

**SAMPLE**

**IntelliVen Executive  
Performance and  
Growth Assessment**

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## Approach

Survey results and suggestions for development presented here are based on data gathered using the **Leadership Skills Inventory Assessment** method adapted from published studies and results.<sup>1 2</sup> Specifically, data from five Milestone Communications executives was collected using:

- A 33-item structured one-on-one, in-person interview with Dr. Green.
- A 44-item on-line skills survey.
- A 5-question on-line performance assessment and development survey.

Collected data was consolidated and then analyzed. The product of these efforts is reported in this document.

Figure 1 displays a chart with bars that align with three sets of core executive skills:

- **Know** or Knowledge Skills
- **Think** or Thinking Skills
- **Act** or Execution Skills

[Review this presentation for an introduction to the Know-Think-Act framework.](#) Read the articles cited in the footnotes below for a complete explanation.

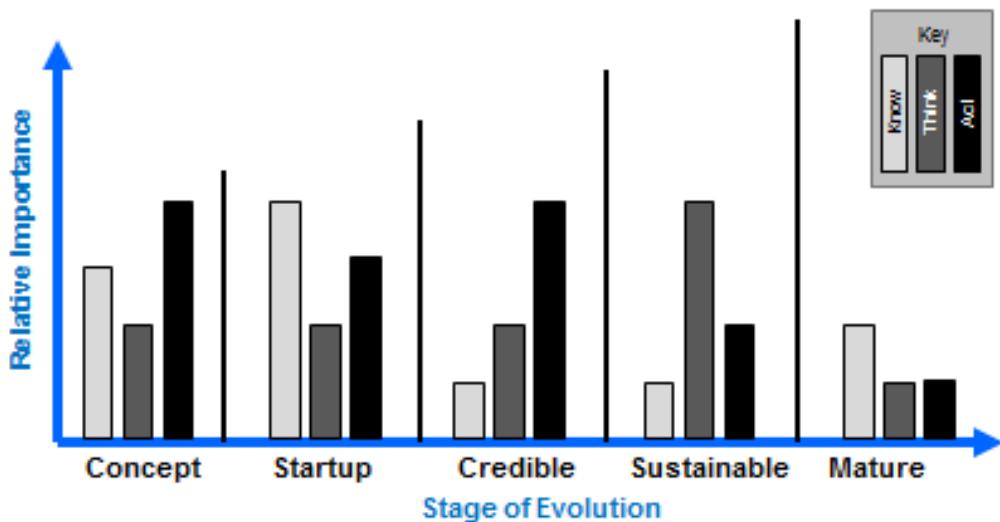
Broadly speaking, an executive in a work situation **Knows** what is relevant to the situation, and then **Thinks** about what s/he knows to **Act**. Each of the three skill areas is made up of three sub-skills. While all nine skills are ultimately necessary for organization success, research shows that there is no one pervasive ideal skill mix for every stage of organization evolution. Instead, the optimum mix of skills varies as the organization evolves from Concept, to Startup, to Credible, to Sustainable, to Mature.

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<sup>1</sup> “[The Conduct of Due Diligence on Leader Talent](#)”, by F. Vicino, Ph.D. & B. Green, Ph.D., [OD Practitioner](#), Journal of the National O.D. Network, vol. 32/No.2, 2000.

<sup>2</sup> “[Listening To Leaders: Feedback on 360-Degree Feedback One Year Later](#)”, B. Green, Ph.D., [Organization Development Journal](#), Global Organization Development Network, vol. 20/No.1, 2002.

Ideal top team **Know, Think, Act** skill mix varies by stage of organization evolution.



Adapted from *The Conduct of Due Diligence on Leader Talent* by F. Vicino, Ph.D. & B. Green, Ph.D., *OD Practitioner*, vol. 32/No.2, 2000

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As shown above, based on over 24,000 data points collected from studying successful organizations at every stage of maturity over decades, the ideal executive skill mix for the Concept phase of organization evolution is high in action skills (including execution) and high knowledge skills. Thinking skills are important too, but not as much as the other two skill sets. As the chart illustrates the relative importance of the three skill sets changes as the organization matures from Concept into Start-up, Credible, Sustainable, and Mature stages. Enlightened leaders of evolving ventures intentionally design top executive development and recruiting to achieve a composite skill mix that maps well to the ideal for their current and upcoming evolutionary phases.

This Phase 1 assessment reveals how each of Example Organization's executives scores in terms of the three skill sets and computes an aggregate for the team as a whole by averaging the scores.

The following two figures show the current mix of the Executive Team competencies at a summary level and in detail:

Executive Team				
	Depth	Score	Max	Ratio
Know	29	42		70%
Think	27	36		74%
Act	31	48		65%

FI Executive Team					
Skill	Depth	Score	Max	Ratio	
Know	Technology/Function	9	12		75%
	Industry	8	12		67%
	Organization	12	18		69%
Think	Analytic	12	15		80%
	Creativity/Innovation	6.333	9		70%
	Strategy	8.333	12		69%
Act	Planning	7.667	15		51%
	Communication/Influence	13	18		72%
	Bias for Action	10.33	15		69%

Example Organization is presently in the throes of evolving from the Startup to Credible stage of venture evolution according to the IntelliVen [Manage to Lead Framework; Grow Section](#). This means, for example, that the organization is learning to: plan; perform, track and report on performance relative to a plan; build a core leadership team driven to apply their diverse strengths to achieve targeted results; clarify roles and responsibilities; put in place incentive structures; and mature its systems of delivery, sales, and growth in order to scale.

From the illustration of the ideal skill mix by stage of organization evolution above, it is clear that **Example Organization's top executive team is underdeveloped in terms of planning, organization, communication, influence, and execution skills; or, in aggregate, Act skills. We therefore recommend work to develop and augment itself to secure more Act skills which are so important at this stage of Example Organization's evolution.**

# CEO Assessment and Growth Report

## Leadership Skills Inventory Assessment

Skill		Depth	Score	Max	Ratio
Know	Technology/Function	9	12		75%
	Industry	9	12		75%
	Organization	17	18		94%
Think	Analytic	12	15		80%
	Creativity/Innovation	6	9		67%
	Strategy	7	12		58%
Act	Planning	6	15		40%
	Communication/Influence	10	18		56%
	Bias for Action	10	15		67%

Note that CEO's highest rated scores are for 3 of the 9 driver competencies. Two of the 3 fall into the first of 3 generic competency categories, Role Understanding (or Knowledge) skills.

The highest rated competencies are:

- Role skill understanding (or Technical/Functional knowledge)
- Industry Understanding (knowledge one's own business and its 'fit' in the marketplace)
- Analytic Ability (which is included in the second generic competency of Organization Mindfulness or Thinking Skills)

In the Moderate score category CEO ranks High-Moderate in Enterprise Understanding, Innovation/Creativity, Strategic Skills, Influence/Communication, and Action Orientation.

CEO does not rate low in any of the 9 driver competencies.

The one low rating (Planning & Organization Skill) falls in the Moderate (mid-level) category. This may be sufficient given that CEO has other executive team members who score higher in this driver competency.

## Consolidated Stakeholder Assessment

I.	<p><b>What are this person's key strengths that are important to Example Organization and its clients?</b></p> <p>Unwavering eye for quality and insistence on quality work.</p> <p>Sets ambitious goals personally and the company, always focused on being the best at whatever we do, Interested doing new and challenging things, pays a lot of attention to details.</p> <p>Ability to sell</p> <p>A clear understanding of the company's capabilities and how that should shape engagements and the pursuit of new clients</p> <p>Resilient; able to bounce back from problem situations</p> <p>Has a vision for the firm. Equally internally facing and externally facing (clients/prospects).</p> <p>Works hard on the firm.</p> <p>Genuinely cares about the work our people do and their professional development, but also their personal development.</p> <p>Intellectually curious and open minded. Always willing to listen to new ideas.</p> <p>Approachable.</p> <p>Loves to take on new and interesting challenges. Excited about solving problems.</p> <p>Leadership</p> <p>Industry knowledge and connections</p> <p>Business Development</p> <p>Technical leadership:</p> <p>Client management</p> <p>Credibility with both clients and prospects</p> <p>Well respected and liked by staff and clients</p>
II.	<p><b>What has this person contributed over the course of this performance period? Give specific accomplishments.</b></p>

	<p>Began to organize the company for growth beyond our 50 person plateau. Work was the problem. We did not have a focus on people's growth past the senior analyst level.</p> <p>Taken action to grow</p> <p>Increased communication with the leadership team and across the company regarding focused goals and growth strategy for our commercial business has helped others better understand focus and where they can best contribute.</p> <p>Greater engagement with the business, resulting in a sharper focus for the company</p> <p>Executed and implemented Service Excellence and Business Development making those two initiatives top priority.</p> <p>CEO Newsletter – improved communication across the firm</p> <p>Coaching and guidance to team</p> <p>Steadied the business in the face of first full year of major change at the top</p> <p>Continued to establish greater attention to performance and results throughout the organization</p> <p>Helped begin to focus on leveraging expertise (thought leadership, repeatable solutions/capabilities) and expanding its reach into other areas of Federal</p> <p>Maintained and developed strong connections with clients, potential clients, and partners</p> <p>Contributing opinions in meetings/one-on-ones.</p> <p>Held the firm together and kept us going another year.</p>
III.	<p><b>Where has this person evidenced growth during this performance period? Give specific examples.</b></p>
	<p>Has begun to listen to others within the firm and acting upon those suggestions in a positive manner.</p> <p>Identified mistakes made, admitted them, and changed course. E.g., that 2014 goals were too big, too wide, and not focused enough.</p> <p>More focused now on setting top-level goals and communicating those goals and the direction in which to grow the company more effectively.</p> <p>Communication with employees has improved; communicates more often and is now better at communicating firm priorities in a consolidated message.</p> <p>A new willingness to tackle people problems</p>

	<p>Has exceeded my expectations over the last 6 months. There have been multiple times in meetings with others where the CEO was put on the spot to answer/respond to difficult/controversial comments/questions. Specifically, there was a conversation at the manager offsite which I thought unfairly targeted and bullied the CEO who handled the situation very well – without seeming to get upset or respond out of emotion. I probably would have had a hard time not snapping back.</p> <p>In the past, has had a workaholic attitude, and didn't understand when others weren't the same. This seems to have died down a bit.</p> <p>Starting to become much more aware of how words and actions impact others</p> <p>Has gotten better at being careful of facial expressions and body language</p> <p>Grew understanding of developing and managing managers</p>
<b>IV.</b>	<b>What should this person concentrate on to improve during the next performance period?</b>
	<p><b>Get clearer about what you want from whom, tell them, and help them decide they want the same and then help them be successful in what you want from them...starting with CMO, COO, and the market managers.</b></p> <p><b>Delegate.</b> But in so doing also:</p> <ul style="list-style-type: none"> <li>• Be sure that those you delegate to understand what you want from them, want to do it, and think they can be successful doing it.</li> <li>• Ensure compensation incentives are consistent with goals to be achieved. Simplify compensation structure.</li> <li>• Give guidance, feedback, and help to increase the odds each will succeed.</li> <li>• Understand that some employees are not ever going to sell, even though you want them to sell. There have been conversations between CEO and Managers in the past that have gone as follows: <ul style="list-style-type: none"> <li>○ CEO: We need to grow our business at X client. How are you planning to do that?</li> <li>○ Manager: As I've mentioned before, I'm really not that interested in sales and business development.</li> <li>○ CEO: OK. Can you send me your plan to sell at X client by tomorrow morning? And what else are you doing to develop business? You should go talk to person Y at the client to see if they need anything. Make sure to do it this week and report back to me.</li> </ul> </li> </ul> <p>See <a href="#"><u>this post</u></a> which relates to the points above.</p>

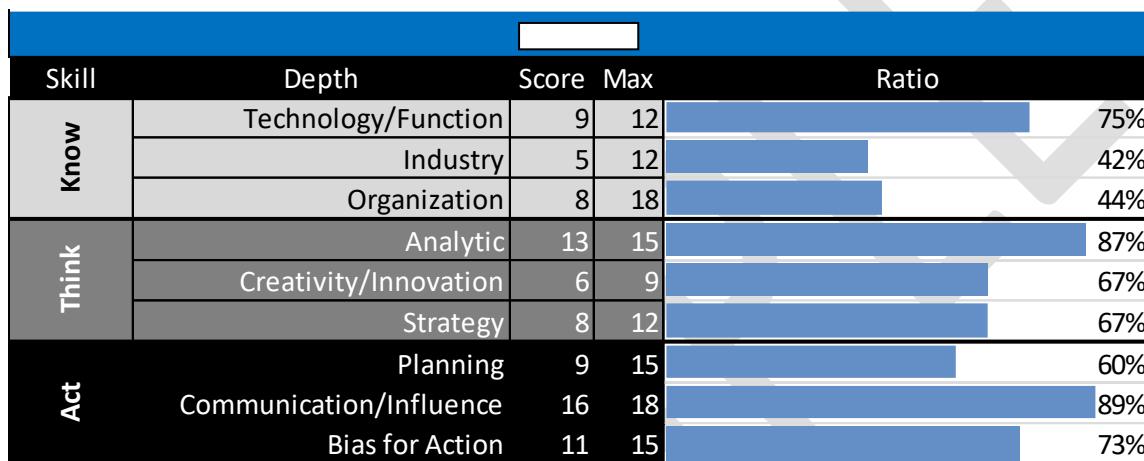
	<p>Be genuinely open to input and ideas of others. Work harder to get in their shoes before shutting down and demanding/expecting them to see and do things your way.</p> <p>Don't be the first to talk; make space for others, especially in meetings; Be more facilitative during meetings, less dominating</p> <p>Spend much more time working <b>ON</b> the business vs. <b>IN</b> the business. E.g.,</p> <ul style="list-style-type: none"> <li>○ Spend more time thinking about, planning for, and operating in quarterly board meetings.</li> <li>○ Consider bringing in a part-time senior experienced professional operations executive to help you, COO and CMO and the Market Managers set up the operating platform for growth. [You could probably figure it out for yourself with enough time but why take so long, go so slow, and run the risk. Bring in someone who can help you get it right now and get going.]</li> <li>○ Opportunities for Training <ul style="list-style-type: none"> <li>• Presentation skills training for large groups (e.g., Andy Gillman)</li> <li>• Emotional Intelligence (e.g., Daniel Goleman's work)</li> <li>• Team Building (e.g., Drexler, Sibbet)</li> <li>• One-on-One executive coaching (e.g., Dr. Green)</li> <li>• Conflict resolution/Fierce conversations</li> <li>• Situational leadership (Blanchard)</li> <li>• Manage to Lead (PeterD)</li> <li>• Giving and getting feedback (Seashore)</li> <li>• Human interaction lab to increase awareness of how messages are delivered (less abrupt); be explicit with instructions and expectations; better management of self and sense of self as a resource (NTL)</li> </ul> </li> </ul>
V.	<p>Please list specific goals and career objectives for this person to work toward during the next performance period.</p>
	<p>Be the CEO – set direction and get others to follow</p> <p>Get a CEO coach</p> <p>Join a CEO peer group (consider <a href="#">NetCito</a>)</p> <p>Talk even more about mission, vision, WIG/priorities and how they fit in with what people are working on</p>

	Work yourself out of team lead/key person roles at clients
	Delegate rather than doing yourself

## COO Assessment and Growth Report

### Leadership Skills Inventory Assessment

COO's skill set mix is shown below. Note that COO's two lowest ratings fall into the Moderate Rated scale of Know (Industry Understanding and Enterprise or Organization Understanding). There are no low ranking driver competencies to report.



COO's highest rated competencies are:

- Role skill understanding (or Technical/Functional knowledge)
- Analytic Ability (which is included in the second generic competency of Organization Mindfulness or Thinking Skills)
- Innovation/Creativity
- Strategic Ability
- Planning/Organizing
- Influence and Communication
- Action Orientation

The one low rating (Planning & Organization Skill) falls in the lower range of Moderate rankings. This is not of significant concern as it is a growth area for which COO is making progress.

## Consolidated Stakeholder Assessment

I.	<p><b>What are this person's key strengths that are important to Example Firm and its clients?</b></p> <p>Operations focused with a strategic mindset</p> <p>Respected, trusted</p> <p>Optimistic</p> <p>Selfless, mindful of decisions, and impacts on people &amp; organization dynamics.</p> <p>On board 150%</p> <p>Highly organized, systematic, diligent, thorough; great at implementation and follow-through,</p> <p>Facilitates growth. Open to input; eager to learn and grow; inquisitive</p> <p>Interpersonal skills, easy to talk to; positive; congenial (incredibly nice), sensitive, high feeling; high emotional intelligence</p> <p>Cares about every person individually and the organization as a whole; dedicated to staff, understanding staff concerns, and responding to them.</p> <p>Good relationships with key staff, allowing difficult conversations</p> <p>Managing HR and, especially, recruiting</p> <p>The glue that holds us all together. The single most important person at the firm:</p> <ul style="list-style-type: none"><li>• Integrity. Has to have difficult conversations with people at the firm and doesn't shy away from them. Always offers to do the hardest task.</li><li>• Organized &amp; Diligent. Gets so many emails, so many questions, and is asked to do so many things. Regardless, makes sure to address each and every one of these requests with the same amount of attention and sincerity. Has a systematic way of dealing with this high volume of requests.</li><li>• Thoughtful. Always has an answer to any question or issue anyone has, and gives extremely thoughtful advice. Makes methodical decisions, and can always strongly support any decision made. Is in tune with what's going on at the firm, and strives to be even more so.</li><li>• Selfless. Puts the firm and everyone at the firm first. Always helping others grow, willing to help get people the resources they need to be successful, and make them feel important.</li><li>• Does the right things for the right reason in the right way.</li></ul>
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II.	<p><b>What has this person contributed over the course of this performance period? Give specific accomplishments.</b></p>
	<p>Recruiting:</p> <ul style="list-style-type: none"> <li>• Keeps the recruiting pipeline filled</li> <li>• Hires the people the company needs; e.g., found BU leader</li> </ul> <p>Spearheaded positive changes to manager compensation.</p> <p>Key to getting the management team to work together more effectively by helping to facilitate conversations, provide training and tools for the team to work more effectively together, and leading a strong team to support managers and associates in client delivery.</p> <p>Answered everyone's questions</p> <p>Been a leader and a role model</p> <p>Helped others accomplish their goals; e.g., revamping the Website, automating the firm financial monthly process, improving the Performance Management Framework</p> <p>Began to organize the company for growth beyond our current plateau.</p> <p>Maintained Firm Budget</p> <p>Improved the Leadership meeting structure.</p> <p>Rolled out changes to the Management Compensation Structure</p> <p>Kept the bench lean and placed people on the right projects</p> <p>Facilitated communication across the firm</p> <p>Implemented Sales CRM system, process, and guidelines</p> <p>Helped establish greater attention to performance goals and results</p> <p>Makes the trains run, so that others can focus on delivering and selling</p> <p>Found new office</p>
III.	<p><b>Where has this person evidenced growth during this performance period? Give specific examples.</b></p>
	<p>Stepped up to be more of a partner to CEO. Learned to influence in a positive manner. Pushed back constructively.</p> <p>More assertive and proactive.</p> <p>Saw a need and stepped up to grow and fill that need.</p> <p>Setting up for growth.</p>

	<p>Strengthened relationships with client service personnel.</p> <p>Established self as a visibly critical leader through communication, taking ownership, making decisions including bigger decisions.</p> <p>Drove changes in planning process, scaling capabilities to support the company's growth plans, and effectively identifying tools and training to help managers and associates expand their skills and more fully reach their potential.</p> <p>Greater awareness of HR needs and how they are changing</p> <p>Increased thoughtfulness about the company's comp structure and its impact on the staff and on hiring</p> <p>Putting together a document to describe compensation so people can get over the fact that they think it's a black box.</p> <p>Taken on higher levels of COO responsibility</p> <p>Grew in sales/business development leadership</p> <p>Grew understanding of the business.</p>
IV.	<p><b>What should this person concentrate on to improve during the next performance period?</b></p> <p><b>Stop obsessing/agonizing about it. Go even farther to being CEO's partner. If you go too far (and I don't think you can!)</b></p> <p><b>Help CEO bring on and develop the market leaders, and turn them all into a high-functioning team.</b></p> <p><b>Make financial reporting less painful and more accurate</b> by finding an effective way to delegate it. It is not a strength. Find an analyst inside or on a contract basis to do it.</p> <p><b>Better align resources with projects.</b> Make it easier for managers to secure appropriate resources. Improve communication within the management team on who needs resources and what resources are available.</p> <p><b>Learn to say "no" in a way people can hear.</b> Be more direct in answering questions. Sometimes offers to consider things that are unlikely, which can lead to misplaced hope.</p> <p><b>Opportunities for Training</b></p> <ul style="list-style-type: none"> <li>○ Executive presence</li> <li>○ Core business functions sales/management</li> <li>○ Supervisory skills</li> </ul>

	<ul style="list-style-type: none"> <li>○ Interpersonal communications (assertive listening, appreciative inquiry)</li> <li>○ Situational leadership (Blanchard)</li> <li>○ One on one coaching to boost perception of self and to increase self-confidence</li> <li>○ Find opportunities to build knowledge of core business.</li> </ul>
V.	<p><b>Please list specific goals and career objectives for this person to work toward during the next performance period.</b></p>
	<ul style="list-style-type: none"> <li>● Get recruiting process and structure ready for increased hiring</li> <li>● Understand operational challenges of growing to the next stage of maturity; find and work with a mentor</li> <li>● Develop and implement a longer-term plan for operational infrastructure (systems, processes, people) that will support our 3-5 year growth targets</li> <li>● More professional reporting to board; more consistent and proactive reporting to CEO and Exec team.</li> <li>● Document how resources are to be requested, assigned, transferred, etc. across assignments.</li> <li>● Manage corp budget carefully, including bench/timecodes.</li> </ul>

# Director of Business Development Assessment and Growth Report

## Leadership Skills Inventory Assessment

CMO's skill set mix is shown below. Note that CMO's three highest rated scores are in each of the three skill set categories, Know and Think.

Skill		Depth	Score	Max	Ratio
Know	Technology/Function		9	12	75%
	Industry		10	12	83%
	Organization		12	18	67%
Think	Analytic		11	15	73%
	Creativity/Innovation		7	9	78%
	Strategy		10	12	83%
Act	Planning		8	15	53%
	Communication/Influence		13	18	72%
	Bias for Action		10	15	67%

The highest rated competencies are:

- Role understanding (or Technical/Functional knowledge), 9 out of 12 points.
- Industry Understanding (knowledge of one's own business and its 'fit' in the marketplace), 10 of 12 points.
- Enterprise (or organization) understanding, 12 of 18 points.
- Analytic Ability (which is included in the second generic competency of Organization Mindfulness or Thinking Skills), 11 of 15 points.
- Innovation/Creativity, 7 of 9 points.
- Strategy skills, 10 of 12 points.
- Influence/Communication skills, 13 of 18 points.

In the Moderate score category CMO ranks High-Moderate in Planning & Organization skills, 8 of 15 points, and Action orientation, 10 of 15 points.

CMO does not rate low in any of the 9 driver competencies.

The one low rating (Planning & Organization Skill) falls in the Moderate (mid-level) category. This low ranking is of minimal concern at present.

## Consolidated Stakeholder Assessment

I.	<b>What are this person's key strengths that are important?</b>
	<ul style="list-style-type: none"><li>• Sales<ul style="list-style-type: none"><li>◦ Dedication to sales process. Connects well with clients and potential clients leading to sales. Good at quickly gaining clients or potential clients trust and figuring out ways to expand work with them in a way that benefits both our clients and expands opportunities for our associates.</li><li>◦ Builds relationships, networks; leverage both to the advantage</li></ul></li><li>• Delivery<ul style="list-style-type: none"><li>◦ Set-up and leadership of client projects and teams</li><li>◦ Good technical problem solving</li></ul></li><li>• Leadership<ul style="list-style-type: none"><li>◦ Sees the big picture. Has strong vision for employees</li><li>◦ Builds tremendous loyalty; projects an image that people want to follow. Strong mentor for many people in the firm. Particularly good at developing others to be effective leaders and learn to identify and take advantage of opportunities to grow the business. Regularly pushes people to move outside their comfort zones and achieve more than they thought possible. Makes people believe they can do more; gives people opportunities to do more and to build their own things</li><li>◦ Active speaker, presenter. Motivates our company whenever in front of the group</li></ul></li></ul>
II.	<b>What has this person contributed over the course of this performance period? Give specific accomplishments.</b> <ul style="list-style-type: none"><li>• Developed idea for Microsoft Office Automation Solution.</li><li>• Expanded business at clients and increased our visibility at industry events/conferences. Improved marketing by developing a strong slide deck for the conference and future conferences. Contributed to and led proposal efforts.</li><li>• Helped facilitate more involvement from associates in business development as well as coming up with a crisper, clearer message to clients that both encapsulates offerings and gives us the flexibility to easily tailor conversations about our experience to their needs.</li><li>• Mentored others to extend and expand client work with good project setup, management, rates, structure.</li><li>• Managed of existing revenue across clients.</li></ul>

	<ul style="list-style-type: none"> <li>Developed and taught sales training.</li> <li>Achieved Step 1 sales goal with new business (barely)</li> <li>Helped to brand FI's value proposition and effectively communicate our offerings both externally and across the company.</li> <li>Built teams.</li> <li>Submitted quality proposals</li> <li>Allowed me to grow on my project by giving me autonomy to make decisions. Yet, when needed, was also provided support by finding a second resource to help me for a short sprint.</li> <li>Given us new opportunities at new and old clients</li> <li>Enabled employees to use their strengths</li> <li>Has been able to grow current clients even as employees have left projects</li> </ul>
III.	<b>Where has this person evidenced growth during this performance period? Give specific examples.</b>
	<ul style="list-style-type: none"> <li>Sales pitch. Has a confident, well-rehearsed sales pitch that comes across effortlessly.</li> <li>Works effectively across the company to a greater extent to develop teams and leaders that will allow us to grow beyond our current size.</li> <li>Getting more versed in building web based systems, in submitting a highly technical proposal.</li> <li>Stepped back, give others more opportunity</li> <li>Was positive, even during challenging situations such as when key employees have left. Maintained positivity and vision. Kept us moving forward.</li> </ul>
IV.	<b>What should this person concentrate on to improve during the next performance period?</b>
	<ul style="list-style-type: none"> <li><b>Prioritize how time is spent.</b> Do a few, most important, things as they come up and as agreed upon by the leadership team. Plan-Do-Review accordingly.</li> <li><b>A master at getting done what needs doing.</b> Should do this more willingly and gracefully and in the best interests of the entire organization as determined by its leadership. Gets it in mind from time to time to be at odds with the CEO. The CEO is in charge. The CEO's job is to decide what each resource should do. The Head of BD needs to help the CEO decide, in face of all the facts, who should do what and to make the best decision possible. Then the Head of BD needs to fire out full force on</li> </ul>

	<p>whatever the CEO has asked. Must not second-guess, back talk, or otherwise undermine or underperform for convenience, ego, or whatever.</p> <ul style="list-style-type: none"> <li>• <b>Go overboard in being a team player at the top.</b> Lean into the discomfort and engage in open, honest conversations with the CEO and COO then work with them to consider alternatives and take the best course. It is not an option to behave or to talk as if the option is to hold the organization hostage. As a key member of the top team get aligned with what CEO and COO want to accomplish and get on board 100%.</li> <li>• <b>Be a key part of communicating the firm's messages to employees</b></li> <li>• <b>Don't rush to judgment</b></li> <li>• <b>Skill development opportunities:</b> <ul style="list-style-type: none"> <li>○ Emotional Intelligence (Goleman)</li> <li>○ Be a better listener</li> <li>○ Presentation skills training for large groups</li> <li>○ Better control emotions/word use while under stress</li> <li>○ Strengthen mission clarity with junior staff members</li> <li>○ Following a leader; getting on board with CEO decisions; better collaborate with CEO and COO</li> <li>○ One-on-one executive coaching</li> </ul> </li> </ul>
V.	<p><b>Please list specific goals and career objectives for this person to work toward during the next performance period.</b></p>
	<p>Do what the leadership team asks you to do in order to achieve corporate goals. Help identify and groom next generation of leaders</p>

## Appendix

### Peer Input Consolidation and Review Methodology

How an Executive Performance Assessment Process helped a COO become a CEO.

October 29, 2014



Leaders of fast growing, early stage organizations operate at such a fast pace that **often the last thing there is time to do is assess each member of the top team's performance** to determine how to prepare them for the next stage of evolution.

Most team members know each other pretty well. They have a good idea what each other is good at, has contributed, how they have grown, and what they should focus on next for success.

However, **team members rarely have the time, energy, training, or nerve to share what they know in a forthright, supportive conversation** with one another.

Most early stage leaders can learn a great deal that will help improve individual and team performance by unlocking the **JoHari Window** (click the figure above for further explanation) which keeps us in the dark about things others know about us that, if we knew them, would lead to improved performance.

For example, it came to light during a professionally facilitated Executive Performance Assessment Process that the COO of a \$15M, high-performance, and fast growing software firm made those reporting to him feel discounted when he turned to his phone during weekly one-on-one sessions. The team reviewed collected data and decided to let him know **his behavior was off-putting and disempowering**.

The COO was surprised by the feedback but made a commitment to behave differently. He asked for their assistance to help him change. All were supportive and even chuckled when he placed a sign on his desk during one-on-one sessions that said:

***"Tell Me If I Am Being Disrespectful!"***

The feedback worked in that his behavior changed. Soon the COO was promoted to CEO with the respect and admiration of his entire team now a \$50M enterprise and heading to well over \$100M soon!

A successful Performance Assessment Process collects input from each executive on the others to determine what each:

- Is good at
- Has contributed
- Has done to grow
- Should focus on next

Input is consolidated, peer-reviewed, and fine-tuned to crystallize the most important messages for each team member.

The best practice is for top teams to implement, internalize, and institutionalize an approach to the essential performance conversations in a way that is straightforward, easy, and routine.

The ideal approach guarantees that the team helps each member individually, and the team as a whole, achieve their full potential to perform and grow. The result is increased likelihood of successful transition to the next stage of organization evolution.



The form includes fields for 'Employee Name', 'Supervisor Name', and 'Employee Performance'. It contains a detailed set of questions for each executive, such as:

- What are the strengths that are responsible for your success?
- What have been your main challenges in this past performance period? (List specific examples)
- What are the most important growth opportunities in your current role? (List specific examples)
- How would this person contribute to improve the future performance of our organization?

The IntelliVen Executive Assessment Process (data collection instrument at left), in addition, recognizes that **a different mix of competencies is key to organization success in each stage of organization evolution** ([Concept](#), [Start up](#), [Credible](#), [Sustainable](#), and [Mature](#)). In each stage it is important for leaders to recognize **how, who, and when an executive should be developed or a new executive brought on board**.

Consequently, **the ideal assessment process evolves by stage** of evolution to help the top team identify holes so that they can decide to either groom or hire talent to fill upcoming needs.

For example, **in a Start-up, executive skill in risk taking, execution, cash generation (i.e. sales and/or fund raising), and domain expertise are paramount**. Strategic product management, operational excellence, and financial acumen are also important but not the same degree as execution competencies.

**In the face of upcoming organization growth, the relative importance of key competencies changes to address what comes with organization maturity.**

There is no perfect executive leader and no perfect executive team for all stages of evolution. However, **a CEO and his/her [Core Leadership Team](#) can collectively achieve the needed**

**combination of competency to increase the likelihood that their organization will succeed in the current stage of organization maturity.**

IntelliVen helps organization leaders and their top teams fulfill their potential to perform and grow by implementing an Executive Assessment Process that **efficiently guides fast moving, growing, early stage organizations to develop each team member, and of the top team as a whole, according to the venture's evolutionary stage.**

Reply to this post in confidence with your contact information to explore further how your organization can benefit from implementing an Executive Assessment Process.

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[Follow this link for more on the JoHari Window and its cousin the Zucchini Connection.](#)