



A Guide for Reviewing the Report



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Organizational Management Analysis - A Guide for Reviewing the Report

Notes:

We are pleased to provide you with your **Organizational Management Report**. In providing this report for you, it means quite simply that you have made an investment in the managers and leaders in your company to complete a **CheckPoint 360° Competency Feedback Report** for each of them to set an important foundation for their plans to continually improve in their contribution to their success and the success of the company.

The **Organizational Management Analysis** is another step in the **CheckPoint 360° Competency Feedback System**. The report is designed to give an overview of the information obtained from the completed CheckPoints of a given group of your managers. (The group of managers included in this report is noted in the upper right hand corner of page 1 of each report). The information contained in this report will provide a factual summary of the perception of your management group with input from your managers' bosses, peers, and direct reports.

In its broadest sense, the report includes information in examining the culture of your company and provides insight regarding alignment of your management group to company goals and objectives. It can also be used to gather information related to the expectations for the human capital aspects of your company's long-term strategic objectives. In a more directed information source, it provides **Organizational Development Priorities** and a detailed **Organizational Training Needs Analysis**.

Understanding the Organizational Management Analysis

You may want to keep the guide handy as you work your way through the **Organizational Management Analysis (OMA)** report. It is important that you understand what is in the report. This will help in deciding the most important aspect of the information as it relates to your company. Also, while the report recaps all the information included in the indicated group of managers, the exact meaning of the information will be subject to your relating the information to your company's plans and direction.

On the first page after the cover of the report, in the upper right-hand corner, you will note **your company's name**; the designated **group of managers**, the **name of this report** and the **total number of participants** (managers designated as "Self" in each CheckPoint report) and the **total boss, direct report and peer respondents**. Knowing the make up of the participants and their bosses will be helpful in reading and applying the information provided.

The body of this page provides an introduction to your **OMA**. The introduction leads to the recap of the **8 Universal Management Competencies** and the supporting **18 Skill Sets**. Knowing and understanding the **Competencies** and **Skill Sets** is important as they relate to the application of the report. The following will provide you with a more detailed description of each item:

Communication

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

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

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.

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

Leadership

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

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

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

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

Adaptability

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

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

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

Relationships

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

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

Facilitates Team Success: Resolves conflicts fairly in a spirit of cooperation. Builds consensus and leads team in setting appropriate goals. Recruits effectively and uses talents of group wisely.

Task Management

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

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

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

Production

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

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

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

Development of Others

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

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

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

Personal Development

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

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

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

As you read the report you may want to reference back to the definitions and information related to the **Competencies** and **Skill Sets**.

After the recap of the **Competencies** and **Skill Sets** you will note a definition for the term “**Participant**.” In each of the CheckPoints summarized in the **OMA**, the focus (or subject) of each report was designated as “**Self**” in their respective reports. In the **OMA** we will refer to them as **managers**.

The next page of the **OMA** indicates the three sections of the report. Part 1 is the **Executive Summary** and is broken down as follows:

(Note: The descriptions provided for each section should be referred to when reading each section of report. Page numbers for each area of the report are not referenced as the number of pages in each report will vary depending on the total number of **managers**).

Critical Skill Set Summary – As noted earlier, there are **18 Skill Sets**. When **managers** and **bosses** entered their perceptions when completing the individual CheckPoints, they were asked to designate (independently) **six (6)** of the **Skill Sets** critically important to the particular requirements of the **manager's job**. The schedule indicates the rank order of **Skill Sets** selected by **managers** and **boss(es)**. In each CheckPoint the items selected by the **manager** and their **boss(es)** were clearly indicated. The expectation is that upon completion and review of the reports **boss(es)** and **manager** discussed each item, particularly if there were differences in opinion.

Critical Skill Set Alignment – This schedule by **manager** in descending order, indicates the percentage of alignment between the **manager** and their **boss(es)** in selection of the **Critical Skill Sets**. The alignment of **Critical Skill Sets** (or lack thereof) can be helpful in gauging the effectiveness of relationships between the individuals and lend insight into the performance of each of the **managers** in contributing to company objectives. The schedule also indicates percentage overall alignment of the **manager** and **boss(es)**.

Organizational Development Summary – This schedule presents (in descending order by highest percentage below the favorable zone) a recap of the raters' perceptions of the **managers**. The recap includes all raters (excluding the **managers'** perceptions of themselves) and is listed by **Skill Set**. The favorable zone (as defined at the bottom of page 2 of the report) is an

indicated area within the range of ratings [the CheckPoint uses a rating scale of 0 – 5: - 0 = Not Applicable; 1 = Never; 2 = Seldom; 3 = Sometimes; 4 = Usually; 5 = Always] where a **manager** is looked upon as doing a good job. On the report, based on the 0 – 5 rating system, the favorable zone goes from 3.5 – 4.25.

The report also indicates, in Column 2, the **six (6)** highest **Skill Sets** selected by **managers** and **bosses** (per the “**Critical Skill Set Summary**”). This will give you a comparison of what managers and bosses thought was the most important **Skill Set** compared to where raters thought **managers** needed the most improvement.

This is an important schedule for development needs, **Critical Skill Set** perceptions and overall targeted corporate objectives, aims, goals and culture.

Organizational Development Summary – Direct Reports – Research has indicated that one of the most positive aspects of using **360° feedback in organizations** is the opportunity for **direct reports** to be able to give **honest, straightforward feedback** to their **respective department leaders**. With that opportunity, it is also important to have each **manager** acknowledge the input and have the company be aware of that feedback. This schedule is presented to highlight feedback just from direct reports. The schedule is in the same format as the previous summary. The importance of this information and how to use it will be at the discretion of each company.

Skill Set Comparative Analysis – This schedule is provided to give you a consolidated overview of results of each manager’s CheckPoint. By **manager** you can observe, for all **18 Skill Sets** combined, how each **manager** was rated by themselves, their **boss(es)**, their peers and their direct reports. The analysis will highlight a number of areas such as:

- How does each **manager** see themselves?
- Is there general agreement between **boss** and the **manager** on the **manager’s performance**?
- Is there consensus of perception or significant variances? If so, what are the implications?
- Referencing the “**Critical Skill Set Alignment**” summary is there any correlation between alignment and manager/boss perceptions?

There are any number of other types and kinds of information inferences that can be noted in the recap.

II Organizational Development Priorities – This section of the report lists the **18 Skill Sets** ranked in order as indicated in the **Organizational Development Summary** – All Raters. With each **Skill Set** noted each **manager** that received a recommendation for improvement in that particular **Skill Set** will be listed. The percent below the favorable zone will be noted in descending order. The schedule will also list **managers** that had ratings below the favorable zone, but the **Skill Set** was not listed as a recommendation as there were other **Skill Sets** in their respective CheckPoint reports requiring

more attention. Also, any **managers** who scored within or above the favorable zone and were not provided with any recommendations for approval will be listed. The total number of **managers** listed will always be the total number of “**participants**” noted on page one of the report.

The uses of this information will vary according to the needs of your company. This information will be used to pinpoint training and development needs for **managers** and allow grouping of **managers** for various training venues within your organization. Other uses may include a more detailed evaluation of each of your **managers** and a review of their individual strengths and areas needing development.

III Organizational Training Needs Analysis – This section of the report indicates, by **Skill Set** listed in the order indicated on the **Critical Skill Set Summary**, specifications for development of each of the **Skill Sets**. One of the most important aspects of the **CheckPoint 360° Feedback System** is using the findings and information from each report for the development of each **manager**. After sufficient time for development, a **manager** can take another CheckPoint to measure the perceived changes and improvements. Subsequent CheckPoint reports highlight additional **Skill Sets** that can be developed, thus perpetuating a continuous improvement process.

Each of the **18 Skill Sets** will be reviewed in this section of the report and outline specifics to be addressed when a **manager** needs improvement in the **Skill Set** indicated.

The above information is provided to help get as much information as possible from the **Organizational Management Analysis**. Explanations, highlights and suggested subjective information ideas have been indicated. The amount and value of the information presented will be related to each company's perception of the managerial and leadership of its people and the relation of people to the company's goals, aims, mission and cultural values.

Please contact your Profiles International representative if you have any additional questions.