



Organizational Management Analysis for:

ABC Company



# CheckPoint

## 360° Competency Feedback System

A confidential report prepared November 23, 2009, by:  
Profiles International, Inc.

ABC Company

Management Team

Organizational Management Analysis

*Includes 15 Participants \**

*24 Bosses, 81 Direct Reports and 64 Peers*

### **Introduction to your Organizational Management Analysis**

The Organizational Management Analysis (OMA) is designed to summarize the information from all of the CheckPoint 360 individual feedback reports generated on the group selected. The individual feedback reports identified the Managers strengths and areas needing improvement.

CheckPoint 360 is a professional development tool which measures skills that positively impact a Manager's growth. It measures a manager's competencies, which are verified from a variety of perspectives, and pinpoints ways to enhance skills. CheckPoint is an ongoing process that can be utilized at key intervals to monitor performance. It assesses professional development by measuring 70 factors in eight performance areas crucial to effective job performance.

The leadership skills of Managers are typically appraised by three different rating groups: their Boss(es), their Direct Reports, and their Peers. The OMA contains a summary of the information presented to those Managers. In addition, it provides an overview of the strengths and development areas of the Managers and direction for the necessary skills training needed to improve their performance.

The 8 Universal Management Competencies and supporting 18 Skill Sets studied were:

#### **Communication**

- Listens to Others
- Processes Information
- Communicates Effectively

#### **Leadership**

- Instills Trust
- Provides Direction
- Delegates Responsibility

#### **Adaptability**

- Adjusts to Circumstances
- Thinks Creatively

#### **Relationships**

- Builds Personal Relationships
- Facilitates Team Success

#### **Task Management**

- Works Efficiently
- Works Competently

#### **Production**

- Takes Action
- Achieves Results

#### **Development of Others**

- Cultivates Individual Talents
- Motivates Successfully

#### **Personal Development**

- Displays Commitment
- Seeks Improvement

\* A *Participant* is the individual identified as "Self" in each CheckPoint report. They were the focus for their particular CheckPoint 360. In this report they are referred to as Managers.

## Introduction to your Organizational Management Analysis (Cont.)

There are a number of benefits that can be gained from the OMA. From an executive perspective, the information contained in this report should be viewed in verifying alignment with corporate vision, mission, and strategic goals with regards to the development of your human capital.

**This Organizational Management Analysis is presented in three sections. Each is briefly described below.**

### **I. Executive Summary**

#### Critical Skill Set Summary

Identifies what the Manager and their Boss(es) considered the most critical Skill Sets for each Manager's job performance.

#### Critical Skill Set Alignment

Indicates where Boss(es) and Managers were in alignment with their Critical Skill Set selections.

#### Organizational Development Summary - All Raters

This graph shows what percentage of the raters (excluding Self) identified their Manager as being below, within, or above the Favorable Zone. \*

#### Organizational Development Summary - Direct Reports

This graph shows what percentage of the Direct Reports identified their Manager as being below, within, or above the Favorable Zone.

#### Skill Set Comparative Analysis

This section summarizes the information provided in each of the Manager's CheckPoint reports. This displays the percentage of the 18 Skill Sets rated below, within, or above the Favorable Zone.

### **II. Organizational Development Priorities**

This section identifies those Managers whose skills were rated as needing improvement.

### **III. Organizational Training Needs Analysis**

This section targets areas for training appropriate for each of the Managers.

\* The *Favorable Zone* represents a range where a group of effective managers and leaders were typically rated by others on the CheckPoint 360. These leaders were from a wide range of industries and organizations, and had all been identified as good performers by their respective companies.

# Section I - Executive Summary

## Critical Skill Set Summary

Color Key:  Bosses considering Skill Set as critical.  Managers considering Skill Set as critical.

The 15 Managers and their 24 Boss(es) were presented with the 18 Skill Sets and asked to identify the six that they considered to be the most critical for success. The chart below lists the Skill Sets in descending order and displays what percentage of the Managers and Bosses perceived that Skill Set to be critical.

Facilitates Team Success	36 of 39	92%	61%	31%
Communicates Effectively	32 of 39	82%	59%	23%
Achieves Results	29 of 39	74%	48%	26%
Motivates Successfully	28 of 39	72%	51%	21%
Delegates Responsibility	16 of 39	41%	36%	5%
Provides Direction	16 of 39	41%	23%	18%
Thinks Creatively	12 of 39	31%	13%	18%
Seeks Improvement	10 of 39	26%	21%	5%
Instills Trust	10 of 39	26%	3	23%
Works Competently	9 of 39	23%	18%	5%
Works Efficiently	8 of 39	21%	16%	5%
Displays Commitment	6 of 39	15%	10%	5%
Listens To Others	6 of 39	15%	15%	
Takes Action	5 of 39	13%	5%	8%
Cultivates Individual Talents	4 of 39	10%	2	8%
Builds Personal Relationships	3 of 39	8%	3	5%
Adjusts to Circumstances	3 of 39	8%	8%	
Processes Information	1 of 39	3%	3	

# Critical Skill Set Alignment

Color Key:  Percentage of Manager alignment with Boss 1.  
 Percentage of Manager alignment with Boss 2.

One of the most important, yet frequently ignored, aspects of a business relationship is the degree of alignment between Managers and their Bosses regarding the critical skills essential for success. From the critical Skill Sets selected by the Managers and their Boss(es), the following graph displays where the Boss(es) and the Managers were in alignment with their selections.

**The average critical skill alignment is 53%**

Managers	(*)	Critical Skills Alignment with Boss(es)	
Fitzgerald, Daisy	4 of 6	67%	
	5 of 6	83%	
Brando, Stella	4 of 6	67%	
	3 of 6	50%	
Break, Anita	3 of 6	50%	
	4 of 6	67%	
Report, Cindy	4 of 6	67%	
	4 of 6	67%	
Service, Darlene	3 of 6	50%	
	4 of 6	67%	
Example, Dan	3 of 6	50%	
Name, Alicia	3 of 6	50%	
	3 of 6	50%	
Sample, Sally	3 of 6	50%	
	3 of 6	50%	
Test, Michael	3 of 6	50%	
	3 of 6	50%	
Training, Jill	3 of 6	50%	
	3 of 6	50%	
Walker, Darcy	3 of 6	50%	
Salmon, Kilgore	2 of 6	33%	
Snell, Sue	2 of 6	33%	
	2 of 6	33%	
Trial, Cynthia	2 of 6	33%	
Manager, Waldo	Survey did not include a Boss response.		

(\*) Number of skills where the Manager was in alignment with their Boss.

# Organizational Development Summary - All Raters

Color Key: ■ Percentage of Raters below the Favorable Zone. ■ Percentage of Raters within the Favorable Zone. ■ Percentage of Raters above the Favorable Zone.

As accumulated from the CheckPoint reports, this report includes a total of 169 CheckPoint surveys completed by the various raters, Boss(es), Peers and Direct Reports. This graph shows the perceived management strengths and areas for development and compares this information to the critical skills required for success as chosen by your management team. All of these Organizational Development areas are explored in greater detail in a later section of this report.

You can see what percentage of raters identified their Managers as below, within, or above the Favorable Zone.

Skill Sets	(*)	Percentage of Raters		
Delegates Responsibility	5	29%	38%	33%
Seeks Improvement		29%	34%	37%
Listens To Others		28%	38%	34%
Thinks Creatively		27%	40%	33%
Cultivates Individual Talents		27%	39%	34%
Processes Information		26%	36%	38%
Facilitates Team Success	1	25%	31%	44%
Provides Direction	6	24%	40%	36%
Communicates Effectively	2	24%	40%	36%
Motivates Successfully	4	23%	30%	47%
Builds Personal Relationships		22%	38%	40%
Achieves Results	3	20%	29%	51%
Adjusts to Circumstances		19%	44%	37%
Takes Action		18%	39%	43%
Works Competently		17%	24%	59%
Instills Trust		15%	27%	58%
Works Efficiently		14%	46%	40%
Displays Commitment		10%	30%	60%

(\*) The number represents the top 6 Skill Sets that were identified to be the most critical as noted on page 3.

# Organizational Development Summary - Direct Reports

Color Key: ■ Percentage of Direct Reports below the Favorable Zone. ■ Percentage of Direct Reports within the Favorable Zone. ■ Percentage of Direct Reports above the Favorable Zone.

This section of the report includes only the 81 CheckPoint surveys completed by the Direct Reports. This graph shows the perceived management strengths and areas for development as seen by the direct reports of your Managers. This information is also compared to the critical skills required for success as chosen by your management team.

You can see what percentage of raters identified their Managers as below, within, or above the Favorable Zone.

Skill Sets	(*)	Percentage of Direct Reports		
Seeks Improvement		41%	28%	31%
Cultivates Individual Talents		37%	35%	28%
Facilitates Team Success	1	37%	26%	37%
Delegates Responsibility	5	37%	25%	38%
Provides Direction	6	35%	38%	27%
Thinks Creatively		35%	36%	29%
Communicates Effectively	2	35%	36%	29%
Processes Information		34%	31%	35%
Listens To Others		33%	36%	31%
Motivates Successfully	4	31%	30%	39%
Takes Action		28%	37%	35%
Adjusts to Circumstances		28%	35%	37%
Achieves Results	3	28%	25%	47%
Builds Personal Relationships		26%	41%	33%
Works Competently		25%	29%	46%
Works Efficiently		23%	41%	36%
Instills Trust		21%	31%	48%
Displays Commitment		15%	32%	53%

(\*) The number represents the top 6 Skill Sets that were identified to be the most critical as noted on page 3.

# Skill Set Comparative Analysis

Color Key: ■ Percentage of Skill Sets below the Favorable Zone. ■ Percentage of Skill Sets within the Favorable Zone. ■ Percentage of Skill Sets above the Favorable Zone.

This section summarizes the information provided in each of the Manager's CheckPoint reports. This displays the percentage of the 18 Skill Sets rated below, within or above the Favorable Zone for Managers by rater groups.

The obvious goal for any organization would be that each Manager would be rated within or above the Favorable Zone in all 18 Skill Sets by all raters. Unfortunately, this does not always occur. By reviewing the information below, you can compare the rater groups to each other with regard to the 18 Skill Sets.

The information below visually displays the rater group analysis by Manager. A further breakdown of this analysis is located in Section II, titled Organizational Development Priorities.

## Managers

## Percentage of the 18 Skill Sets

<b>Sample, Sally</b> 2 Bosses, 6 Direct Reports and 4 Peers	<b>A</b>	67%		33%			
	<b>B</b>	28%	61%			11%	
	<b>B2</b>	39%		50%		11%	
	<b>D</b>	100%					
	<b>P</b>	11%	56%		33%		
	<b>S</b>	67%		33%			
<b>Walker, Darcy</b> 1 Boss, 3 Direct Reports and 4 Peers	<b>A</b>	50%		33%		17%	
	<b>B</b>	50%		28%	22%		
	<b>D</b>	50%		33%		17%	
	<b>P</b>	39%		44%		17%	
	<b>S</b>	22%	61%			17%	
	<b>Test, Michael</b> 2 Bosses, 10 Direct Reports and 0 Peers	<b>A</b>	33%		67%		
<b>B</b>		39%			61%		
<b>B2</b>		50%		33%		17%	
<b>D</b>		50%		50%			
<b>P</b>							
<b>S</b>		22%		78%			
<b>Trial, Cynthia</b> 1 Boss, 4 Direct Reports and 7 Peers	<b>A</b>	28%		67%		5%	
	<b>B</b>	6%	94%				
	<b>D</b>	33%		67%			
	<b>P</b>	50%		44%		6%	
	<b>S</b>	33%		67%			
	<b>Report, Cindy</b> 2 Bosses, 7 Direct Reports and 3 Peers	<b>A</b>	28%		61%		11%
<b>B</b>		33%		50%		17%	
<b>B2</b>		17%	22%	61%			
<b>D</b>		50%		50%			
<b>P</b>		22%	50%		28%		
<b>S</b>		33%		67%			
<b>Service, Darlene</b> 2 Bosses, 3 Direct Reports and 6 Peers	<b>A</b>	6%	89%				5%
	<b>B</b>	94%					6%
	<b>B2</b>	6%	50%		44%		
	<b>D</b>	89%				11%	
	<b>P</b>	56%		44%			
	<b>S</b>	78%			22%		
<b>Break, Anita</b> 2 Bosses, 5 Direct Reports and 5 Peers	<b>A</b>	89%				11%	
	<b>B</b>	72%			28%		
	<b>B2</b>	28%	72%				
	<b>D</b>	33%		67%			
	<b>P</b>	28%	72%				
	<b>S</b>	22%	78%				

Color Key: **A** All Observers **B** Boss **B2** Boss 2 **D** Direct Reports **P** Peers **S** Self

# Skill Set Comparative Analysis, Cont.

Color Key: ■ Percentage of Skill Sets below the Favorable Zone.  
■ Percentage of Skill Sets within the Favorable Zone.  
■ Percentage of Skill Sets above the Favorable Zone.

## Managers

### Percentage of the 18 Skill Sets

<b>Training, Jill</b>  2 Bosses, 4 Direct Reports and 6 Peers	<b>A</b>	83%		17%	
	<b>B</b>	6%	78%		16%
	<b>B2</b>	50%		50%	
	<b>D</b>	11%	89%		
	<b>P</b>	61%		39%	
	<b>S</b>	22%	78%		

<b>Fitzgerald, Daisy</b>  2 Bosses, 3 Direct Reports and 4 Peers	<b>A</b>	72%		28%	
	<b>B</b>	78%			22%
	<b>B2</b>	6%	39%	55%	
	<b>D</b>	28%	72%		
	<b>P</b>	28%	61%		11%
	<b>S</b>	100%			

<b>Name, Alicia</b>  2 Bosses, 7 Direct Reports and 3 Peers	<b>A</b>	72%		28%		
	<b>B</b>	6%	89%			5%
	<b>B2</b>	17%	83%			
	<b>D</b>	72%		28%		
	<b>P</b>	28%	72%			
	<b>S</b>	50%	50%			

<b>Snell, Sue</b>  2 Bosses, 2 Direct Reports and 6 Peers	<b>A</b>	50%		50%		
	<b>B</b>	94%				6%
	<b>B2</b>	11%	61%		28%	
	<b>D</b>	44%		22%	34%	
	<b>P</b>	6%	94%			
	<b>S</b>	100%				

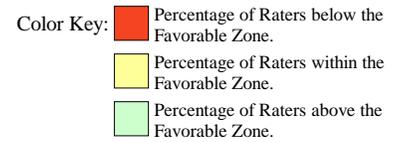
<b>Brando, Stella</b>  2 Bosses, 5 Direct Reports and 4 Peers	<b>A</b>	50%		50%			
	<b>B</b>	78%			22%		
	<b>B2</b>	17%	78%				5%
	<b>D</b>	44%		56%			
	<b>P</b>	33%		67%			
	<b>S</b>	11%	44%		45%		

<b>Manager, Waldo</b>  0 Boss, 12 Direct Reports and 0 Peers	<b>A</b>	33%		67%		
	<b>B</b>					
	<b>D</b>	33%		67%		
	<b>P</b>					
	<b>S</b>	11%	89%			

<b>Salmon, Kilgore</b>  1 Boss, 2 Direct Reports and 9 Peers	<b>A</b>	28%		72%		
	<b>B</b>	6%	22%	72%		
	<b>D</b>	6%	78%			16%
	<b>P</b>	17%	83%			
	<b>S</b>	6%	72%		22%	

<b>Example, Dan</b>  1 Boss, 8 Direct Reports and 3 Peers	<b>A</b>	22%		78%		
	<b>B</b>	11%	89%			
	<b>D</b>	6%	94%			
	<b>P</b>	6%	50%		44%	
	<b>S</b>	22%	78%			

## Section II - Organizational Development Priorities



This section of the report reviews all of the Managers and lists those Skill Sets for which improvement is recommended.

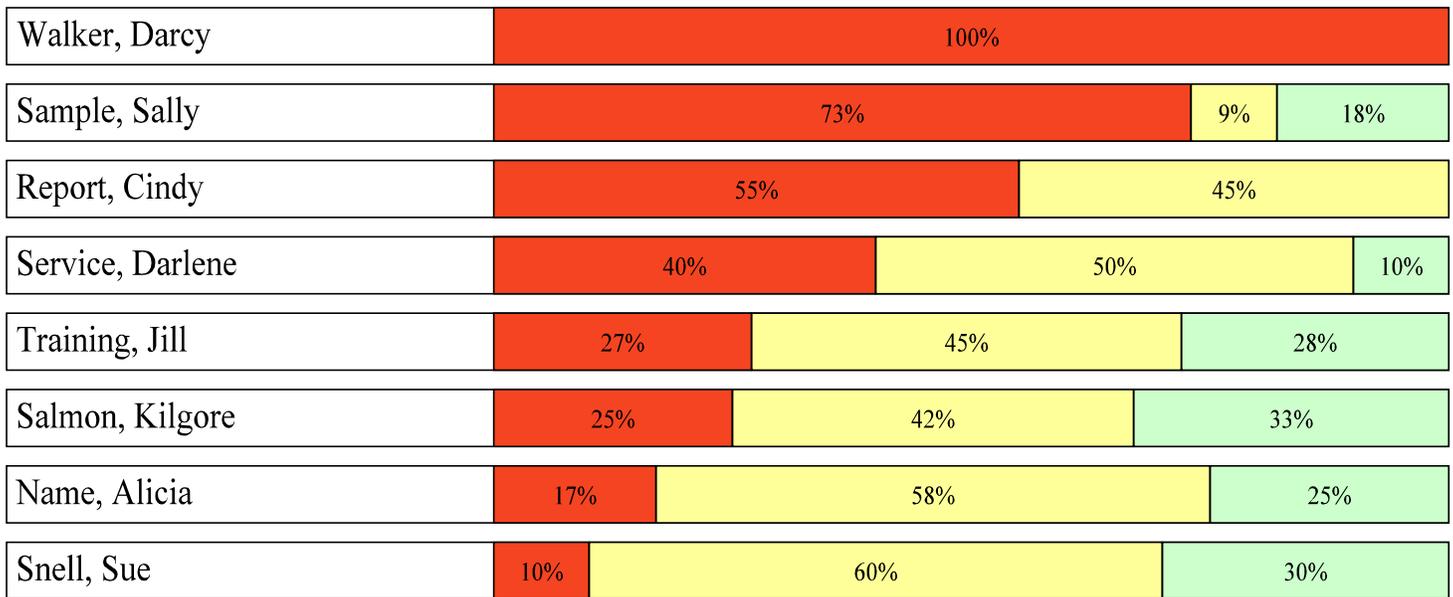
In the following pages each of the 18 Skill Sets is presented and ranked as indicated on the Organizational Development Summary area of this report.

The definition of the Skill Set is included.

### *Delegates Responsibility*

***Delegates Responsibility:*** Delegates appropriate jobs to appropriate people. Empowers others to work and solve problems on their own.

The following Managers were provided recommendations for improvement in the Skill Set 'Delegates Responsibility' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.



The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.



## Organizational Development Priorities, Cont.

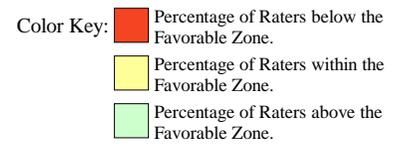
Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

Fitzgerald, Daisy	22%	44%	34%
Break, Anita	17%	50%	33%
Brando, Stella	9%	45%	46%

The following Manager scored above or within the Favorable Zone and was not provided recommendations for improvement in this Skill Set.

Example, Dan

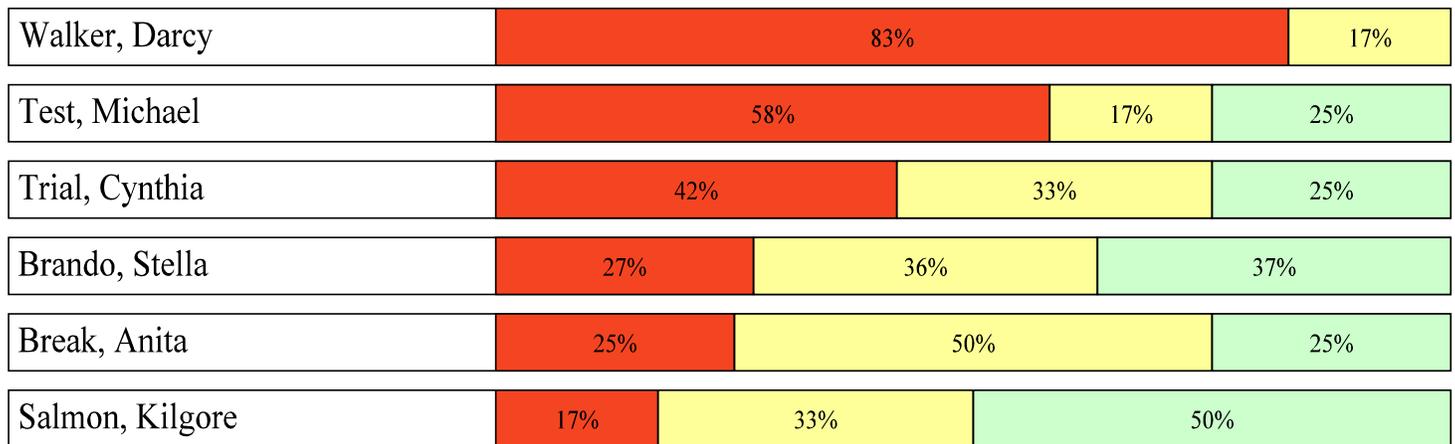
## Organizational Development Priorities, Cont.



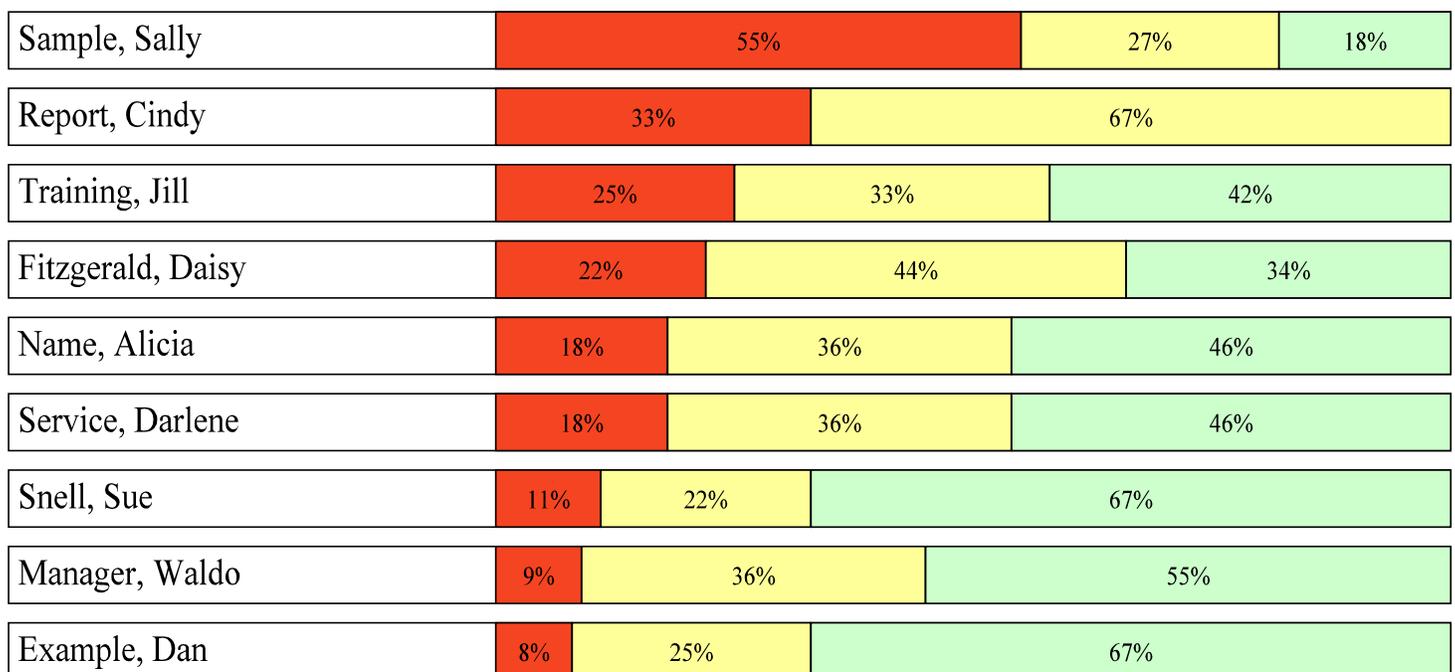
### *Seeks Improvement*

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

The following Managers were provided recommendations for improvement in the Skill Set 'Seeks Improvement' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.



The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.



## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Listens To Others*

**Listens To Others:** Encourages others to share their ideas and concerns. Listens openly to all viewpoints without interrupting. Summarizes information and verifies understanding.

The following Managers were provided recommendations for improvement in the Skill Set 'Listens To Others' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Report, Cindy	67%	33%	
Test, Michael	58%	33%	9%
Trial, Cynthia	42%	25%	33%
Fitzgerald, Daisy	33%	44%	23%
Training, Jill	33%	42%	25%
Manager, Waldo	17%	33%	50%
Salmon, Kilgore	8%	58%	34%
Example, Dan	8%	33%	59%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Sample, Sally	67%	25%	8%
Walker, Darcy	50%	25%	25%
Service, Darlene	18%	45%	37%
Brando, Stella	18%	27%	55%
Break, Anita	8%	58%	34%

## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Name, Alicia

Snell, Sue

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Thinks Creatively*

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

The following Managers were provided recommendations for improvement in the Skill Set 'Thinks Creatively' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Trial, Cynthia	50%	25%	25%
Service, Darlene	45%	45%	10%
Brando, Stella	45%	36%	19%
Test, Michael	42%	50%	8%
Snell, Sue	30%	40%	30%
Break, Anita	25%	42%	33%
Name, Alicia	18%	64%	18%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Walker, Darcy	80%	20%	
Sample, Sally	58%	33%	9%
Report, Cindy	25%	25%	50%
Fitzgerald, Daisy	13%	25%	62%
Manager, Waldo	8%	17%	75%

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Example, Dan  
Training, Jill

Salmon, Kilgore

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Cultivates Individual Talents*

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

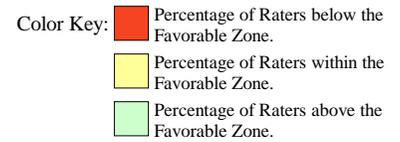
The following Managers were provided recommendations for improvement in the Skill Set 'Cultivates Individual Talents' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Training, Jill	20%	60%	20%
Salmon, Kilgore	8%	67%	25%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Walker, Darcy	100%		
Report, Cindy	55%	45%	
Sample, Sally	50%	40%	10%
Test, Michael	50%	33%	17%
Trial, Cynthia	40%	40%	20%
Service, Darlene	30%	40%	30%
Name, Alicia	18%	27%	55%
Manager, Waldo	17%	42%	41%
Snell, Sue	13%	50%	37%
Fitzgerald, Daisy	13%	38%	49%
Break, Anita	10%	40%	50%
Brando, Stella	9%	36%	55%
Example, Dan	9%	9%	82%

# Organizational Development Priorities, Cont.



## Processes Information

**Processes Information:** Gets to the point. Evaluates the pros and cons, as well as the short and long-range consequences, of decisions. Develops logical, clear conclusions.

The following Managers were provided recommendations for improvement in the Skill Set 'Processes Information' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Fitzgerald, Daisy	33%	33%	34%
Training, Jill	25%	58%	17%
Manager, Waldo	25%	25%	50%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Walker, Darcy	100%		
Test, Michael	42%	42%	16%
Sample, Sally	33%	33%	34%
Trial, Cynthia	33%	25%	42%
Report, Cindy	33%	17%	50%
Service, Darlene	27%	55%	18%
Break, Anita	25%	25%	50%
Name, Alicia	17%	50%	33%
Brando, Stella	9%	45%	46%
Salmon, Kilgore	8%	33%	59%
Example, Dan	8%	25%	67%

## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Manager scored above or within the Favorable Zone and was not provided recommendations for improvement in this Skill Set.

Snell, Sue

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Facilitates Team Success*

**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.

The following Managers were provided recommendations for improvement in the Skill Set 'Facilitates Team Success' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Walker, Darcy	83%	17%	
Sample, Sally	55%	36%	9%
Snell, Sue	22%	22%	56%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Report, Cindy	45%	18%	37%
Trial, Cynthia	36%	18%	46%
Test, Michael	33%	58%	9%
Service, Darlene	20%	50%	30%
Brando, Stella	18%	36%	46%
Break, Anita	18%	36%	46%
Name, Alicia	18%	27%	55%
Manager, Waldo	17%	17%	66%
Fitzgerald, Daisy	13%	25%	62%
Training, Jill	9%	55%	36%
Salmon, Kilgore	8%	33%	59%

## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Manager scored above or within the Favorable Zone and was not provided recommendations for improvement in this Skill Set.

Example, Dan

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Provides Direction*

***Provides Direction:*** Establishes clear expectations and a manageable workload. Plans the steps required to accomplish objectives, while keeping focus on overall vision.

The following Managers were provided recommendations for improvement in the Skill Set 'Provides Direction' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Walker, Darcy	83%	17%	
Fitzgerald, Daisy	25%	50%	25%
Manager, Waldo	17%	42%	41%
Name, Alicia	8%	75%	17%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Sample, Sally	58%	17%	25%
Test, Michael	42%	42%	16%
Report, Cindy	33%	25%	42%
Break, Anita	27%	27%	46%
Trial, Cynthia	25%	25%	50%
Service, Darlene	22%	56%	22%
Brando, Stella	18%	36%	46%
Training, Jill	17%	75%	8%
Snell, Sue	10%	50%	40%

## Organizational Development Priorities, Cont.

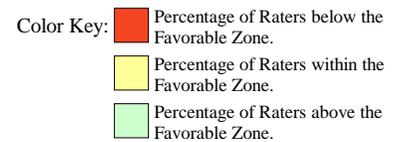
Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Example, Dan

Salmon, Kilgore

## Organizational Development Priorities, Cont.



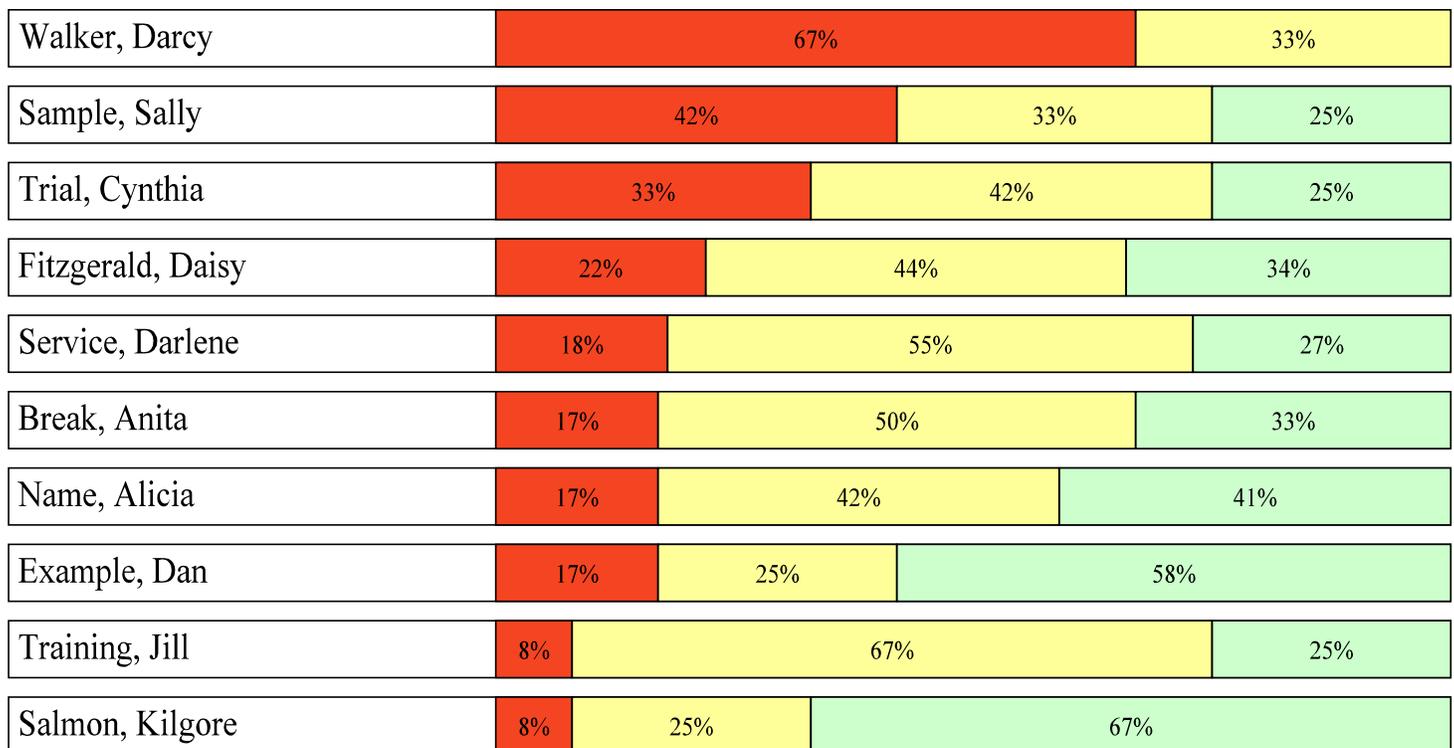
### *Communicates Effectively*

***Communicates Effectively***: Expresses self clearly, both in writing and in speaking. Is thorough, yet concise, and is consistently straightforward. Readily shares information with others.

The following Managers were provided recommendations for improvement in the Skill Set 'Communicates Effectively' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.



The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.



## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Brando, Stella

Snell, Sue

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Motivates Successfully*

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

The following Managers were provided recommendations for improvement in the Skill Set 'Motivates Successfully' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Sample, Sally	73%		27%
Example, Dan	25%	25%	50%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Walker, Darcy	100%		
Trial, Cynthia	50%	8%	42%
Test, Michael	33%	50%	17%
Report, Cindy	27%	27%	46%
Training, Jill	17%	42%	41%
Break, Anita	17%	25%	58%
Fitzgerald, Daisy	13%	25%	62%
Service, Darlene	9%	55%	36%
Name, Alicia	9%	18%	73%
Salmon, Kilgore	8%	33%	59%
Manager, Waldo	8%	25%	67%

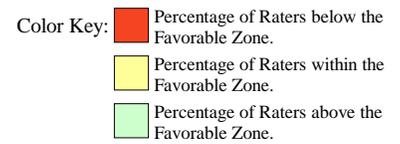
## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Brando, Stella

Snell, Sue



## *Builds Personal Relationships*

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

The following Managers were provided recommendations for improvement in the Skill Set 'Builds Personal Relationships' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Report, Cindy	67%	33%	
Trial, Cynthia	42%	25%	33%
Example, Dan	17%	25%	58%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Sample, Sally	42%	33%	25%
Test, Michael	25%	67%	8%
Training, Jill	25%	58%	17%
Fitzgerald, Daisy	22%	44%	34%
Walker, Darcy	20%	40%	40%
Manager, Waldo	17%	42%	41%
Brando, Stella	9%	27%	64%
Service, Darlene	9%	27%	64%
Break, Anita	8%	50%	42%
Salmon, Kilgore	8%	42%	50%
Name, Alicia	8%	33%	59%

## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Manager scored above or within the Favorable Zone and was not provided recommendations for improvement in this Skill Set.

Snell, Sue

# Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

## Achieves Results

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

The following Managers were provided recommendations for improvement in the Skill Set 'Achieves Results' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Sample, Sally	55%	27%	18%
Snell, Sue	22%	22%	56%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Service, Darlene	45%	27%	28%
Test, Michael	42%	33%	25%
Trial, Cynthia	27%	9%	64%
Name, Alicia	25%	33%	42%
Report, Cindy	25%	33%	42%
Break, Anita	18%	36%	46%
Brando, Stella	18%	36%	46%
Training, Jill	8%	50%	42%
Example, Dan	8%	8%	84%

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Fitzgerald, Daisy  
 Salmon, Kilgore

Manager, Waldo  
 Walker, Darcy

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Adjusts to Circumstances*

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

The following Managers were provided recommendations for improvement in the Skill Set 'Adjusts to Circumstances' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Brando, Stella	18%	55%	27%
Break, Anita	17%	42%	41%
Example, Dan	8%	50%	42%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Report, Cindy	42%	42%	16%
Sample, Sally	42%	25%	33%
Test, Michael	33%	50%	17%
Trial, Cynthia	33%	33%	34%
Fitzgerald, Daisy	22%	44%	34%
Service, Darlene	18%	55%	27%
Walker, Darcy	17%	67%	16%
Name, Alicia	8%	50%	42%
Training, Jill	8%	50%	42%
Manager, Waldo	8%	25%	67%

## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Salmon, Kilgore

Snell, Sue

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Takes Action*

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

The following Managers were provided recommendations for improvement in the Skill Set 'Takes Action' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Brando, Stella	27%	55%	18%
Service, Darlene	27%	45%	28%
Name, Alicia	8%	58%	34%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Sample, Sally	50%	25%	25%
Test, Michael	25%	50%	25%
Fitzgerald, Daisy	22%	44%	34%
Snell, Sue	20%	40%	40%
Report, Cindy	18%	36%	46%
Trial, Cynthia	17%	33%	50%
Manager, Waldo	17%	8%	75%
Break, Anita	8%	58%	34%
Training, Jill	8%	42%	50%
Salmon, Kilgore	8%	25%	67%

## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Example, Dan

Walker, Darcy

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Works Competently*

**Works Competently:** Has mastered the fundamentals of the job. Can quickly and competently apply new methods and new information to appropriate tasks.

The following Manager was provided recommendations for improvement in the Skill Set 'Works Competently' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Fitzgerald, Daisy	33%	33%	34%
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The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Sample, Sally	42%	58%	
Test, Michael	25%	42%	33%
Trial, Cynthia	25%	17%	58%
Service, Darlene	18%	45%	37%
Training, Jill	17%	25%	58%
Break, Anita	17%	25%	58%
Name, Alicia	17%	25%	58%
Report, Cindy	17%	25%	58%
Snell, Sue	10%	40%	50%
Brando, Stella	9%	36%	55%
Manager, Waldo	9%	9%	82%
Salmon, Kilgore	8%	92%	

## Organizational Development Priorities, Cont.

Color Key:  Percentage of Raters below the Favorable Zone.  
 Percentage of Raters within the Favorable Zone.  
 Percentage of Raters above the Favorable Zone.

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Example, Dan

Walker, Darcy

# Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

## *Instills Trust*

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

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Sample, Sally	58%	17%	25%
Trial, Cynthia	42%	33%	25%
Report, Cindy	27%	18%	55%
Fitzgerald, Daisy	22%	11%	67%
Brando, Stella	18%	82%	
Test, Michael	17%	42%	41%
Service, Darlene	9%	27%	64%
Training, Jill	8%	42%	50%
Break, Anita	8%	33%	59%
Manager, Waldo	8%	17%	75%

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Example, Dan  
 Salmon, Kilgore  
 Walker, Darcy

Name, Alicia  
 Snell, Sue

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Works Efficiently*

**Works Efficiently:** Makes efficient use of current technology and wise use of outside resources. Avoids procrastination and sets priorities.

The following Managers were provided recommendations for improvement in the Skill Set 'Works Efficiently' according to their CheckPoint Report. Follow-up is strongly recommended to optimize performance.

Service, Darlene	30%	60%	10%
Break, Anita	18%	55%	27%

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Sample, Sally	42%	33%	25%
Fitzgerald, Daisy	22%	33%	45%
Report, Cindy	18%	55%	27%
Test, Michael	17%	58%	25%
Manager, Waldo	17%	8%	75%
Snell, Sue	10%	60%	30%
Brando, Stella	9%	45%	46%
Trial, Cynthia	9%	45%	46%
Training, Jill	8%	67%	25%
Name, Alicia	8%	42%	50%

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Example, Dan  
Walker, Darcy

Salmon, Kilgore

## Organizational Development Priorities, Cont.

Color Key: ■ Percentage of Raters below the Favorable Zone.  
■ Percentage of Raters within the Favorable Zone.  
■ Percentage of Raters above the Favorable Zone.

### *Displays Commitment*

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

The following Managers were **not** provided recommendations for improvement in this Skill Set because other Skill Sets were listed as critical and needing more attention. However, they are listed here as they did have respondents that rated them below the Favorable Zone. You may want to consider them for training as described in this report.

Trial, Cynthia	42%	58%	
Test, Michael	25%	42%	33%
Sample, Sally	25%	25%	50%
Service, Darlene	18%	55%	27%
Report, Cindy	17%	33%	50%
Snell, Sue	10%	40%	50%
Break, Anita	8%	33%	59%

The following Managers scored above or within the Favorable Zone and were not provided recommendations for improvement in this Skill Set.

Brando, Stella  
 Fitzgerald, Daisy  
 Name, Alicia  
 Training, Jill

Example, Dan  
 Manager, Waldo  
 Salmon, Kilgore  
 Walker, Darcy

## Section III - Organizational Training Need Analysis

It is recommended that the individuals identified as having scores below the Favorable Zone in these Skill Sets participate in a development program that focuses upon improving their abilities.

### **SkillBuilder**

Before embarking upon any formal development program it is advisable to provide these Managers with an opportunity to focus more clearly upon their specific requirements. SkillBuilder is a self-paced online system that will help each participant do just that.

Skill Builder has 18 modules corresponding to the Skill Sets that are measured in the Checkpoint 360 report. These modules provide questions and online exercises as well as guidance for the utilization of a coach or mentor.

In many cases the depth of SkillBuilder is such that no further training intervention is necessary to effect the suggested behavior changes. Ask your Checkpoint Administrator for more details on SkillBuilder modules.

### **Program Specifications**

The following section lists specifications for development of each of the eighteen (18) Skill Sets. These specifications may be used to facilitate the development of Skill Set specific training.

# Training Need Analysis: Delegates Responsibility

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Delegate to Free Up Time and to Develop Staff.**

- Acknowledge that others can handle some tasks as competently as they can. Maybe better.
- Examine their workloads and determine tasks that can be handed over to others.

### **Delegate to the Best Person for the Circumstances.**

- Survey individuals to see what duties they'd be interested in tackling.
- Match people's strengths with work assignments.
- Present small, challenging tasks to people with untested abilities. See if they can rise to the occasion.
- Where they know a person is trying to improve a skill, provide opportunities for practice.
- If no one has the qualifications for a particular task that needs to be delegated, arrange for the necessary training.
- Consider the workloads of others when delegating. Shift responsibilities as necessary.

### **Oversee, But Don't Over-Control.**

- Give as much direction as necessary to initiate people to new duties. Then let them take charge, while avoiding "hovering." During periodic progress reviews, give additional direction as needed.
- Make their expectations explicit and thorough, allowing some flexibility in implementation.
- Clarify which actions will require prior approval from them. Learn to gradually increase an appointed person's authority to act independently.
- Delegate in stages when appropriate. Work up to the point at which complete responsibility is transferred.
- Encourage others as they take on new responsibilities. Give positive feedback whenever possible.
- Remember that failure can be a great teacher. Shield people in newly delegated positions from disastrous mistakes, but allow the opportunity for smaller errors that can be instructive for the future.

### **Let Others Sharpen Their Problem-Solving Skills.**

- When people present problems, they should ask them for possible resolutions before offering their advice - guiding their people in becoming solution-oriented.
- Show confidence in their people's abilities to craft workable, successful solutions to problems.

# Training Need Analysis: Seeks Improvement

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Learn from Mistakes.**

- Keep in mind that a mistake only becomes a failure if they fail to learn from it.
- Avoid blaming others and take responsibility for their mistakes.
- In analyzing mistakes, discuss with others what was done right and what could have been done differently.
- Spend some time reflecting on mistakes, then put the past behind them.

### **Learn from Criticism.**

- Accept negative feedback as performance improvement information. Use it constructively to become more capable on the job.
- Realize that self-perceptions of performance may be different from the perceptions of others.
- Avoid becoming angry or defensive. Giving negative feedback is hard enough. If they make it more difficult, they may stop the flow of valuable developmental information.
- Request feedback. Let others know that they are open to suggestions - and thank them for their honesty.

### **Commit to Lifelong Learning.**

- Stay current with business-related information, as it becomes outdated.
- Improve their existing skills and learn new ones.
- Discover how they learn best, then use all resources to develop competencies.
- Take a self-directed approach to learning, do not wait for someone to push them.
- Keep growing and changing; it is a law of nature and of business.

# Training Need Analysis: Listens To Others

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Create Opportunities from Listening.**

- Understand how to encourage others to share their opinions, even those that may differ from their own.
- Be open to accepting constructive criticism in the spirit in which it is provided, avoiding a defensive stance.
- Focus upon drawing out new ideas from colleagues in brainstorming sessions where judgment is suspended to ensure the free flow of ideas.
- Ask open-ended questions that will lead to answers that are more informative than 'yes' or 'no,' while always allowing plenty of time for considered responses, avoiding the appearance of impatience.
- Allow time in meetings so that even non-agenda items that are raised can be discussed.

### **Really Listen.**

- Give people their undivided attention, avoiding the temptation to simultaneously tend to other business while listening. When other work is urgent, Participants must learn to schedule a later time to discuss the issue at hand.
- Concentrate on what's being said, as opposed to thinking about their responses while others are talking.
- Avoid interrupting to allow others to finish expressing their thoughts.
- Make genuine attempts to understand the position of others on issues, taking time to consider all issues from others' perspectives.

### **Pay Attention to Non-Verbal Behavior**

- Be sensitive to body language that signals agreement or enthusiasm while being watchful for any signs of resistance, fear, anxiety or anger.
- Probe for genuine responses by asking relevant questions that follow up on observations.
- Appreciate the value of silence, understanding how it provides everyone with an opportunity to assimilate information and develop his or her thoughts.

### **Let People Know They're Listening.**

- Before they respond, summarize what they heard to make sure they have understood.
- Use eye contact effectively and provide other non-verbal assurances such as nodding or smiling to show that they're listening. Show interest in the viewpoints of others.

# Training Need Analysis: Thinks Creatively

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Make Continuous, Creative Improvements.**

- Avoid becoming too comfortable with the status quo, rather constantly looking for new opportunities and improved ways of doing business.
- Develop their curiosity, not only about business-related matters but also about the world in general.

### **Involve Everyone in the Sharing of Ideas.**

- Encourage others to contribute their ideas. Fully consider an idea's merits before evaluating its drawbacks.
- Give recognition to staff members who come up with innovations making a positive impact on the business.
- Ignore all restrictions, policies and established methodologies at the outset of a brainstorming session. Let ideas flow freely, unlimited by boundaries of any sort. Particularly avoid any reference to how "it's always been done."

### **Accept Risks as Part of the Success Equation.**

- Realize that actions with the greatest potential benefits usually carry some risks; that to achieve optimum long-term results, risk-taking will be necessary.
- Analyze risks and realistically determine worst-case scenarios.
- Figure ways to reduce, not completely avoid, risks.
- Accept the occasional failures that are bound to occur when innovation is promoted. Nothing ventured, nothing gained.

### **Adopt the Attitude That Problems Are Opportunities.**

- Stay positive. A problem may constructively redirect a course of action.
- Look at an obstacle as a challenging puzzle to be solved. Realize that several workable solutions probably exist.
- View a dilemma from multiple perspectives. Step out of their roles and look at the problem from an entirely different perspective.

# Training Need Analysis: Cultivates Individual Talents

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Become an Effective Coach.**

- Make it a point to know the career goals and aspirations of others. Help plan the development needed to achieve their goals.
- Be patient with mistakes. Make sure that they fully understand all the circumstances. Turn the error into a learning experience.
- Teach skills in chronological, incremental steps. Adjust the pace to fit the individual.
- Ask others how they can assist in their professional development.

### **Make Learning Opportunities Available.**

- Delegate challenging tasks or give targeted assignments to help others develop their potential.
- Provide as many opportunities as possible for people to learn different aspects of the business.
- Keep their eyes on the company's needs, as well as on personal development needs, when planning learning activities. What benefits the company will also benefit the individual.
- Look for training opportunities that will allow others to build on their existing talents and experience.
- Share books, tapes, journal articles, newsletters and conference notes that might prove helpful to an individual working on a particular skill.

### **Give Feedback Regularly.**

- Make sure that appraisals are constructive. Approach them as the starting point for making positive changes.
- When people are not performing up to expectations, promptly and frankly discuss the situation with them. Use tact. Listen. Help them identify ways to improve.
- Criticize performance, not the person.
- Express confidence in a person's ability to improve performance.
- Be generous in giving positive feedback. Make it as specific as possible.
- Schedule regular performance reviews. People need timely feedback on both skills needing attention and skills showing improvement. Schedule regular follow-up meetings, also.

# Training Need Analysis: Processes Information

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Zero-In on the Main Point.**

- Clearly define an issue's key elements before pursuing steps toward a solution or course of action.
- Assemble all the pieces involved in a business matter in order to clearly analyze the “big picture.”
- Stay on track when researching an issue. Avoid spending time on material that is irrelevant to the goal at hand.
- Read and analyze company reports, budgets and financial statements relevant to the matter under consideration.

### **Take a Broad, Comprehensive Overview of Every Situation.**

- Anticipate problems or potential difficulties. Weigh these against expected benefits.
- Consider both the short and long-term effects of a proposed action.
- Know the long-range objectives of the business and make sure decisions are consistent with those plans.
- Take into account all pertinent data and alternative approaches.
- Evaluate the impact that decisions will have on co-workers and clients. Take their perspectives into consideration when reviewing any issue.
- Consider the lessons of history, circumstances of today and projections for the future.
- Know their competition.

### **Come to a Workable Conclusion.**

- Draw practical applications from provided information.
- Be able to logically explain the rationale for any decision they make.
- Formulate plans that others can easily understand and support.

# Training Need Analysis: Facilitates Team Success

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Handle Conflict in a Direct and Effective Manner.**

- Avoid ignoring conflict.
- Do not expect a conflict-free workplace. Recognize that some discord is inevitable and constructively dealing with it will create a more productive work environment.
- Listen carefully to all viewpoints in a disagreement. Define the problem. Then begin the process of resolution.
- Explore multiple options. Then resolve differences with solutions that are acceptable to all involved parties.

### **Encourage Cooperation in Order to Reap the Benefits of a Strongly Unified Group Effort.**

- When recognizing outstanding performance, go beyond the acknowledgment of individual successes. Give equal emphasis to team achievements and effective cooperation among team members.
- Validate the importance of each and every team member's contribution.

### **Learn to Collaborate on Team Decisions.**

- Practice the art of compromise when making decisions, creating win/win situations.
- Involve the team in considering alternative approaches to gain support for decisions. Strive for consensus in order to increase commitment to the final decision.

### **Establish Team Objectives.**

- As much as possible, involve the team in formulating goals consistent with, and supportive of, the overall mission. Also solicit input when planning the implementation to achieve goals.
- Make sure everyone understands the team's goals, as well as their role in attaining the goals.
- Keep everyone apprised of team progress.

### **Develop Group Dynamics That Bring Out the Best in Everyone.**

- Recruit individuals with talents that will complement the skills of other team members.
- Capitalize on each individual's strengths and experiences to create a potent team effort.

# Training Need Analysis: Provides Direction

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Outline Expectations.**

- Clarify each team member's responsibilities for accomplishing objectives.
- Develop job descriptions that are distinct and specific, not vague and broad. Involve their staffs in constructing these descriptions. Review and revise them often.
- Clearly communicate policies, procedures and guidelines as well as priorities and timelines.
- Make known the expectations for job behavior and attitude. Set standards for performance.
- Explain and answer questions until expectations are perfectly clear.
- Hold others accountable for performance at the level they've outlined. Provide timely feedback about the performance of others.

### **Make Appropriate Work Assignments.**

- Distribute responsibilities so that all bases are covered and efforts aren't duplicated.
- Redirect work that has not been as productive as planned.
- Keep the workload for each individual challenging, yet fair.
- Be available to discuss problems with assignments and to explore solutions.

### **Translate Tomorrow's Vision into Today's Activities.**

- Make sure everyone understands, and feels a part of, the organization's mission.
- Establish short and long-term goals that are consistent with the mission. Continuously track progress.
- Constantly evaluate systems and processes. Make modifications that are in line with the direction of the organization.
- Plan times for team members to report their individual work status, ultimately shaping a comprehensive view of the group effort.
- In planning the steps necessary to complete a project, incorporate a series of checkpoints leading up to the final deadline.
- Plan for, and make available, all necessary resources.

# Training Need Analysis: Communicates Effectively

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Write Clearly, Concisely and Accurately.**

- Outline the important information that they need to cover, organizing their information in a logical, easy-to-follow manner, leaving out unnecessary details.
- Use short, direct sentences. If short, easily understandable words will explain their points, eliminate any longer, more difficult words.
- Proofread and make necessary corrections before distributing any written work. Simple errors affect credibility.

### **Speak Effectively to Groups.**

- Prepare before leading discussion groups. Become familiar with the issues so that they can facilitate productive sessions.
- Rehearse before making any presentations.
- Strive for a conversational, dynamic delivery, avoiding a stiff, formal presentation.
- Observe their audiences for non-verbal cues (such as fidgeting, looking at the clock or appearing puzzled) that indicate they need to inject more enthusiasm or clearly explain a point.
- Record or videotape themselves speaking to a group. Review it later, receiving feedback on what they did well and what they could do better.
- Make sure that their main points are crystal clear and that their supporting points are well organized.
- Ask others for feedback to assure that their messages came across as planned.

### **Speak Effectively to Individuals.**

- Avoid procrastination or evasion when they must communicate negative information. When it concerns others, they must learn how to remain sensitive, yet direct. When it concerns themselves, they must understand how to fully explain a situation and take appropriate responsibility.
- Stay on target when writing or speaking, avoiding rambling or taking off on a tangent; remaining direct, to the point, clear and concise.
- Recognize the non-verbal messages that they give through their facial expressions, posture and gestures.
- Keep others informed. Use letters, memos, bulletin boards, meetings, progress reports, telephone calls, faxes, e-mail, voice mail and all other available forms of communication to keep key people informed of key developments. Also make pertinent documents, associated files and relevant resources available to others involved in a mutual project.
- Promptly return phone calls and respond to letters, memos, etc.

# Training Need Analysis: Motivates Successfully

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Encourage Others by Giving Recognition and Showing Appreciation for Their Efforts.**

- Realize that everyone needs to feel valued and appreciated.
- Understand the motivating power of recognition and rewards.
- Never pass up an opportunity to acknowledge a job well done.
- Never pass up an opportunity to show gratitude for extra effort, hard work, or long hours.
- Let others in the company know of the accomplishments of their team members.
- Give recognition to deserving people as soon as possible after their achievement.
- Make sure everyone's contribution to a successful group effort is acknowledged.
- To keep morale up, don't wait until completion of a lengthy project to celebrate. Recognize milestones along the way. Celebrating small victories will promote continued progress toward their goals.
- Use traditional forms of recognition (like the company newsletter) and rewards (a bonus check), but also come up with some appropriate, creative ways to reward outstanding performance.
- Give frequent praise to reinforce positive behaviors.
- Realize that short phrases like "thank you," "good job" and "nice work" can have big impact.
- As much as possible, make the work experience challenging and satisfying.

### **Be a Positive Influence in the Work Environment.**

- Convey an optimistic, can-do attitude. Expect great results.
- Address problems, but don't dwell on them.
- Provide encouragement during stressful times.
- Create an atmosphere where there is enthusiasm for a project and support for one another.
- Look for ways to make the workplace enjoyable.

# Training Need Analysis: Builds Personal Relationships

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Sense the Impact of Words and Actions on Others.**

- Play their parts in keeping morale up, as much as possible, making others feel good about themselves and their work.
- Ensuring that joking is never offensive and that kidding is never demeaning.
- Listen closely to others in order to fully understand all sides and aspects of an issue before responding to a situation.
- Apologize if they realize they've been insensitive.

### **Show Respect for All.**

- Avoid labeling, pigeonholing, or prejudging anyone.
- Be consistent and fair in their treatment of all people.
- Recognize that differences enhance the workplace, contributing a rich mix of experiences and viewpoints.
- Focus on commonalities, the core values that draw everyone together, while still appreciating the uniqueness of each individual.

### **Keep Critiques Constructive.**

- Criticize actions, not people.
- If they need to address a problem with an individual, find a time and place to hold a confidential, one-to-one discussion.
- Make sure a criticism includes specific suggestions for desired improvements.
- In addition to constructive feedback, point out positive behaviors they've observed.

### **Don't Let Their Emotions Escalate a Crisis.**

- Work to remain calm and objective in times of stress.
- Briefly remove themselves from adverse situations if they feel they might lose their composure, returning when they have put the situation in perspective and can react effectively to deal with it.

# Training Need Analysis: Achieves Results

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Develop the Patience and the Will to Overcome Adversities.**

- Bounce back from disappointments and forge ahead. Stay focused on the ultimate objective.
- Learn from mistakes.
- Approach problems as opportunities.
- Use humor to keep difficulties in perspective.
- View obstacles as challenges that will build their leadership skills.
- Take pride in achieving a hard-won success.

### **Focus on Quality.**

- Set high standards for performance in every aspect of the business.
- Involve everyone in the commitment to quality. Make sure everyone understands that excellence is good business.
- Constantly evaluate the quality of work produced.
- No matter how well things are going, realize that improvements are always possible.
- Solicit suggestions from clients.
- Work to find ways of consistently exceeding client expectations.

### **Resolve to Achieve a Positive Outcome.**

- Have a clear idea of what they want to accomplish. Ignore, or quickly take care of, distractions. Stay on course.
- Direct efforts toward achievements that contribute to the team's goals and the company's mission. Avoid becoming sidetracked by unimportant activities.
- Learn what has worked, and what has not, in previous projects similar to theirs. Examine the reasons. Use that information to help ensure success.
- Lead with a sense of purpose and make sure everyone is aware of the vision.
- Develop a results-oriented team. Celebrate together when goals are successfully accomplished.
- Go the distance.

# Training Need Analysis: Adjusts to Circumstances

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Respect, and Capitalize on, the Range of Differences That Individuals Bring to the Group.**

- Understand that while their approaches to work may be correct, this doesn't make theirs the only correct approaches.
- Realize that contrasting work styles can complement one another and make for a stronger overall outcome.
- Maintain focus upon the bottom line and remain flexible about processes and procedures.
- Take into account the input they receive from all levels in the organization.
- Keep an open-minded, willing-to-learn attitude in diverse settings and situations.
- Pursue experiences outside the norm for them. Learn to adapt to, and become confident in, a variety of environments with differing expectations.

### **Learn to Deal Effectively with Unexpected Problems and Sudden Crises.**

- Develop the habit of assuming the best instead of the worst. A small problem can set in motion activities that lead to big improvements.
- Keep things in perspective. Avoid agonizing over minor adjustments to the big plan.
- Figure out where things went wrong. Decide what they could do differently next time to prevent a similar setback.
- Keep a sense of humor.

### **Know That the One Thing You Can Always Count on is Change.**

- Accept changing circumstances as inevitable and plan for them as much as possible.
- Don't assume that business as usual will keep clients loyal. Anticipate clients' changing needs.
- Always have contingency plans.
- Read current business books and periodicals, as well as general interest materials. Learn to spot trends and apply them to the business.
- Be proactive. Choose change instead of waiting to react to it.

# Training Need Analysis: Takes Action

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **In Making Plans and Decisions, Know When It's Time to Take Action.**

- Avoid snap decisions on important matters. Spend a reasonable amount of time analyzing alternatives.
- Recognize when sufficient facts have been gathered to make informed decisions. Don't delay beyond that point. Make the decision.
- Resist holding up projects with constant waffling and indecision.
- Communicate fully the terms of a decision and its ramifications. Let others know that negotiations are over for now and that the present intent is to make the plan work.
- Become accustomed to making quick decisions on routine business matters, and then get on with other concerns.
- Determine not to allow fear of a wrong move to hamper their actions. Know that they can make adjustments to their plans later if necessary.

### **Exercise Initiative.**

- Resist waiting to be told that a task needs doing. Just do it.
- Pitch in where needed, even if the task falls within another person's area of responsibility.
- Take charge of implementing positive changes in the workplace.
- Concentrate their energies on matters where they can make things happen.
- Know what's expected of them and then go beyond.

### **Learn to Deal Promptly with Problems.**

- When faced with a problem, use their time to look for solutions, don't waste time blaming or complaining.
- Be proactive. Choose to address problems instead of ignoring them or making excuses for non-action.
- Respond quickly to client concerns.

# Training Need Analysis: Works Competently

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Develop Competence and Confidence in All Aspects of the Job.**

- Ensure that they understand the key duties of their jobs and become knowledgeable about all procedures involved in those duties.
- Become familiar with information that relates to and supports the jobs they perform. Know the overall operation of the business.

### **Make Learning an Ongoing Process.**

- Constantly upgrade their skills to keep pace with change.
- Find appropriate methods to increase their capabilities in any areas where they lack adequate skills.
- Plan to keep up-to-date with advances in their fields by attending conferences and reading current magazines, newsletters and journals.
- Create opportunities to network with others who can provide new insights into their particular jobs and the business as a whole.

### **Change with the Times.**

- Initiate changes that will keep them in step with, or take them beyond, the competition.
- Encourage others to introduce new ideas based on current trends.
- When they learn of a new theory that has relevance to the business, find ways to incorporate it effectively.
- Resist depending on yesterday's solutions for today's problems.
- Anticipate clients' future needs and wants.

# Training Need Analysis: Instills Trust

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Keep Promises.**

- Avoid making promises that they can't or won't keep.
- If circumstances beyond their control affect a commitment, make sure those involved are informed about the situation promptly.

### **Keep Confidences.**

- If they agree to keep certain information confidential, keep the promise. If they have any doubts about whether they can abide by their agreements, don't enter into them.
- Know which company records are open and which are classified.

### **Be Honest and Forthright.**

- When asked difficult questions, give truthful, straightforward answers whenever possible. When it's not possible to share information, explain the reason.
- Take responsibility for their mistakes, avoiding excuses or trying to place the blame on others.

### **Demonstrate Integrity.**

- Keep their actions consistent with their words, showing character through both.
- Meet deadlines, keep appointments, be on time or be prepared with a sound explanation.
- Take a stand for their beliefs and values.
- Be certain that they defend their actions based on the highest, best intentions.
- Lead by example.

### **Encourage Organization-Wide Ethics.**

- Acknowledge others for making ethical choices. Promote high standards of behavior from everyone around them.
- Know the organization's ethical policies. If a specific policy does not exist for a situation they are facing, and they are uncertain about the course to take, be prepared and confident to consult with their managers and other key individuals.

# Training Need Analysis: Works Efficiently

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Benefit from Technology.**

- Recognize the role that technology can play in increasing production. Be willing to make the necessary investment.
- Become proficient in the application of new technology. Commit to an ongoing learning process to stay current with applicable technological advances.

### **Ask for Help When Necessary.**

- Evaluate the cost-effectiveness of outsourcing certain work to independent contractors.
- Solicit the services of outside resources when the need for specific expertise is clear.
- Arrange for outside consultations for short-term, targeted projects.

### **Take Action Instead of Procrastinating.**

- Avoid putting off the start of a big project because it seems overwhelming. Take action.
- Schedule precise times to handle matters they've been successfully postponing - making sure to keep these appointments.

### **Establish Priorities.**

- Decide what is truly important, refusing to let inconsequential activities swallow up valuable time. The way they spend their time should be a direct reflection of their priorities.
- Have the discipline to say "no" to activities that will divert them from their highest priorities.
- Eliminate or delegate tasks that are unimportant to their primary objectives. Tackle remaining tasks in the order of their importance.
- Adjust priorities as the situation warrants. Keep everyone informed of the priorities as they evolve.

# Training Need Analysis: Displays Commitment

## **Program Specification**

Any program you design or procure to address this requirement will need to focus upon development of skills and behaviors that will help Managers to:

### **Bring a High Level of Energy to the Workplace.**

- Strive for a healthy lifestyle, including good eating habits and regular exercise.
- Learn ways to manage stress.
- Surround themselves with people who energize them.
- Involve themselves in activities that interest and challenge them.
- Do what they can to make work fun.
- Find the right balance of work, family, health, personal goals and service in their lives.
- Constantly learn and look for new ways to do things.

### **Be Persistent.**

- Show their commitment to the company's mission through their attitudes and actions.
- When they're forced to a standstill, consider new methods to get out of the stall. Seek advice.
- Take an active approach to solving problems.
- Build resilience. Learn to cope with and overcome difficulties.
- Exhibit a never-give-up attitude. Finish what they start.

### **Remain Positive.**

- Choose to make positive responses to setbacks.
- Maintain an optimistic view of the big picture as they deal with troublesome details.
- Use humor to keep obstacles in perspective.
- Believe in themselves and their purposes and goals.