

SERVICE OFFERING

Executive Team Performance Assessment Process

Goal: To engage senior executives in a talent due diligence process that identifies development and/or hiring needs which, if addressed, increase the odds of success as the organization matures.

Objective: To uncover skill strengths and learning opportunities which drive the executive team's success now and in future evolutionary stages.

Logic:

- Executives who **provide each other with honest feedback on performance and growth** increase their odds of individual and group success.
- Specific senior executive skill profiles appropriate at one point in an organization's growth must yield to others in later evolutionary stages. **Assessment and alignment of executive talent to organization maturity stage offers a proven approach to promote organization success.**

3-Phase Assessment Process¹:



Phase-1: Executives each complete a 75-minute, **face-to-face confidential interview** with a highly trained interviewer to collect their self-assessment of competencies on nine core dimensions. The interaction is based on a structured instrument developed from over 30-years studying leaders through organization evolutionary stages.



Phase-2: A **multi-rater behavioral survey instrument** is used to collect data from others (peers, boss, direct reports, etc.) for each executive. The objective is to prepare for the executive team's reading of individual strengths, contributions, and growth opportunities.



Phase-3: Consolidated assessments are peer-reviewed in a **facilitated Executive Session**. Refinements based on group input are made and then reported back to each executive in a debrief consultation. A written summary along with an outline of learning and development objectives are then discussed in-person or via an electronic session.

¹ Based in part on: "The Conduct of Due Diligence on Leader Talent", by Franco Vicino, Ph.D., MBA and Brent Green, Ph.D., in OD Practitioner: Journal of the Organization Development Network, vol. 32 / no. 2, 2000, pages 33-39.



Effort:

Client will:

- Assign a coordinator to administer the process internally. Includes providing administrative support to: customize and distribute instructions and forms for each executive to fill out; schedule interviews, Executive Sessions, and debriefs; drive those involved to complete and turn-in input forms according to a schedule.
- Provide time and make it a priority for executives to: attend the 75-minute one-on-one interview; fill out and submit input forms for those being assessed; fill out a self-assessment; and prepare for, attend, and participate in the Executive Session to refine consolidated peer assessments.
- Provide time and make it a priority for the CEO and internal coordinator to meet with IntelliVen principals upon completion to review how the process went, what was learned, and identify opportunities for improvement.

IntelliVen will:

- Work with organization coordinator to explain, set up, manage, administer, support, internalize, and institutionalize the evaluation process.
- Provide approximately 6-hours of effort for each executive assessed:
 - 2-hours -- Initial interview preparation, administration, recordation
 - 1.5-hour -- Anonymize, consolidate, prioritize multi-rater input
 - .5-hours -- Facilitate team session
 - 2-hours -- Prepare for and administer results

Pricing: \$3500/Executive assessed plus pro rata share of associated travel expenses approved in advance.

Mechanics: Fill out, sign, and return this [Statement of Work](#) to authorize IntelliVen to commence work.

