / Managers 33%
Facilitates Team Success	Bosses 50% / Managers 17%
Displays Commitment	Bosses 13% / Managers 50%
Builds Personal Relationships	Bosses 25% / Managers 33%
Processes Information	Bosses 38% / Managers 17%
Thinks Creatively	Bosses 38% / Managers 17%
Works Competently	Bosses 38% / Managers 17%
Cultivates Individual Talents	Bosses 38% / Managers 17%
Delegates Responsibility	Bosses 13% / Managers 33%
Takes Action	Bosses 13% / Managers 33%
Works Efficiently	Bosses 25% / Managers 17%
Seeks Improvement	Bosses 25% / Managers 0%

ORGANIZATIONAL COMPETENCY DEVELOPMENT SUMMARY

This table represents an overall average of how the Managers were rated by their Bosses, Direct Reports, and Peers on each of the 8 Universal Management Competencies. The information is presented with the percentage of all ratings that fell below the Favorable Zone indicated in red and the percentage of all ratings that were in or above the Favorable Zone shown in green.

UNIVERSAL MANAGEMENT COMPETENCIES

Favorable Zone

	Below	In and Above

Communication
Actively listens to the ideas and concerns of others. Analyzes information from varying perspectives, establishes the pivotal element of an issue, and reaches a logical conclusion through the process. Expresses ideas clearly, concisely, directly and willingly.

41% | 59%

Adaptability
Deals effectively with diverse work styles and in differing environments. Adjusts constructively to setbacks and plans for change. Encourages creativity, innovation, and risk-taking.

35% | 65%

Leadership
Has built a solid foundation of trust by leading through example. Clearly defines expectations and charts the course for successful implementation. Delegates appropriately, empowering others to manage challenges.

33% | 67%

Relationships
Is sensitive to the feelings of others and contributes to a positive, cooperative workplace. Capably resolves conflicts and builds consensus while formulating goals and maximizing use of team talent.

31% | 69%

Production
Initiates action. Is assertive and decisive. Overcomes obstacles to achieve high-quality, beneficial results.

31% | 69%

Task Management
Uses technology, resources and time efficiently. Learns quickly and applies current information to appropriate tasks.

27% | 73%

Development of Others
Coaches effectively and makes training available. Provides timely, objective performance reviews. Gives recognition to top-notch work and extra effort. Is enthusiastic and promotes positive attitudes.

27% | 73%

Personal Development
Displays a high level of energy, persistence and a positive outlook. Learns from mistakes and constructive criticism and continuously seeks ways to improve.

27% | 73%

ORGANIZATIONAL SKILL SET DEVELOPMENT SUMMARY

This table represents an overall average of how the Managers were rated by their Bosses, Direct Reports, and Peers on each of the 18 Skill Sets. The information is presented with the percentage of all ratings that fell below the Favorable Zone indicated in red and the percentage of all ratings that were in or above the Favorable Zone shown in green. These Skill Sets are presented in descending order based on the combined ratings below the Favorable Zone by both Managers and Bosses. Shown in the Critical Skill Ranking column is the ranking of each of the six Skill Sets that were rated as most critical for success by the Managers and the Bosses.

SKILL SETS (COMPETENCY)	Ranked Top Six Critical Skills	Favorable Zone — Below	In and Above
Listens to Others (Communication): Encourages others to share their ideas and concerns. Listens openly to all viewpoints without interrupting. Summarizes information and verifies understanding.		55%	45%
Processes Information (Communication): Gets to the point. Evaluates the pros and cons, as well as the short and long-range consequences, of decisions. Develops logical, clear conclusions.		37%	63%
Communicates Effectively (Communication): Expresses self clearly, both in writing and in speaking. Is thorough, yet concise, and is consistently straightforward. Readily shares information with others.	1	37%	63%
Thinks Creatively (Adaptability): Brings an imaginative approach to the job, inspiring innovation, risk-taking, and creative problem-solving.		35%	65%
Facilitates Team Success (Relationships): 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.		35%	65%
Delegates Responsibility (Leadership): Delegates appropriate jobs to appropriate people. Empowers others to work and solve problems on their own.		33%	67%
Provides Direction (Leadership): Establishes clear expectations and a manageable workload. Plans the steps required to accomplish objectives, while keeping focus on overall vision.	4	31%	69%
Adjusts to Circumstances (Adaptability): Can adjust to people's diverse work styles and to varying environments. Deals with setbacks constructively and anticipates change.	6	31%	69%
Motivates Successfully (Development of Others): Gives recognition to people who produce excellent work and give extra effort. Has an enthusiastic attitude that positively affects others.	3	31%	69%

SKILL SETS (COMPETENCY)	Ranked Top Six Critical Skills	Favorable Zone — Below / In and Above
Seeks Improvement *(Personal Development):* Learns positive lessons from mistakes and constructive criticism. Pursues resources to improve and develop professionally. Sets no limits on personal potential.		31% / 69%
Instills Trust *(Leadership):* Can be trusted to keep promises and confidences. Is honest and ethical.	5	29% / 71%
Builds Personal Relationships *(Relationships):* Is considerate of others' feelings, shows freedom from unfair biases and is tactful when giving criticism. Remains composed under stress.		29% / 71%
Works Competently *(Task Management):* Has mastered the fundamentals of the job. Can quickly and competently apply new methods and new information to appropriate tasks.		29% / 71%
Achieves Results *(Production):* Overcomes obstacles to achieve results that set high standards for others and that positively impact the organization.	2	29% / 71%
Takes Action *(Production):* Knows when the time is right to initiate action. Handles problems with assertiveness and makes timely, firm decisions.		27% / 73%
Cultivates Individual Talents *(Development of Others):* Is an effective coach and makes training available. Provides objective performance feedback on a timely basis.		27% / 73%
Works Efficiently *(Task Management):* Makes efficient use of current technology and wise use of outside resources. Avoids procrastination and sets priorities.		24% / 76%
Displays Commitment *(Personal Development):* Maintains a high level of energy, perseveres and remains positive.		24% / 76%

RAISING YOUR MANAGERS' LEADERSHIP CAPABILITIES

Developing a Plan

The challenge for all organizations is creating a culture that will foster a level of commitment and accountability to the ongoing development of the individual Manager. The success of the CheckPoint 360°™ process is not in the execution of the surveys, but in the follow through in developing your Managers.

This Executive Overview Report contains a condensed view of the results from the CheckPoint 360°™. This information is useful to identifying current competencies at the management level of your organization.

The reports provided to each Manager and Boss goes into great detail in identifying each Manager's strengths and weaknesses. The key to enhancing the organization's leadership capabilities is ensuring that managers at all levels in the organization utilize the provided information to create an action plan for their ongoing development. While it is important that the Boss work with each Manager to improve their management skills, Managers should be held personally accountable for their own development through an individual plan supported by coaching and continuous feedback from their leadership.

As Managers benefit from this ongoing leadership development process and their effectiveness increases, the impact on the overall performance of the organization will become apparent. Progress will be demonstrated with subsequent CheckPoint 360°™ surveys which will also highlight those areas still needing attention.