PERFORMANCE EVALUATION OF PARTNERS TO STAFF USING 360° DEGREE ASSESSMENT

Gatto Associates, LLC
750 Washington Road
Pittsburgh PA 15228
412-344-2277
Rex Gatto, Ph.D., BCC
www.regatto.com
Soft skills are personal attributes that enhance an individual's interactions, job performance and career prospects.

Unlike **hard skills**, which are about a person's skill set and ability to perform a certain type of task or activity, soft skills are interpersonal and broadly applicable.

Soft skills are often described by using terms often associated with personality traits, such as:

- optimism
- common sense
- responsibility/growth and development
- a sense of humor
- Integrity/ethics
Abilities that can be practiced (but require the individual to genuinely like other people) such as:

- Empathy
- Teamwork
- Leadership
- Give and receive feedback
- Communication
- Good manners/etiquette
- Negotiation
- Sociability
- Ability to teach.
OVERVIEW

Defining Evaluation of Talent

Feedback and Development

Three 360° Assessments

• Anatomy of an Accountant
• Partner Manager 360° Evaluation
• Leadership 360°
OVERVIEW

Defining Evaluation
EVALUATE TALENT

Key
- to organizational success is to ensure partners are in a growth and developmental process

Focus
- on skills, behaviors, and needed technical knowledge

Demonstrated
- measurable growth each year
This process outlines strengths and talents through self-assessment, upward (staff), manager, and partner reviews.

Partners through this process become role models for appropriately receiving feedback and demonstrating how to effectively utilize it.
EVALUATION

Creates a mechanism that can support effectiveness within the firm through evaluation of the level of skills needed to: accomplish partner, niche, and firm goals
Implementing this process for partners is most effective in establishing the behavior patterns needed to sustain your firm now and in the future.

List the top three characteristics for Partners (managers) in your firm.
SMART GOALS

A way of evaluating the objectives or goals for an individual project/engagements.

The term is also in common usage in performance management, whereby goals and targets set for partners to staff must fulfill the criteria.
# SMART GOALS

<table>
<thead>
<tr>
<th>Letters</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific</td>
<td>Significant, stretch, meaningful, BHAGS</td>
</tr>
<tr>
<td>Measurable</td>
<td>Motivational, manageable</td>
</tr>
<tr>
<td>Attainable</td>
<td>Actionable, aligned, achievable</td>
</tr>
<tr>
<td>Relevant</td>
<td>Realistic, results oriented, rewarding</td>
</tr>
<tr>
<td>Time-bound</td>
<td>Timed, timely, time-limited</td>
</tr>
</tbody>
</table>
INTROSPECTION (ACTION PLANNER)

Be **SMART:**
Specific, 
Measurable, 
Action oriented, 
Realistic and 
Time bound
SMARTER

- Specific
- Measureable
- Actions
- Realistic
- Time-bound
- Enthusiastic
- Rewarded

SET S.M.A.R.T.E.R GOALS!!!
A process, involving staff and firm leaders that supports individual growth, which leads to firm growth.
We define the metrics for performance factors that create consistency through a common descriptive performance language.

We can measure firm, departmental/niche, and individual performance.
PARTNER, MANAGERS, AND STAFF, THROUGH AN ASSESSMENT PROCESS:

- Complete the assessment on line
- Receive Feedback
- Develop an Action Plan
- Demonstrate how to effectively utilize feedback
To create consistency within the firm, people should have a clear understanding as to the motivational, behavioral actions they will take and what level of performance is needed.

Behaviors are discussed (debrief): highlights, strengths, and areas for development.

Action Plan developed and implemented
COMMON LANGUAGE

• Create a common language for development by identifying the level of functional performance

• Identify the right actions and enhancement areas

• Create firm consistency through a process that supports development.
A process involving staff and firm leaders that supports individual growth, which leads to firm growth.
TYPES OF ASSESSMENTS

• Anatomy of a CPA
• Partner/Manager 360° Assessment
• Leadership Profile Assessment
Anatomy of a CPA

Personalized Feedback Report for Joe Sample
Research indicates that every job function can be broken into a series of skills (dimensions) set to fulfill responsibilities.

Job analysis: identifies tasks, processes, functions that makeup the job responsibilities.

Job competency factors needed to be successful in a firm.
SKILLS FACTORS

Client Relationship  
Communication  
Business knowledge  
Problem solving  
Computer knowledge  
Practice development  
Interpersonal  
Leadership  
Professional presence

Planning  
Creativity  
Accountability  
Initiative  
Teamwork  
Adaptability  
Integrity  
Competence

The combination of the above skills/competencies can highlight ability.
## ANATOMY OF A CPA

### Client Relationships -- Performance Level

<table>
<thead>
<tr>
<th>Questions</th>
<th>Respondents</th>
<th>Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you demonstrate good organizational skills</td>
<td>n: 7</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>M: 3.43</td>
<td>4</td>
</tr>
<tr>
<td>Do you maintain clear and organized work papers</td>
<td>n: 7</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>M: 4.29</td>
<td>5</td>
</tr>
<tr>
<td>Do you meet client expectations</td>
<td>n: 7</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>M: 3.86</td>
<td>4</td>
</tr>
<tr>
<td>Do you follow through with client needs</td>
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<td>1</td>
</tr>
<tr>
<td></td>
<td>M: 4</td>
<td>5</td>
</tr>
<tr>
<td>Do you maintain good client working relationship</td>
<td>n: 7</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>M: 4.43</td>
<td>5</td>
</tr>
<tr>
<td>Do you complete client engagements in a timely fashion</td>
<td>n: 7</td>
<td>1</td>
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<tr>
<td></td>
<td>M: 3.71</td>
<td>3</td>
</tr>
<tr>
<td>Grand Mean</td>
<td>n: 7</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>M: 3.95</td>
<td>4.33</td>
</tr>
</tbody>
</table>

Respondent Analysis 4 (79%) - Self Analysis 4.3 (87%) = -.3
### Client Relationships
#### Rating Distribution, Strengths & Areas for Development

<table>
<thead>
<tr>
<th>Count</th>
<th>Questions</th>
<th>Mean</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Almost Always</th>
<th>Frequently</th>
<th>Sometimes</th>
<th>Infrequently</th>
<th>Rarely</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Do you demonstrate good organizational skills</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>7</td>
<td>Do you follow through with client needs</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>7</td>
<td>Do you maintain clear and organized work papers</td>
<td>4.86</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>86%</td>
<td>14%</td>
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<td>0%</td>
<td>0%</td>
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<tr>
<td>7</td>
<td>Do you meet client expectations</td>
<td>4.86</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>86%</td>
<td>14%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>7</td>
<td>Do you maintain good client working relationship</td>
<td>4.86</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>86%</td>
<td>14%</td>
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<tr>
<td>7</td>
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<td>4.57</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>71%</td>
<td>14%</td>
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<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>7</td>
<td>Grand Mean</td>
<td>4.86</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>88.2%</td>
<td>9.3%</td>
<td>2.3%</td>
<td>0%</td>
<td>0%</td>
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</tbody>
</table>

Count Column = Number of Respondents
Blue Bar = Self Analysis
Green Bar = Average of Respondents’ Rating

Strengths -- 5.0 to 4.2
Some Improvement Needed -- 4.1 to 3.5
Areas for Development -- 3.4 and lower
17 WAYS TO MEASURE A CPA

CATEGORIZED ANALYSES

- Client Relationships: 4.86
- Communication: 4.85
- Business Knowledge: 4.68
- Problem Solving: 4.69
- Computer Knowledge: 4.67
- Practice Development: 4.37
- Interpersonal Relationships: 4.6
- Leadership: 4.73
- Professional Presence: 4.77
- Planning: 4.66
- Creativity: 4.54
- Accountability: 4.83
- Initiative: 4.7
- Team Work: 4.68
- Adaptability: 4.62
- Integrity: 5
- Competence: 4.91
17 WAYS TO MEASURE A CPA

[Graph showing individual and group comparison with various categories and averages indicated by different lines and markers.]
CPAs DO THE FOLLOWING

• Provide the advice and information to people that is needed to make important financial decisions

• Help their clients make sound financial judgments by analyzing and interpreting data

• Examine “what if” possibilities

• Explain complex laws (local, state, and federal), rules, and regulations

• Help clients plan, save, and invest money
Academic, business and practical knowledge

Ability to communicate and connect with (people) clients, partners and staff

Organize, write, analyze, compare, and interpret facts and figures

Understand computers and accounting software

People skills, ability to build relationships

Integrity, trusted advisor
What are your top three skills?

In general what are the top three skills of your partners?

In general what do your clients want from you?
RESULTS FROM ASSESSMENTS
N= 500+ (CPA & CA)

Qualities of High Performers:

• Clearly communicate-follow through with work related priorities

• Have the ability to **Influence** others

• Clearly present details

• Generally non-defensive

• Openly discuss issues and then makes a decision

• Communicate on an equal basis
Qualities of High Performers:

- Involve staff
- Resolve conflict
- Promote a team building atmosphere
- Encourage staff to express ideas
- Build rapport with staff
- Consider associates’ opinions and suggestions with an open mind
Qualities of High Performers:

- Are flexible in meeting changing business priorities
- Supports and helps staff
- Makes timely business decisions
- Innovative
- Meets work related deadlines
In general, what suggestions do you have to enhance this person’s abilities?

Self-assessment
Communication skills
Be more focused on targeting clients for development
Be more focused on developing technical expertise to an advanced level

Respondent
Continued improvement in staff recognition / acknowledgement.
Short notes and positive comments at end of review notes can make staff feel better about job that may have several review notes.
Positive comments at beginning of review notes would be even better.
360 ASSESSMENT

Partner / Manager 360° Assessment

Personalized Feedback Report for
Question 1: Do you effectively act as a firm leader?

Performance Level

<table>
<thead>
<tr>
<th>Number / Mean</th>
<th>RESPONDENTS</th>
<th>PARTICIPANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>n:</td>
<td>12</td>
<td>1</td>
</tr>
<tr>
<td>M:</td>
<td>3.8</td>
<td>4.0</td>
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</tbody>
</table>

Respondent Analysis 3.8 (75%) - Self Analysis 4.0 (80%) = -.2

Rating Distribution

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<th>Mean</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Almost Always</th>
<th>Frequently</th>
<th>Sometimes</th>
<th>Infrequently</th>
<th>Rarely</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>4.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0%</td>
<td>100%</td>
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<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>12</td>
<td>3.8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>25%</td>
<td>33%</td>
<td>33%</td>
<td>8%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Count Column = Number of Respondents
Blue = Self Analysis
Green = Average of Respondents' Rating

Strengths -- 5.0 to 4.4
Some Improvement Needed -- 4.3 to 3.8
Areas for Development -- 3.7 and lower
Question 1: Do you effectively act as a firm leader?

Personalized Feedback

Self Statement
I feel with my other background here with a history and political science degree that I have a spin from a human relations side to assist in personnel issues, hiring and counseling that others might not.

Respondent Statements
focuses more on billable work than managing the firm

sometimes says things in a manner that others find offensive or uncomfortable

more of a follower than a leader

Likes to meet face to face with staff

needs to delegate work; he is too involved with the details and often does the work himself; needs to develop staff by managing the engagement and having staff prepare the work; would like to see him spend time thinking in depth about the future of the department and the steps to take to get it there; needs to communicate firm and staff issues to the manager and seniors so that they can be more effective in leading the department; needs to follow through on department issues
Question 24: Do you follow firm procedures?

Performance Level

<table>
<thead>
<tr>
<th>Number / Mean</th>
<th>RESPONDENTS</th>
<th>PARTICIPANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>n:</td>
<td>10</td>
<td>1</td>
</tr>
<tr>
<td>M:</td>
<td>4.3</td>
<td>5.0</td>
</tr>
</tbody>
</table>

Respondent Analysis 4.3 (86%) - Self Analysis 5.0 (100%) = -.7

Rating Distribution

<table>
<thead>
<tr>
<th>Count</th>
<th>Mean</th>
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<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Almost Always</th>
<th>Frequently</th>
<th>Sometimes</th>
<th>Infrequently</th>
<th>Rarely</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5.0</td>
<td>1</td>
<td></td>
<td></td>
<td>2</td>
<td>5</td>
<td>100%</td>
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<tr>
<td>10</td>
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<td>50%</td>
<td>30%</td>
<td>20%</td>
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</tbody>
</table>

Count Column = Number of Respondents
Blue = Self Analysis
Green = Average of Respondents’ Rating

Strengths -- 5.0 to 4.4
Some Improvement Needed -- 4.3 to 3.8
Areas for Development -- 3.7 and lower
Question 24: Do you follow firm procedures?

Personalized Feedback

Self Statement
This area I do very well and have adopted firm policies in several areas in the last two years here.

Respondent Statements
not always
often tells people things are that are not exactly what the policy is

For the most part
he sometimes is too strict in this; I feel that we have meetings because we are suppose to and he is not stepping back to think outside the box or how does this benefit the department or the firm
works outside of the procedures at times
<table>
<thead>
<tr>
<th>People Issues (4.5) 90% / (4.1) 82%</th>
<th>Leadership (4.2) 84% / (4.3) 86%</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. appropriately mentor/coach those who report to me?</td>
<td>1. effectively act as a firm leader?</td>
</tr>
<tr>
<td>4.0 3.8</td>
<td>4.0 3.8</td>
</tr>
<tr>
<td>10. effectively communicate with clients and others?</td>
<td>2. effectively represent the firm?</td>
</tr>
<tr>
<td>5.0 4.2</td>
<td>5.0 4.4</td>
</tr>
<tr>
<td>16. do what I say?</td>
<td>11. effectively and appropriately follow up?</td>
</tr>
<tr>
<td>4.0 4.1</td>
<td>4.0 4.8</td>
</tr>
<tr>
<td>17. effectively establish trust with others?</td>
<td>19. demonstrate integrity?</td>
</tr>
<tr>
<td>5.0 4.3</td>
<td>5.0 4.5</td>
</tr>
<tr>
<td>23. appropriately give praise to others?</td>
<td></td>
</tr>
<tr>
<td>3.0 4.2</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work-Related Issues (4.6) 92% / (4.4) 88%</th>
<th>Partner Goals/Objectives (4.0) 80% / (3.6) 72%</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. put in the time needed to perform job responsibilities?</td>
<td>12. effectively leverage my time?</td>
</tr>
<tr>
<td>5.0 4.8</td>
<td>4.0 2.9</td>
</tr>
<tr>
<td>4. complete work in a timely fashion?</td>
<td>13. effectively utilize staff?</td>
</tr>
<tr>
<td>4.0 4.3</td>
<td>4.0 3.3</td>
</tr>
<tr>
<td>8. competently perform my work?</td>
<td>15. consistently and effectively bring in new clients to the firm?</td>
</tr>
<tr>
<td>5.0 4.4</td>
<td>4.0 4.0</td>
</tr>
<tr>
<td>21. demonstrate efficient work habits?</td>
<td>18. effectively manage my WIP?</td>
</tr>
<tr>
<td>4.0 4.0</td>
<td>4.0 4.0</td>
</tr>
<tr>
<td>24. follow firm procedures?</td>
<td></td>
</tr>
<tr>
<td>5.0 4.3</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Team Work (3.5) 70% / (4.2) 84%</th>
<th>Clients (4.5) 90% / (4.3) 86%</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. give appropriate feedback on engagements?</td>
<td>6. appropriately meet clients' needs?</td>
</tr>
<tr>
<td>3.0 4.4</td>
<td>5.0 4.2</td>
</tr>
<tr>
<td>7. appropriately recognize people for their contribution to the firm?</td>
<td>14. effectively explain engagements?</td>
</tr>
<tr>
<td>3.0 4.3</td>
<td>4.0 4.4</td>
</tr>
<tr>
<td>20. effectively work with others?</td>
<td></td>
</tr>
<tr>
<td>4.0 4.0</td>
<td></td>
</tr>
<tr>
<td>22. effectively encourage others to express their opinions?</td>
<td></td>
</tr>
<tr>
<td>4.0 4.3</td>
<td></td>
</tr>
</tbody>
</table>

The first number (to the left of the question) corresponds to the question number of the Survey; the second number (to the right) is the average of responses; the number in parenthesis is the topic average.

Blue = Self Rating
Green = Average of Respondents' Rating

Strengths -- 5.0 to 4.4
Some Improvement Needed -- 4.3 to 3.8
Much Improvement Needed -- 3.7 and lower
SUMMARY
WHAT ARE THIS PERSON’S GREATEST STRENGTHS?

**Self-assessment**
Client relationships, new business generation, communications with staff and clients, firm administration and budget review, billing at appropriate levels, critical thinking and decision making

**Respondent**
explains things thoroughly
knowledgable in his core areas
dedicated to the firm

**Respondent**
Technical skills
His clients are loyal to him
High personal billings

**Respondent**
Client service - he has a lot of clients who depend on him and will act upon all of his suggestions.
Marketing - does very well in bringing in clients and has a lot of connections

**Respondent**
very knowledgable, respected by clients, gets the jobs done
LEADERSHIP PROFILE

Leadership Profile Assessment

Personalized Feedback Report for

GATTO ASSOCIATES LLC
The Leader in Workplace Assessments
Section 1 - Leadership Preferences: comprised of four leadership levels based on word descriptors (behaviors) that create a leadership style. Each leadership level establishes a style or mannerisms, which should be based on the need of the follower, the current work situation or environment, and desired results.

<table>
<thead>
<tr>
<th>Leadership Preference Grid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level Three Participate</td>
</tr>
<tr>
<td>Level Four Empower</td>
</tr>
</tbody>
</table>

Section 2 - Dimensions of Leadership: comprised of six dimensions based on statements describing your leadership performance or skills. Each of the six dimensions is an essential skill to be an effective leader. The dimensions, when performed at an appropriate level, are essential for leadership success. The leadership dimensions can be applied concurrently with any of the four leadership levels.

Section 3 - Narrative (Questions and Responses): This section consists of open-ended questions and responses about your leadership ability.
**Four Styles of Leadership**

### Participate
**High involvement with people; low control**
**Score: 26**

**Characteristics**
- Leader trusts the decisions of the followers: cooperation
- Lead and follow cooperatively: co-decision-making relationship; teamwork relationship
- Leader lets the direct reports lead and take charge
- Both create open lines of communication

**Appropriate for:**
- Leading and relying on followers
- Team interaction
- Problem solving cooperatively
- Team approach; rely on established, proven, and competent direct reports

**Problem:**
The followers may feel held back, wanting to move ahead quickly by making decisions. The leader needs to continually update followers.

### Advise / Consult
**High involvement with people; high control**
**Score: 26**

**Characteristics**
- Interaction/dialogue; exchange ideas between the leader and direct reports
- Coach, motivate and advise direct reports
- Guide the direct reports by sharing in the decision making process; leader is still the dominant decision maker but in an advisory, coaching manner.

**Appropriate for:**
- Managing; involving followers
- Knowledgeable direct reports who need encouragement and lack confidence and/or competence to take action or want rapport with leader
- Step-by-step approach to achieving results

**Problem:**
The followers may be demotivated if they feel ready to make decisions and the leader holds them back.

### Empower
**Low involvement with people; low control**
**Score: 32**

**Characteristics**
- Leader recognizes follower has a high degree of competence and confidence
- The direct report needs little encouragement or guidance
- Very little interaction or control; the direct report is a capable decision maker; relationship of mutual trust exists
- Leader values direct report’s actions and decisions and permits the follower to emerge as a leader

**Appropriate for:**
- Allowing followers to lead
- High performers who want to be challenged
- High ability, competence, confidence, autonomous direct reports

**Problem:**
Empower direct reports too soon when they still may need support; this can stifle direct reports’ growth.

### Control / Administer
**Low involvement with people; high control**
**Score: 16**

**Characteristics**
- Authoritative; high control
- Priority towards results
- Primarily the leader controls the decision-making process
- Geared toward getting the job done; task oriented
- Initiate, organize, direct
- Low involvement with people; high control

**Appropriate for:**
- Managing; self-reliant leaders
- Organizing staff
- Direct reports/employees who lack confidence or competence
- Monitoring results step-by-step approach

**Problem:**
The leader may think, “I can do it faster and better than the direct report”, stifling direct report’s growth.
## Leadership Dimensions

### Dimension 1

**Lead by Effectively Communicating**

#### Rating Distribution

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<th>Count</th>
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<td>ability to effectively listen.</td>
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**Self Analysis 4.5 (90%)**

Count Column = Number of Respondents
Blue = Self Analysis

- Strengths -- 5.0 to 4.2
- Some Improvement Needed -- 4.1 to 3.5
- Areas for Development -- 3.4 and lower
WRITE A STATEMENT THAT BEST DESCRIBES THE PARTICIPANT’S OVERALL LEADERSHIP PERFORMANCE.

Self-assessment
Lead by example. Strong work ethic, problem solver, outside the box thinking

Respondent
He is an overall good leader. Needs to delegate more work to others.

Respondent
Solid performer, very, very knowledgeable about his job and seeing the big picture.

Respondent
Gets everyone involved and gets everyone to feel it's a partnership to get to a common goal.

Respondent
Very effective leader, listens to his personal, asked for suggestions and follows through on issues brought forth, always encourages and couches. Very approachable.
ACTION PLAN

• What will you now do differently?

• What actions can you maintain or enhance?

• What actions can you change?
Setting Goals

List professional and personal **goals**, **actions** and any **obstacles** you might encounter in achieving your goals. Share your goals with anyone (partners, managers, spouse) who supports you.

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<th>Goals / Future</th>
<th>Actions</th>
<th>Obstacles</th>
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What is rewarded and recognized, people will move toward and become!
FIRM CHALLENGES

Succession planning creating a deep bench

Making sure the leadership team does not lose sight of the north star, your guiding philosophy

Getting the vision, mission, strategies, and objective aligned through feedback

Ensuring that leaders walk the talk
FIRM CHALLENGES #2

Aligning decision-making, policies, and programs with vision, strategy, and values to performance

Balancing business expectations (short-term) against strategic business objectives (long-term)

Balancing the need to be nimble with the need for critical mass
Challenge your people to become the \textbf{BEST} they can.