

# MANAGEMENT EFFECTIVENESS



FEEDBACK REPORT

**ActionCOACH**  
business coaching

Sample Report  
7/29/2010



# INTRODUCTION

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This Management Effectiveness Feedback Report consists of six components, which are described below.

## **1. Overall Summary**

The summary results chart provides a quick visual representation of your scores in the twelve competencies that make up the Management Effectiveness profile. The areas to concentrate on are those scores above 3.5 (strong) and below 2.75 (need further development). Please note that these competency scores are averages; individual question scores can be viewed by clicking on the individual competency link.

## **2. Category Descriptions**

There are three sections for each of the twelve competencies. The first of these three sections explains the competency, lists average scores, and then provides high and low score interpretation notes. The second section provides a graphical representation of individual question scores. The third section provides broadly-based improvement actions for those individuals wanting to develop their competencies.

## **3. 10/10 Report**

The "10/10" Report page provides the raw scores for the 10 highest scoring questions and the 10 lowest-scoring questions out of the 84. It also identifies which competency each question is from.

## **4. Course and Reading Suggestions**

Development suggestions for the two lowest scoring competencies, including specific recommendations regarding training courses and books that will provide useful information on the topic are included.

## **5. Development Plan**

The development plan lists questions with the five lowest scores from the assessment and puts them into a one-page template. Individuals can use this template to record the specific actions they plan to take over the next twelve months based on the general guidance offered in their feedback report and the coaching tips.

## **6. Coaching Tips**

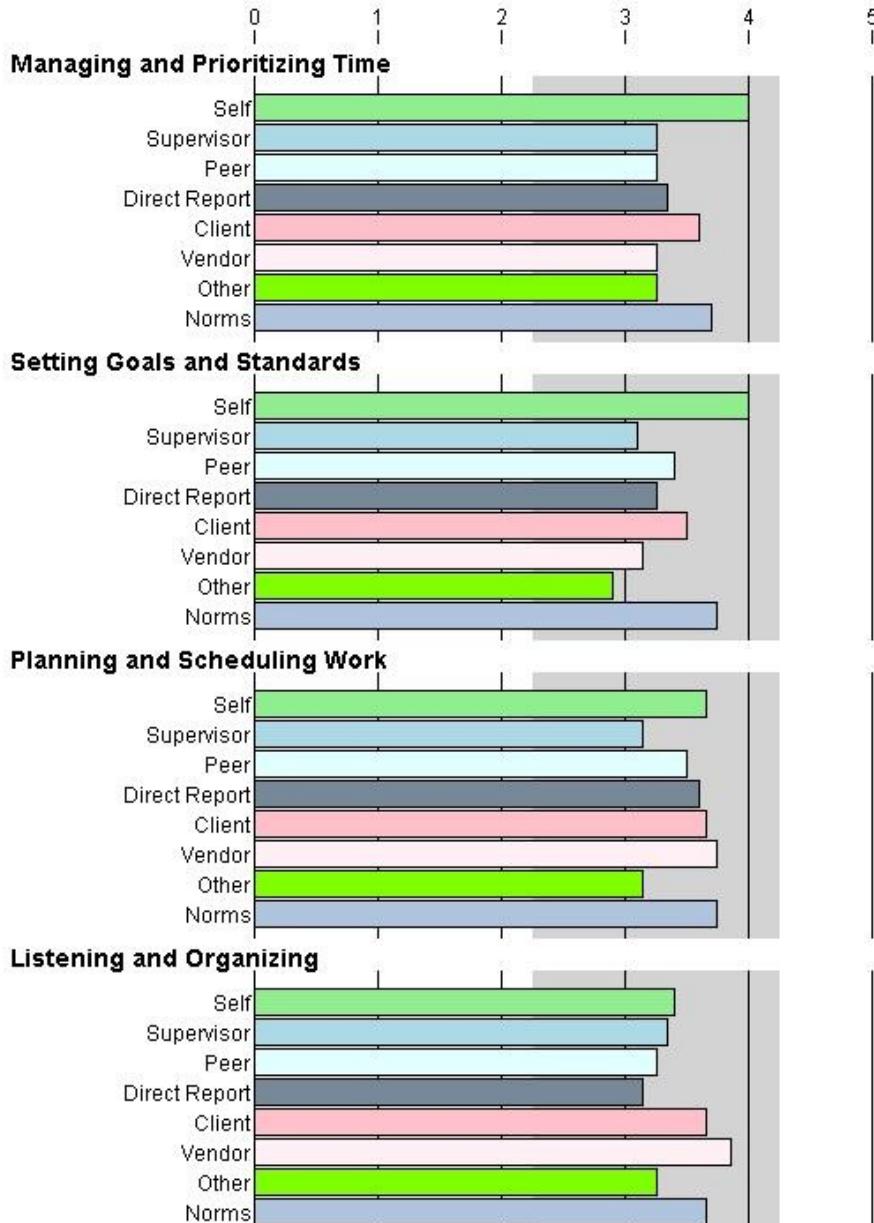
Detailed coaching tips for the five lowest-scoring questions are provided in this section. They offer specific advice on what individuals might do to improve their skills in this competency and learn new behaviors.

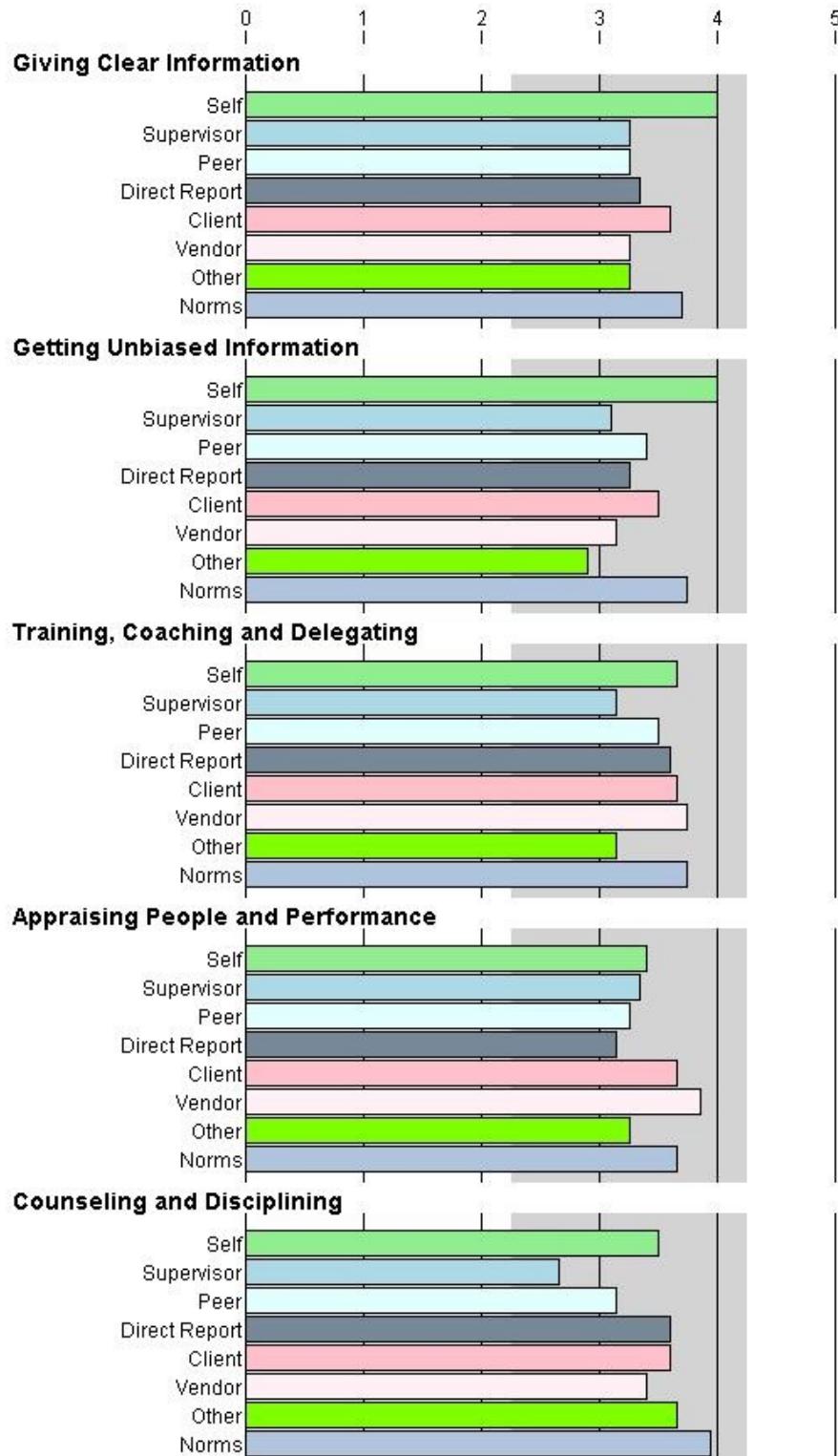
### **Note on 360 Degree Feedback**

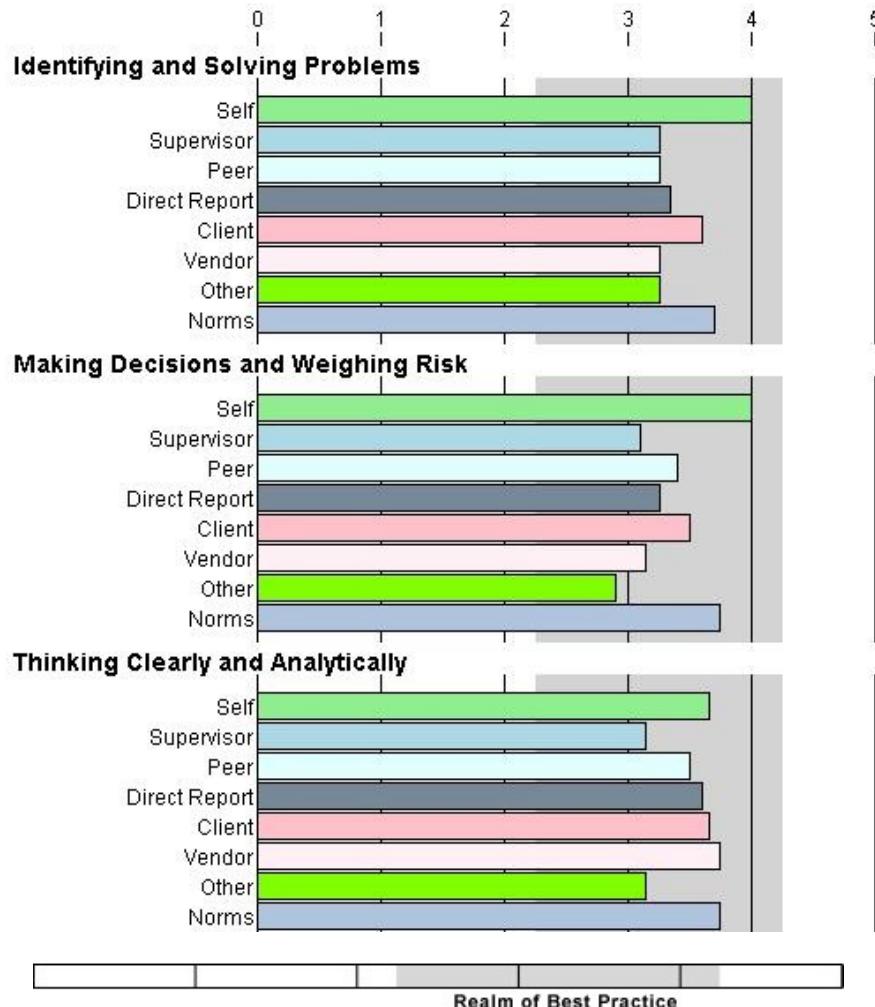
If you received feedback from your supervisor, direct reports or peers using this assessment, please note the following: Ratings responses from all persons who completed the assessment are averaged to produce the results in the 10/10 Report, Course and Reading Suggestions, Development Plan, and Coaching Tips.



# OVERALL SUMMARY







**Norm bars shown on all graphs in this report are the progressive average scores of all individuals rating themselves on this questionnaire.**



# MANAGING AND PRIORITIZING TIME

Managing and Prioritizing Time refers to an individual's ability to manage time, negotiate priorities, exercise self-discipline, control interruptions by shaping the behavior of others whose priorities are different, and become time-effective, rather than time-efficient.



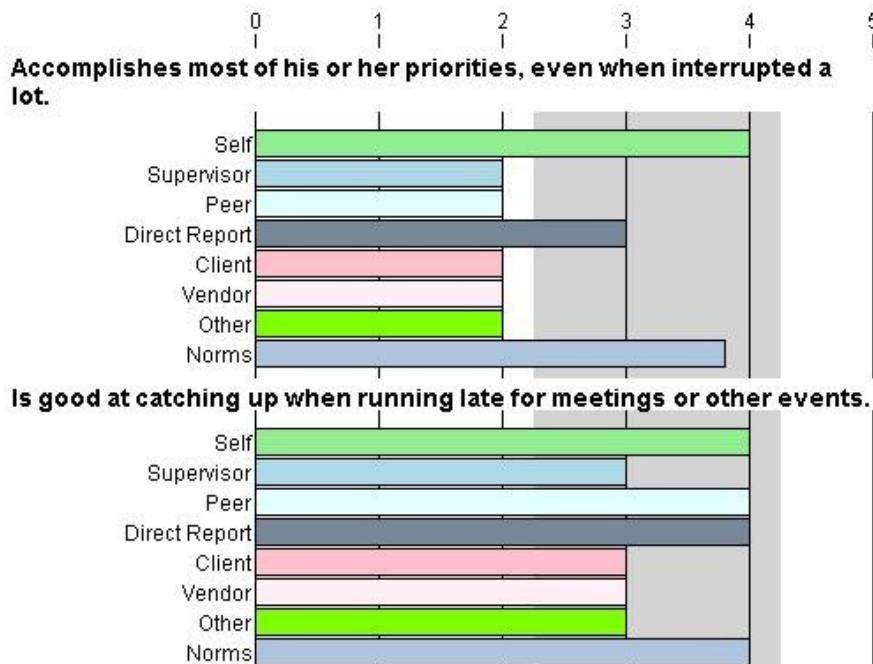
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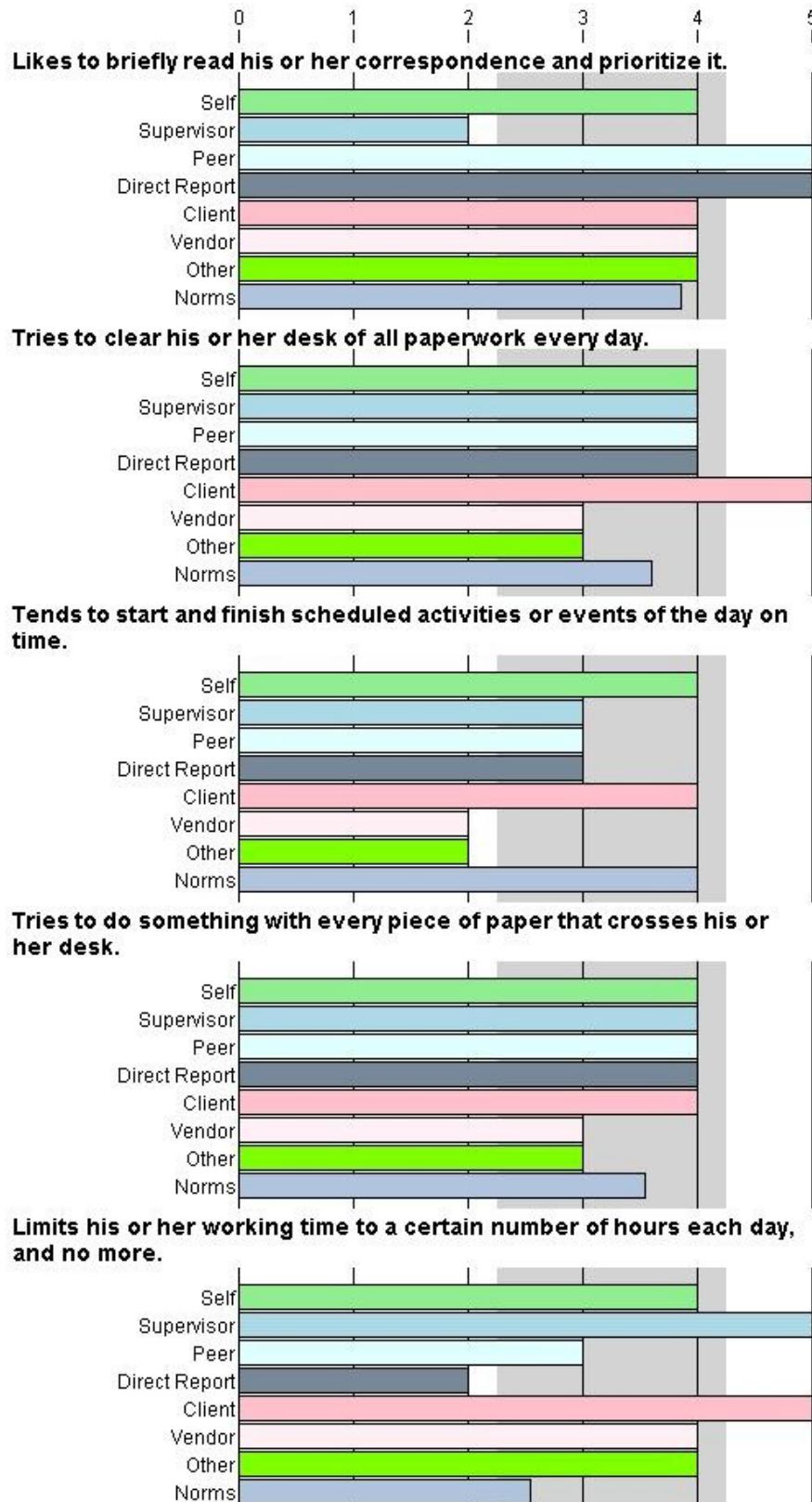
### LOW (less than 2.75)

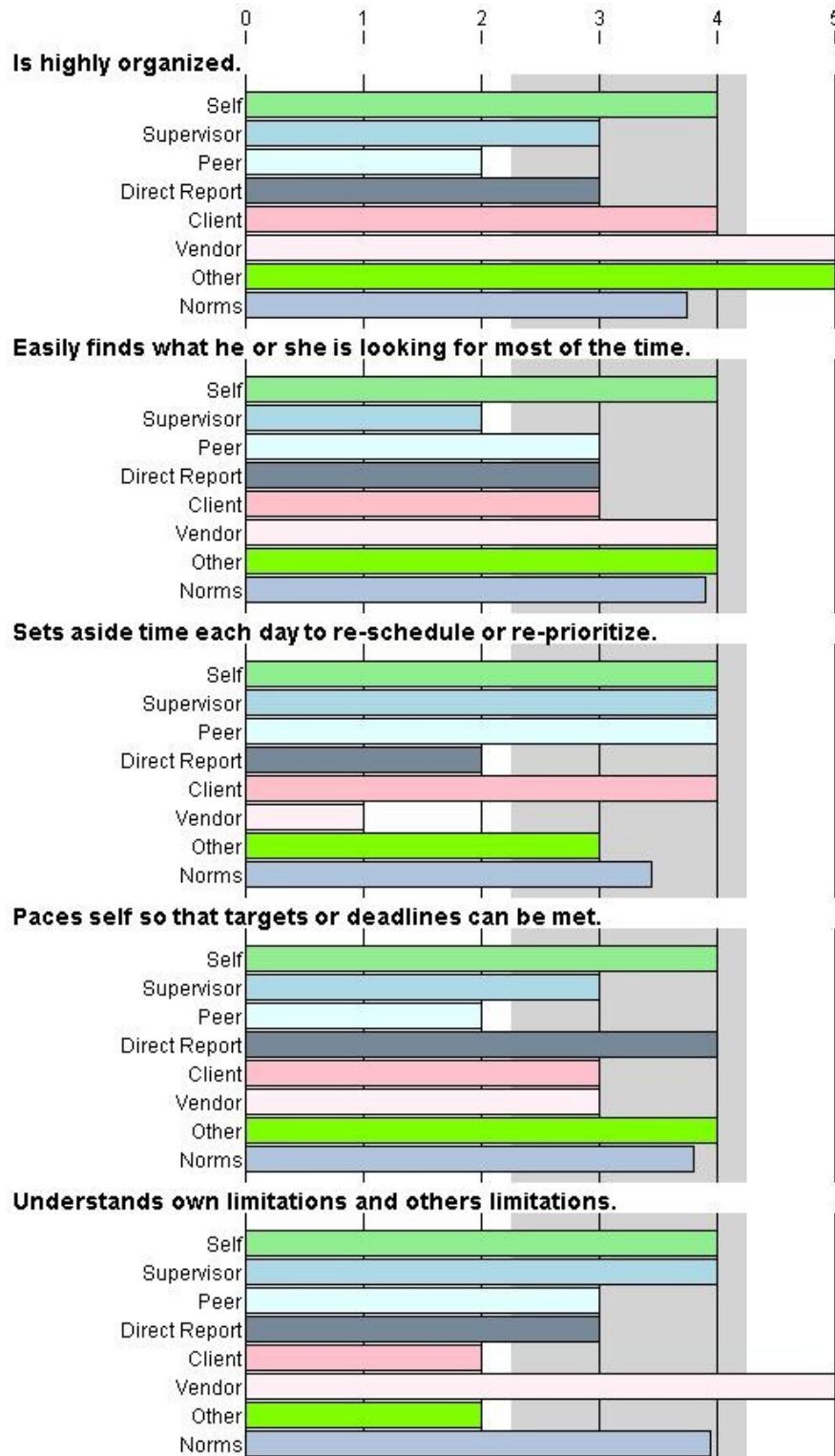
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you spend little or no time systematically organizing your workload or thinking about the next tasks before starting to work on them. A low scorer is likely to feel that he or she has more tasks than time to do them. As a result, this person tends to take on whatever comes next or seems to be the most urgent, failing to develop an organized approach beforehand that everyone will follow.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you are able to organize yourself and others in order to adjust to significant changes in your workload and re-prioritize them when necessary. A high scorer is likely to think of personal organization as a critical part of overall time management. High scorers understand the importance of thinking about the ongoing fluctuations in workload and changes in deadlines, and will reorganize themselves and others in order to achieve the best result.







**Managing and Prioritizing Time** refers to an individual's ability to manage time, negotiate priorities, exercise self-discipline, control interruptions by shaping the behavior of others whose priorities are different, and become time-effective, rather than time-efficient.

## **Recommendations for Overall Improvement**

Low scorers need to organize people, resources, goals, deadlines, and available time in order to achieve the right results, rather than float through each day adrift on a sea of changing priorities. Low scorers need to take charge of their personal priorities and learn that there is always an optimal sequence for tackling a series of future tasks or projects.

## **Ways to Strengthen or Improve Managing and Prioritizing Time**

- Make sure that all your planned and unplanned activities of the day and week are always scheduled and rescheduled as necessary.
- Set up a system to make sure that you can find things you need regularly, and think carefully about targets and deadlines for tasks or projects.
- Try not to make commitments until you have looked at your overall workload and worked out what is possible and how much reorganization will be necessary.
- Realistically recognize your own limitations and the limitations of others around you, (upon whom you will need to depend to meet your targets and deadlines).
- List the main interruptions that you are likely to encounter (i.e. phone calls, mail, drop-in visitors etc).
- Design "spare" time into your daily or weekly schedule to allow for some interruptions (but be clear about how you will manage them when they occur).
- Commit to managing casual interruptions by clearly telling people who drop in that you have important priorities that must be attended to first.



# SETTING GOALS AND STANDARDS

Setting Goals and Standards refers to an individual's ability to manage activities and projects using measurable goals and standards and working with others to set goals and standards to develop understanding and build commitment. This competency looks at one's ability to evaluate and prioritize goals, intentions, and action standards; eliminate barriers to the goal-setting process; evaluate goals against criteria and standards; and use goals to motivate.



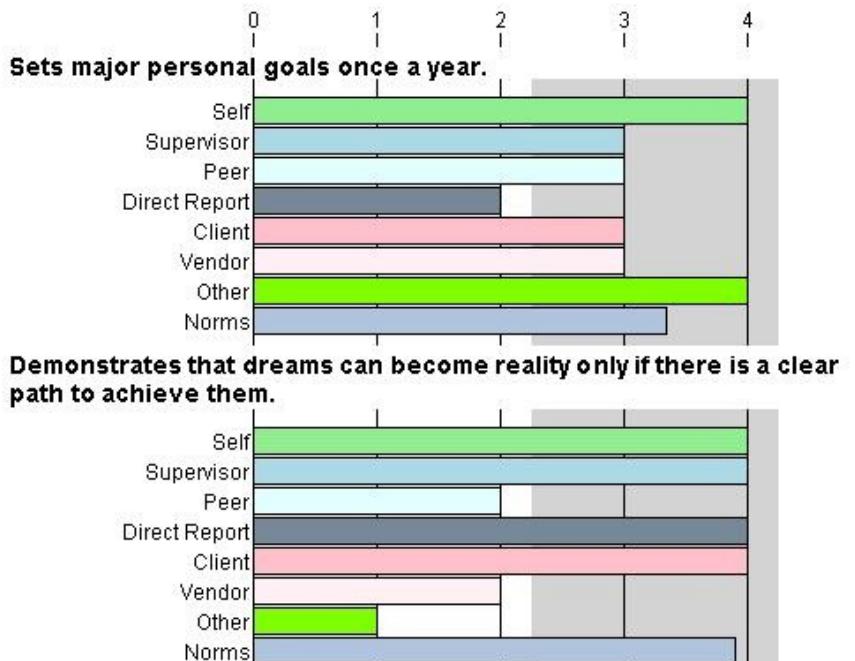
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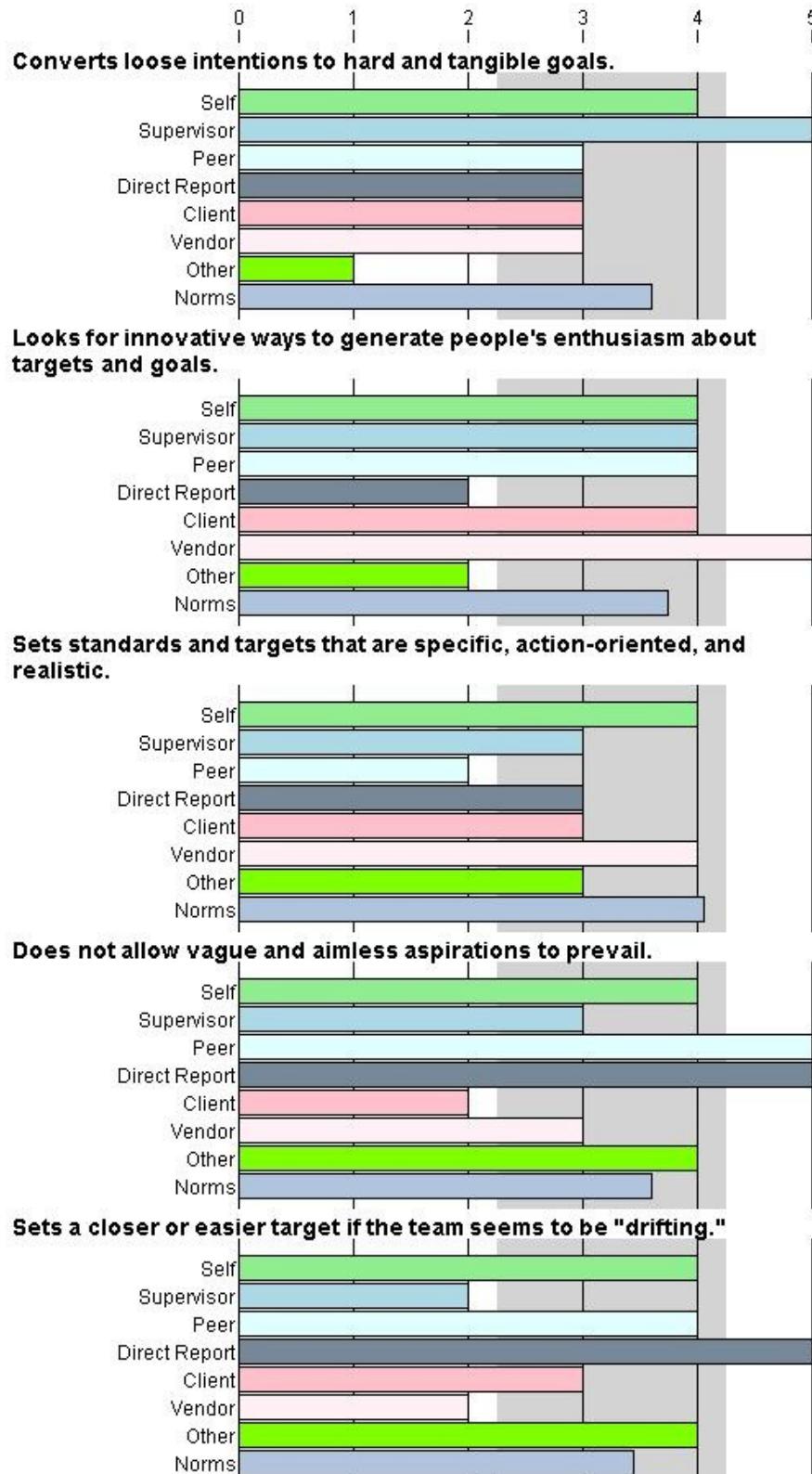
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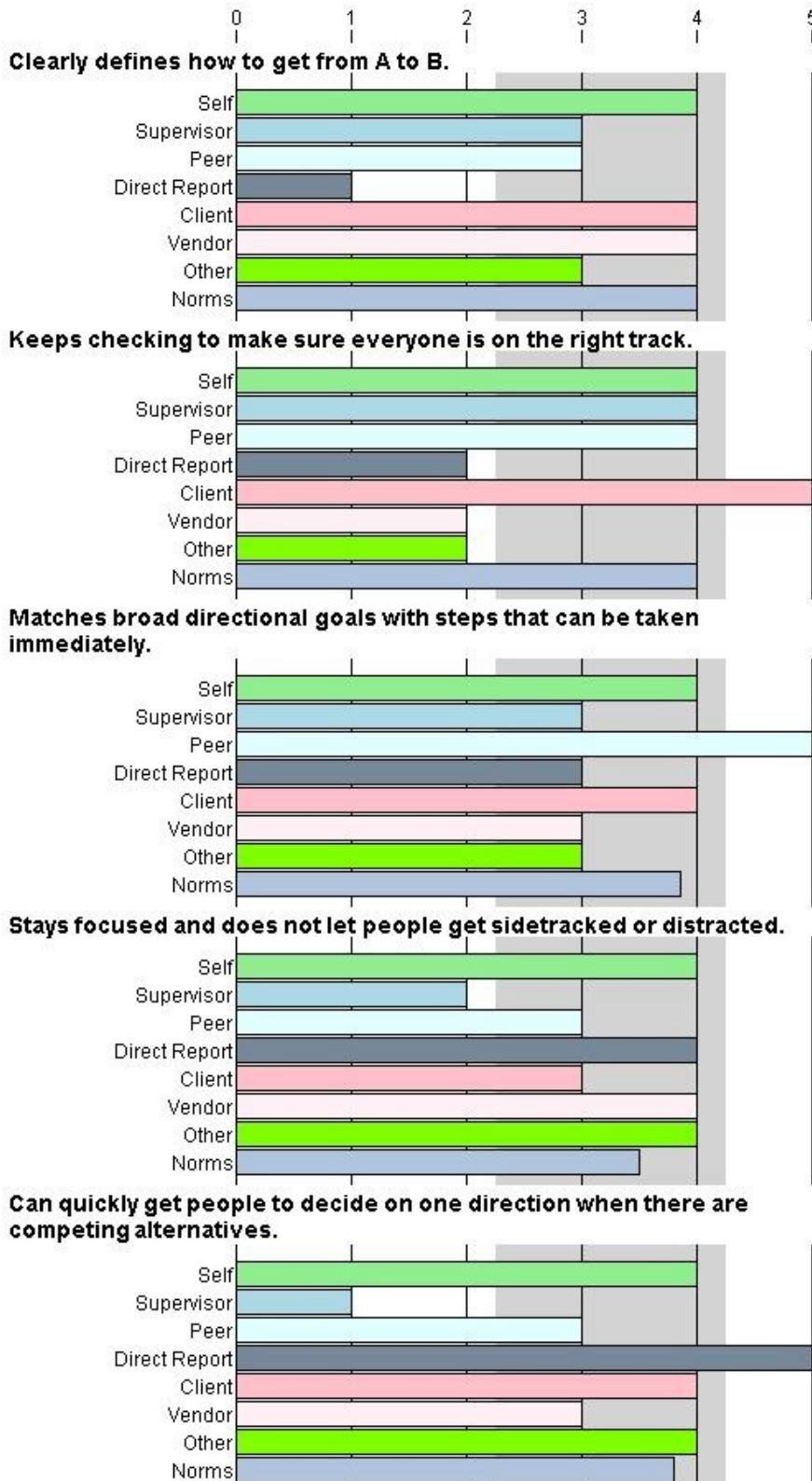
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you may have trouble identifying and prioritizing intentions, goals, and standards. Those with whom you work need to know which specific goals and standards you expect of them. You tend to focus more on activities than goals and are likely to give assignments without first collaborating with others to determine the goals and standards to be met. A low scorer is likely to find it difficult to translate idle thoughts or dreams about the future into specific directional steps that he or she and others can take in the short term. Low scorers tend to come across as indecisive, deliberately vague, and "aimless," and are prone to causing confusion in others because they identify more than one possible direction to take.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you are adept at converting broad, vague, or general intentions into goals; setting standards by which these should be achieved; and identifying the path to achieve them. A high scorer is likely to enjoy developing concrete and practical standards of performance and action plans that can be quickly and easily followed. This person can remain focused on one overall direction or course, and will see that people are not distracted or side-tracked unless absolutely necessary, in which case he or she will adjust the course and keep everybody informed.







**Setting Goals and Standards** refers to an individual's ability to manage activities and projects using measurable goals and standards and working with others to set goals and standards to develop understanding and build commitment. This competency looks at one's ability to evaluate and prioritize goals, intentions, and action standards; eliminate barriers to the goal-setting process; evaluate goals against criteria and standards; and use goals to motivate.

### **Recommendations for Overall Improvement**

Low scorers need to weigh alternative courses of action to achieve a particular result more effectively, as well as decide on the general direction and communicate it clearly, spelling out appropriate standards to achieve the result. Low scorers should try to get one or two other people to help them stay on track and consistently remind everyone of the goals and targets they are working toward.

### **Ways to Strengthen or Improve Setting Goals and Standards**

- Start setting clear goals for yourself, and use the experience to set broader targets that are concise and action-oriented.
- Make sure that others find targets clear and easy to follow.
- Keep reviewing your written goals to ensure that they remain realistic and that you stay on track.
- Use a structured process to evaluate the different courses of action that are open to you to achieve a particular goal or target.
- Ask your subordinates for feedback on how you use power, authority, and influence: Are you fair? Do you back down too quickly? Do you avoid conflict? Do you come across too strongly? Use the information you gather to make adjustments.
- Before presenting options or solutions, look for diverse opinions and share information in advance, so that those who need to "buy in" are not surprised.
- Hold regular progress review meetings so that everyone working on large-scale goals will develop better overall team spirit.



# PLANNING AND SCHEDULING WORK

Planning and Scheduling Work refers to an individual's ability to manage projects (one-time programs) and processes (ongoing workflow) by applying the major tools and techniques of management. This competency looks at one's ability to analyze complex tasks and break them into manageable units; select and manage resources appropriate to the tasks; use systems and techniques to plan and schedule work; and set checkpoints and controls for monitoring progress.



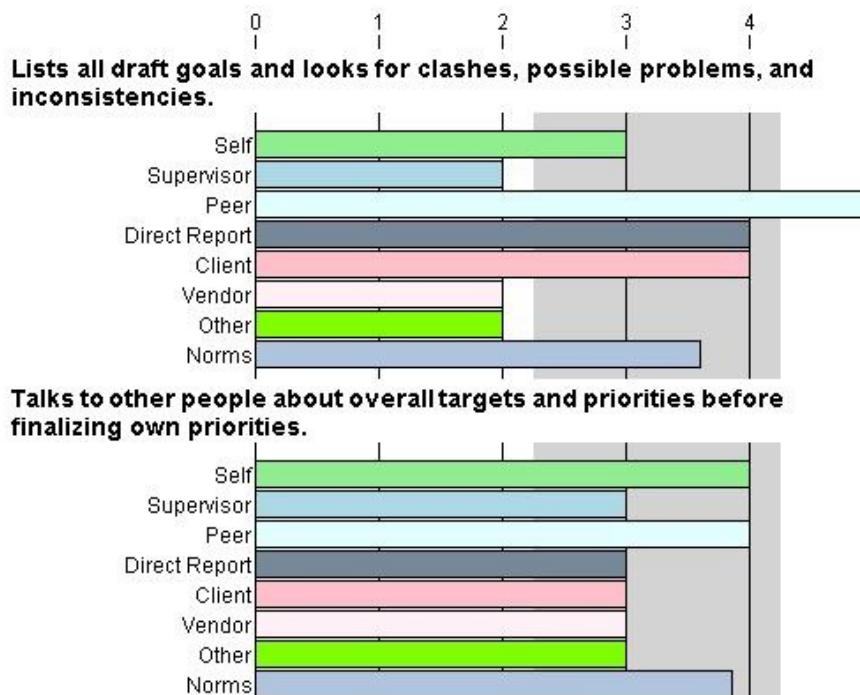
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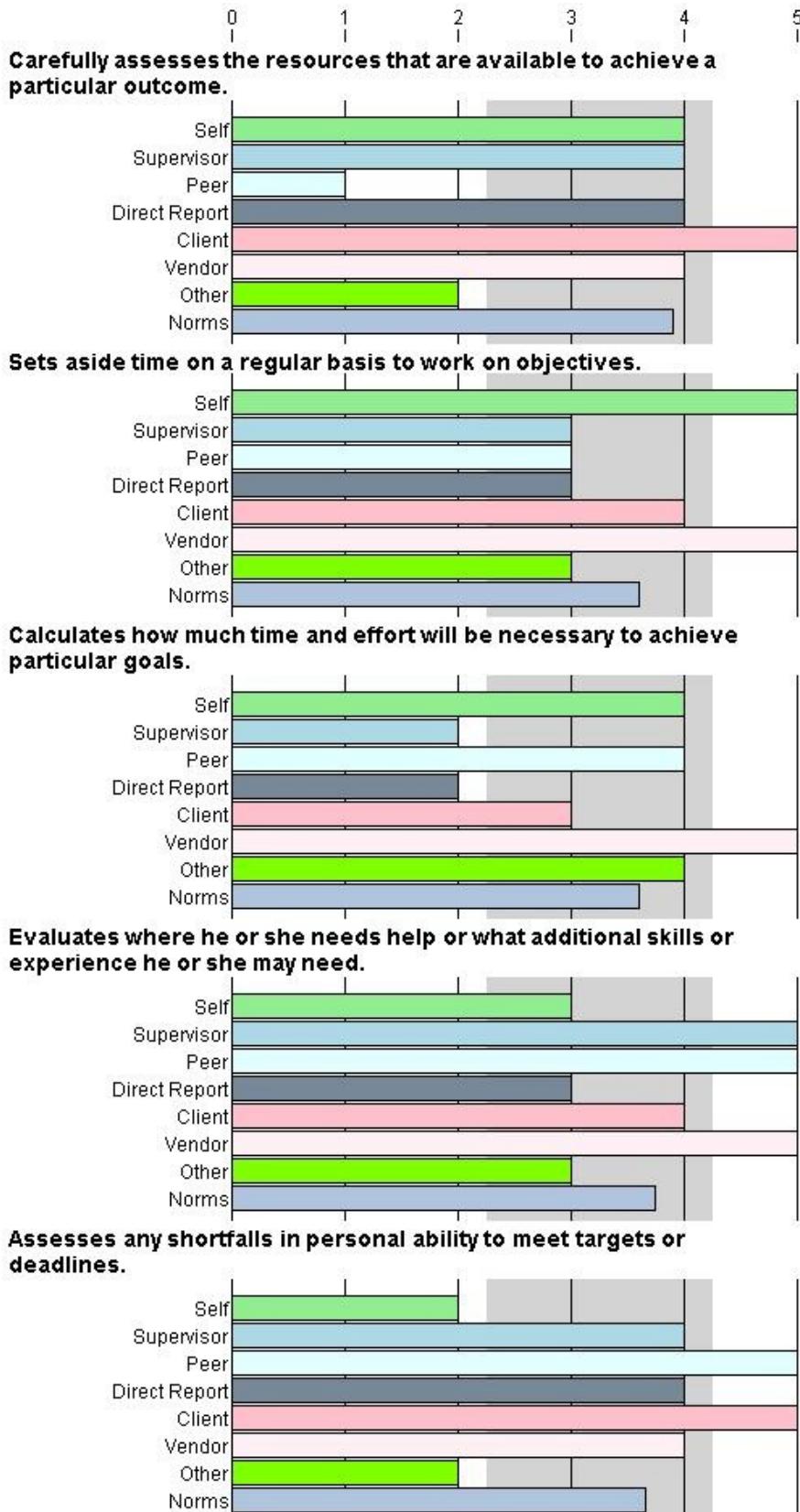
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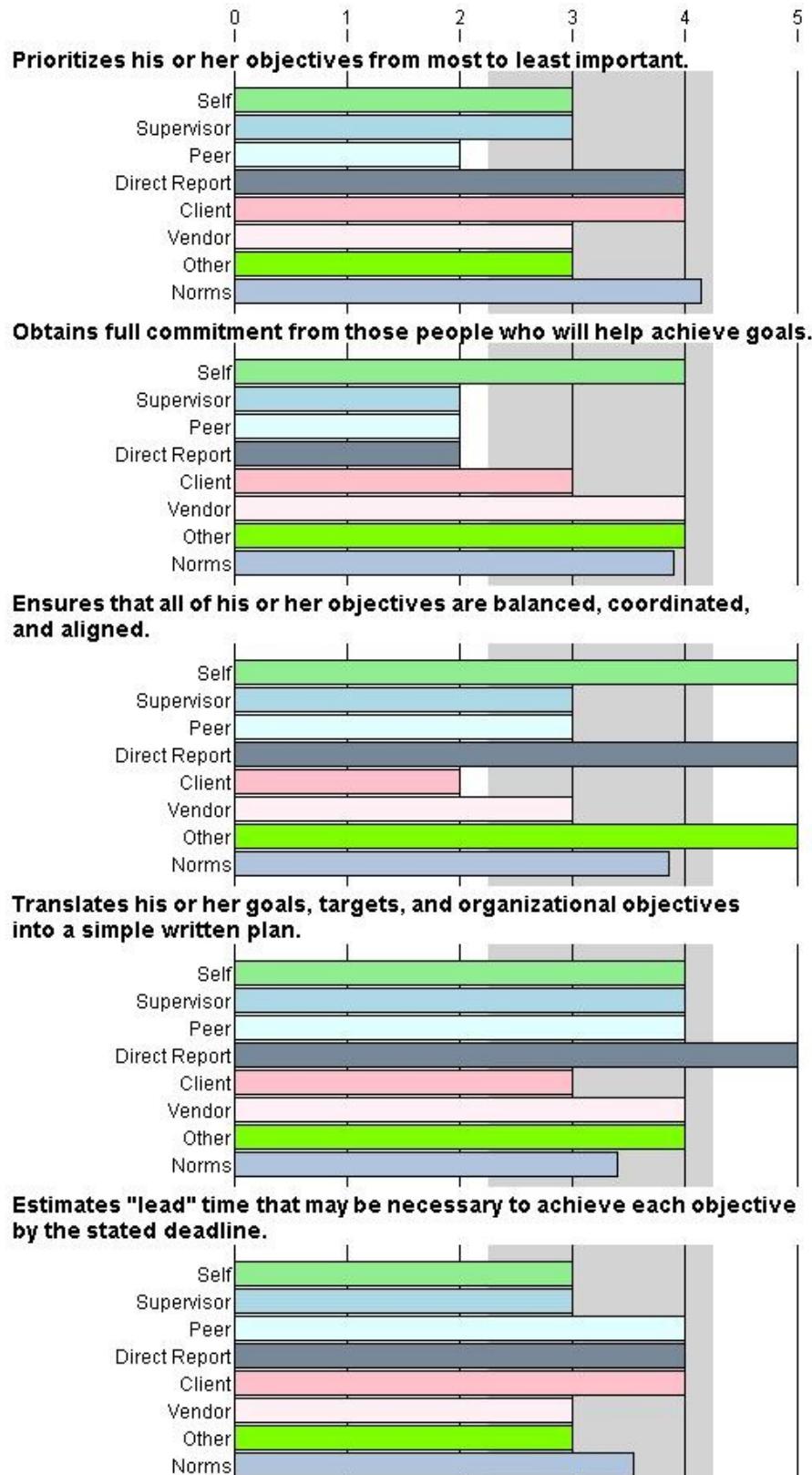
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you find it difficult to exert much influence over the planning and scheduling of activities at work. Such interruptions as "rush" projects, unscheduled delays, and non-productive activities make it very difficult to plan ahead. You are often forced to manage reactively by putting out fires instead of preventing them, which can be very frustrating. Low scorers are likely to find that not being prepared and organized at the outset will keep them from reaching even their first milestones successfully, unless they are extremely lucky. Goals and targets are likely to be pursued randomly and without much effort.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you engage in quiet and reflective planning about how you will go about achieving your goals before you waste time jumping the gun. You are likely to carefully assess available time and resources and organize yourself and others to achieve the best result you can in a planned and ordered way. A high scorer is likely to prioritize the time and the resources needed to achieve the objective, and assemble the individuals who need to help. A person who scores high in this area will understand the risks and potential problems, and therefore develop contingency plans and alternative strategies.







**Planning and Scheduling Work** refers to an individual's ability to manage projects (one-time programs) and processes (ongoing workflow) by applying the major tools and techniques of management. This competency looks at one's ability to analyze complex tasks and break them into manageable units; select and manage resources appropriate to the tasks; use systems and techniques to plan and schedule work; and set checkpoints and controls for monitoring progress.

### **Recommendations for Overall Improvement**

Low scorers need to take more time to plan and organize—well before they jump in trying to achieve their objectives. They must look for balance and coordination among objectives and be absolutely sure that they can meet deadlines or targets. If not, they must change the plan or the goal.

### **Ways to Strengthen or Improve Planning and Scheduling Work**

- Talk to people about their priorities and commitments before estimating how much time, effort, and resources will be necessary to achieve particular goals.
- Use your experience to build appropriate lead-times into your goals, and line up people to help where this is necessary and appropriate.
- Carefully estimate how much time and resources will be required to achieve each goal before committing to any deadlines upon which others might depend.
- After drafting your goals, identify any skill or resource gaps that might exist and plan in detail how you are going to deal with them.
- Force yourself to spend at least a few minutes each day writing out what is important to achieve in the day or the week ahead.
- Make a list and prioritize it into Must Do, Should Do, and Nice to Do and If There Is Time categories.
- Assign time estimates for each activity. Use the formula that assigns weights to the optimistic, most-likely, and most-pessimistic estimates.



# LISTENING AND ORGANIZING

Listening and Organizing refers to an individual's ability to understand, organize, and analyze what is heard in order to make appropriate decisions about what to think and do in response to the message. This competency examines one's ability to identify and test inferences and assumptions; overcome barriers to effective listening; summarize and reorganize a message for recall; and withhold any judgment that can bias a response message.



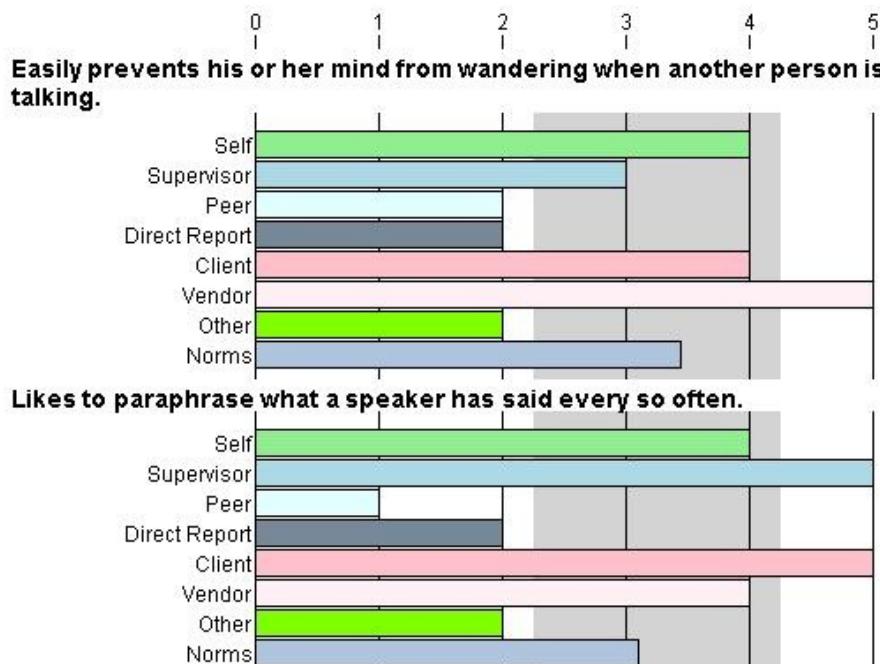
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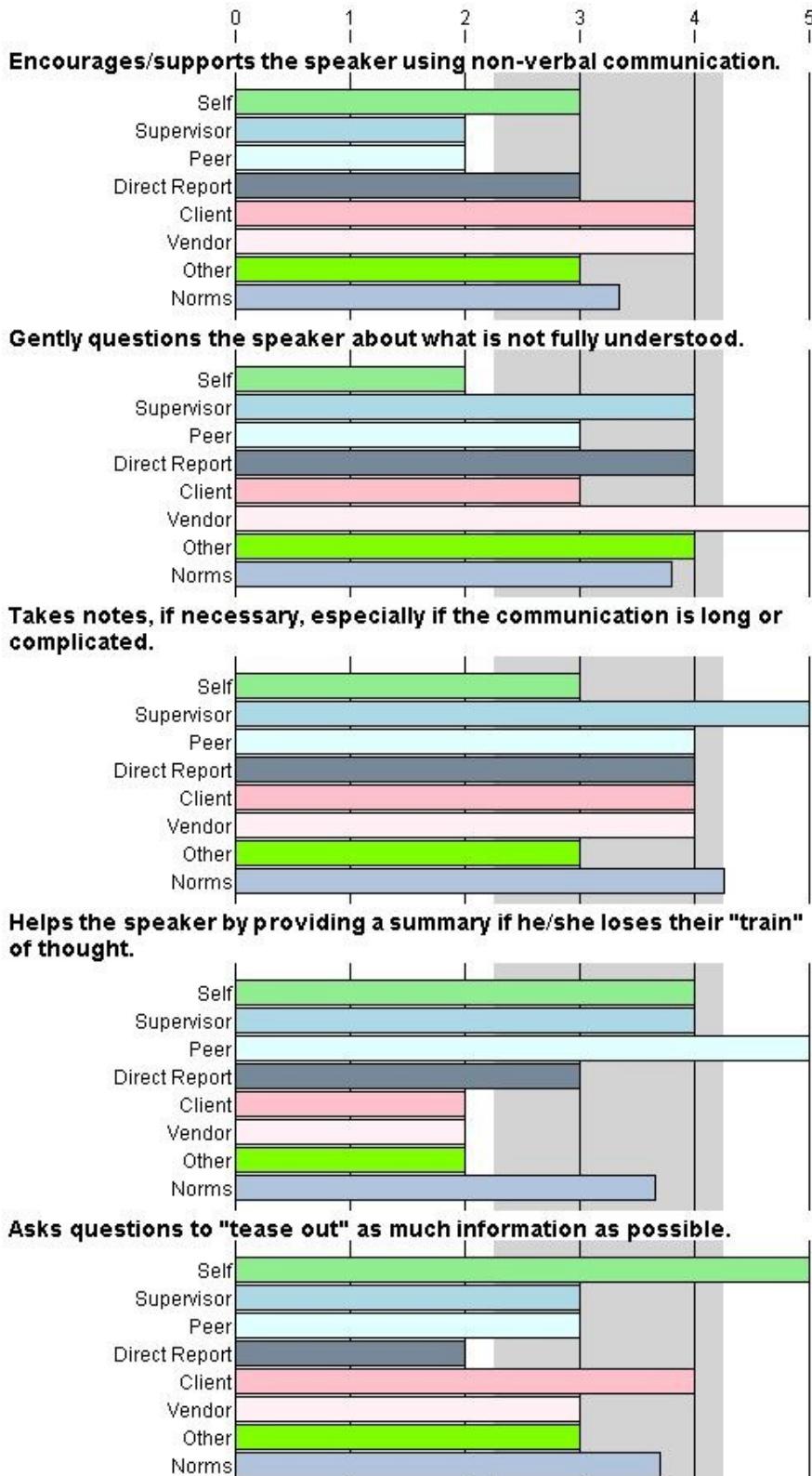
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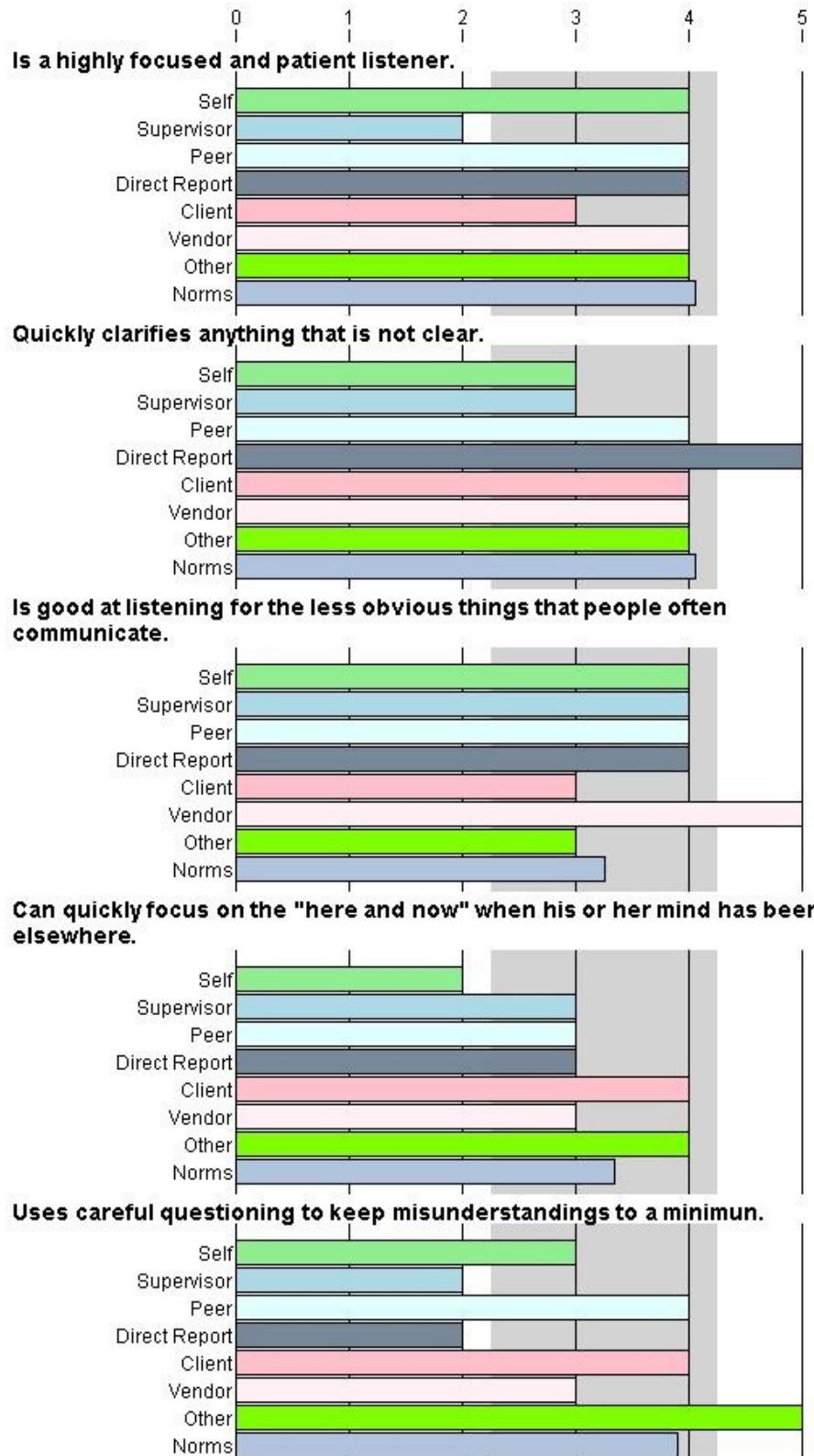
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that when others are talking, you tend to make inferences and assumptions based on your own experiences and needs, rather than consider the speaker's frame of reference. You tend to allow your mind to wander and your attention to go unfocused. A low scorer is likely to pay little attention to the person with whom he or she is communicating and tends to ask few questions for clarification (having neither the time nor the inclination). As a result, they become confused about what is being said and misunderstand the message. Suspend judgment and listen carefully to what people are saying so you can analyze and organize the information and respond effectively.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you well understand the need to ask questions for clarity, as well as paraphrase what is being said to keep the discussion focused and on track. High scorers put themselves in the best position for attentive listening, and ask questions for clarity. They try to summarize what they have understood so there will be no confusion or misunderstanding about what the speaker said.







**Listening and organizing refers to an individual's ability to understand, organize and analyze what is heard in order to make appropriate decisions about what to think in response to the message. This competency examines an individual's ability to identify and test inferences and assumptions; overcome barriers to effective listening; summarize and reorganize a message for recall and withhold judgment that can bias a response message.**

### **Recommendations for Overall Improvement**

Low scorers need to carefully think about how they can ask a range of questions in various conversations to help them to concentrate and pay close attention to what is being said. These questions need to be asked as often as necessary, taking care to listen for the response. You greatly improve your ability to listen effectively if you withhold judgment and summarize the message every so often to confirm your understanding.

### **Ways to Strengthen or Improve Listening and Organizing**

- Concentrate as much as possible on the speaker. Do not think about your next response while the other person is talking.
- If necessary, take notes on what you hear. Use "affirming" body language to show the speaker that you are focused on what he or she is saying.
- Be as patient as you can when people are speaking (and especially if they need time to explain something that is not easy to convey).
- Avoid 'drifting off' into your own mental world, or you run the risk of missing important points.
- Maintain as much direct eye contact as you can and show genuine and focused interest in the communication. Avoid generally showing any sign of distraction, physical or mental.
- Try to smile at people more often, and be as friendly and sincere as you can when they are talking to you.
- Make a strong effort to put yourself in the other person's position and to imagine what they might be feeling or where they might be coming from in sending their message.



# GIVING CLEAR INFORMATION

Giving Clear Information refers to an individual's ability to assess a situation; determine the objectives; and give clear, concise, well-organized, and convincing messages that will best meet the objective. This competency examines one's ability to overcome physical, psychological, and semantic barriers when interacting with others; keep on target and avoid digressions; use persuasion effectively; and maintain a climate of mutual benefit and trust.



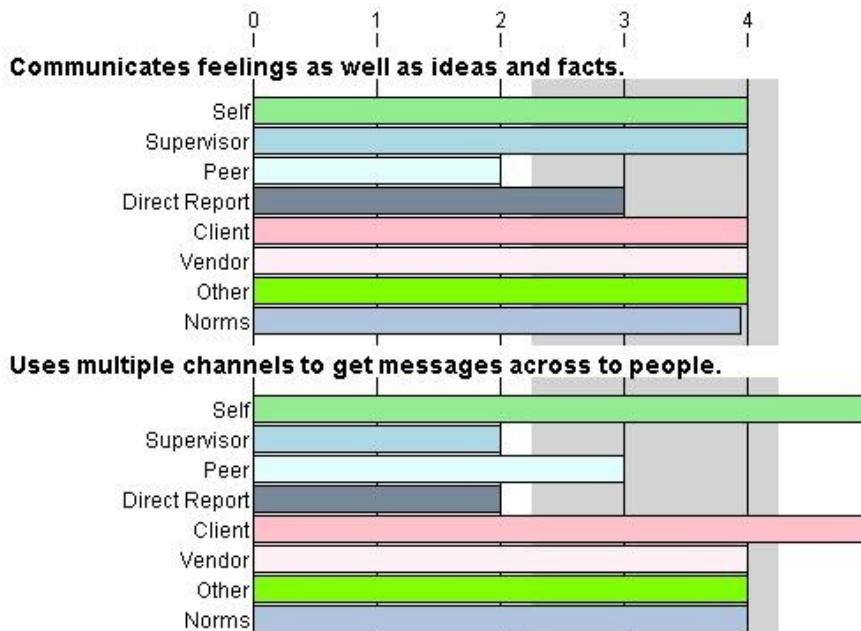
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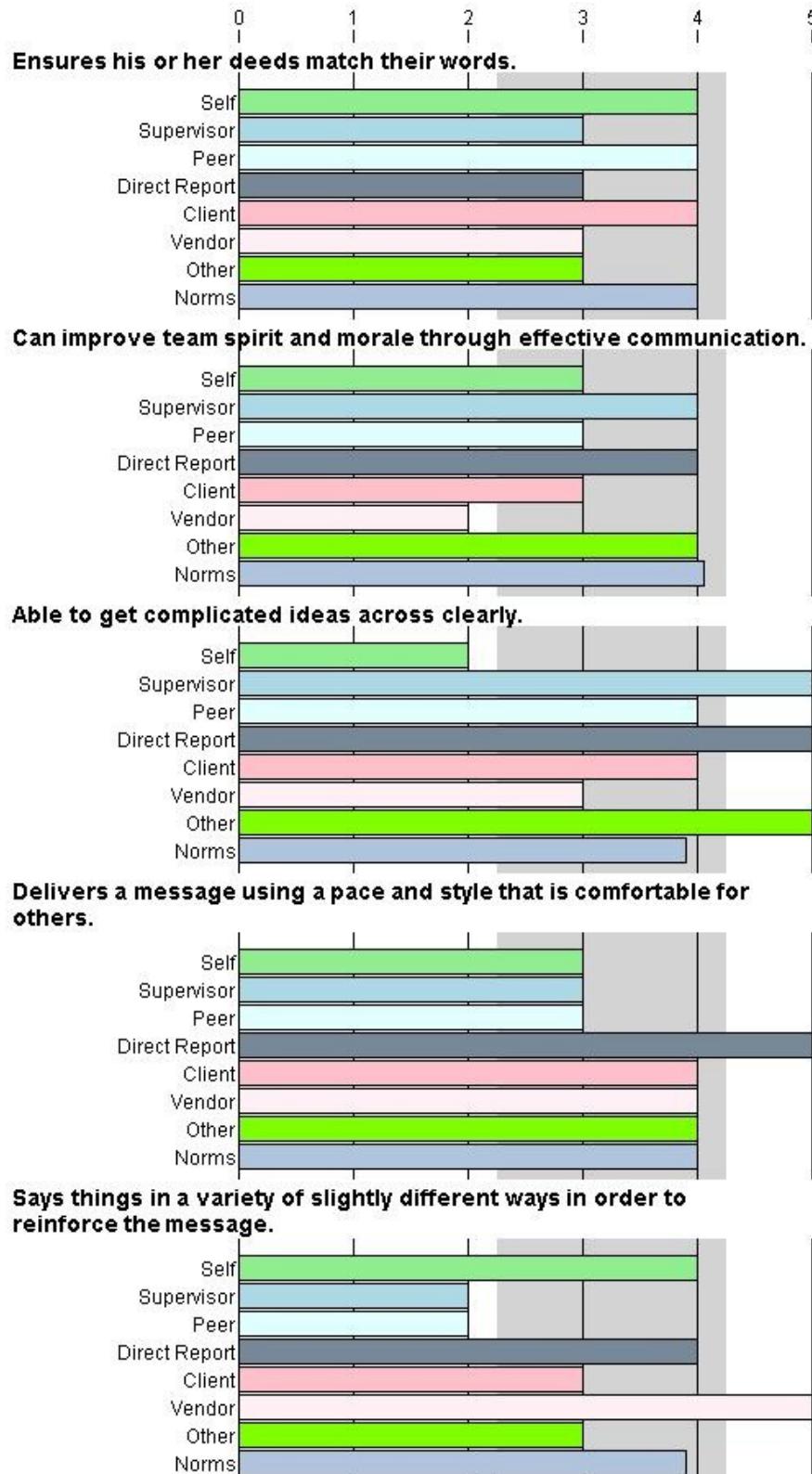
### LOW (less than 2.75)

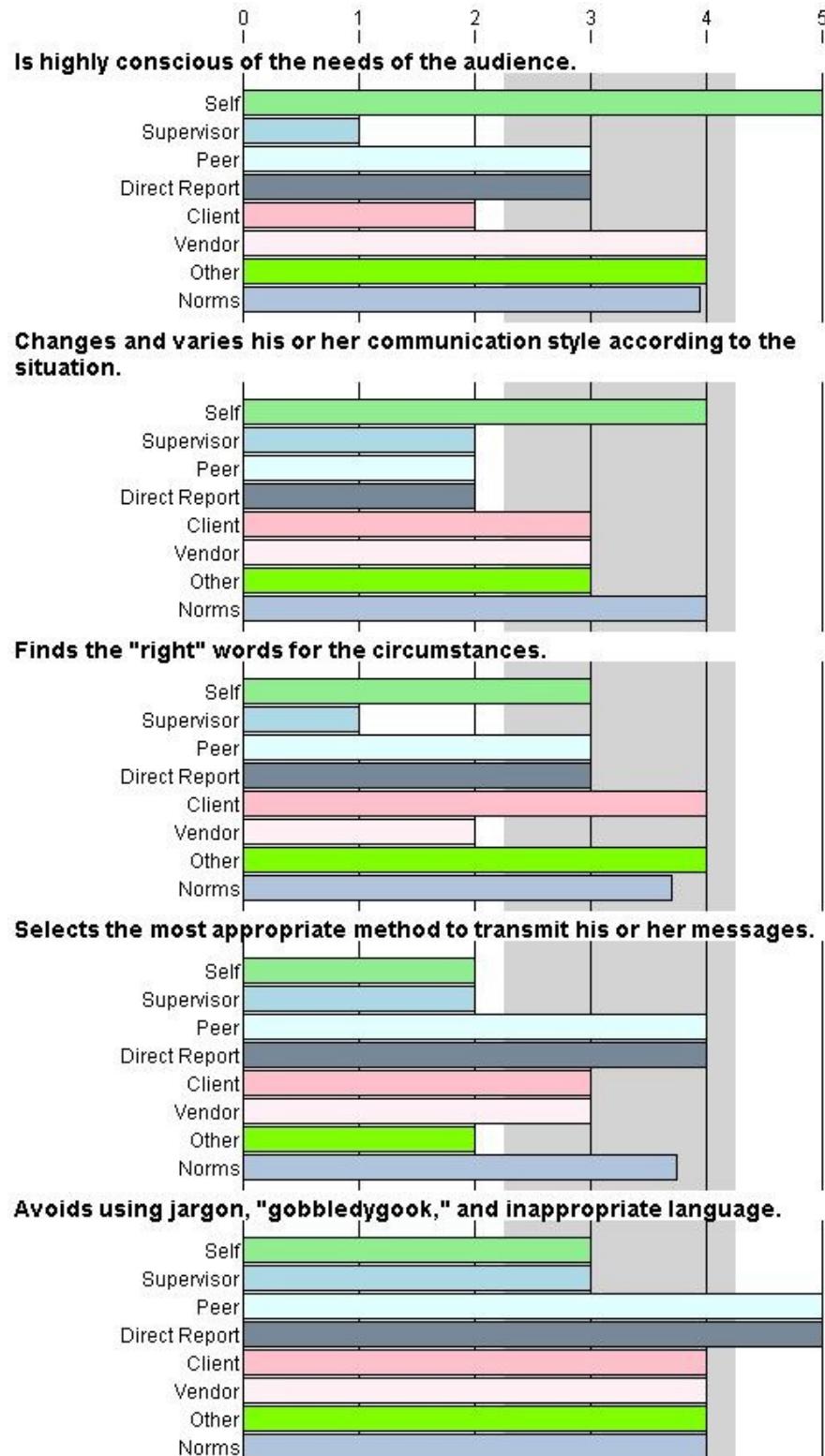
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you sometimes have difficulty organizing and communicating information in a clear, concise, complete, and convincing manner. The meaning of what you want to say is probably clear to you, but the other person has trouble getting the message. There might be barriers or language problems that keep others from completely understanding what you are trying to say. A low scorer tends to find communication somewhat challenging and wants to get it over and done with as quickly as possible. Providing clear information might well be regarded as a chore to the low scorer whose experiences with good communicators and listeners who act appropriately on what they have heard might be negative or limited.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you think carefully about the channels through which you transmit your message, and the communication style that you adopt in order to be successful. To do this, you try hard to always be clear, concise, and consistent in what you say and do. A high scorer is likely to be acutely aware of the power to communicate and influence people by understanding what the audience needs and by preparing and using a variety of transmission methods so that every individual is given the best opportunity to understand the message.







**Giving Clear Information** refers to an individual's ability to assess a situation; determine the objectives; and communicate clear, concise, well-organized, and convincing messages that will best meet the objective. This competency examines one's ability to overcome physical, psychological, and semantic barriers when interacting with others; keep on target and avoid digressions; use persuasion effectively; and maintain a climate of mutual benefit and trust.

## **Recommendations for Overall Improvement**

Low scorers need to take more time to think about how each audience will best understand the message, and select a channel, style, and pace that will maximize that understanding.

## **Ways to Strengthen or Improve Giving Clear Information**

- Recognize that your actions are likely to speak most loudly when you are communicating to others.
- Do things to support or backup your verbal messages to help people understand where you are coming from.
- Practice varying your personal communication styles or approaches to suit the various situations that you encounter.
- Avoid complex, jargon-based, or overly technical words or phrasing when you think your audience will find it hard to understand or act upon your message.
- Deliver all of your messages in a slow and measured way, taking into account the particular needs of the subject and the audience.
- Make a strong effort to put yourself in the other person's position, and to imagine what they might be feeling or where they might be coming from in sending the message.
- Find out what interests you have in common with each person with whom you regularly communicate, and use this to help build your relationship with them.



# GETTING UNBIASED INFORMATION

Getting Unbiased Information refers to an individual's ability to use questions, probes, and interviewing techniques to obtain unbiased information, and then interpret it appropriately. This competency examines one's ability to use directive, non-directive, and reflective questions effectively; use probes to elicit additional information; recognize latent and manifest meaning; confirm understanding; and obtain agreement.



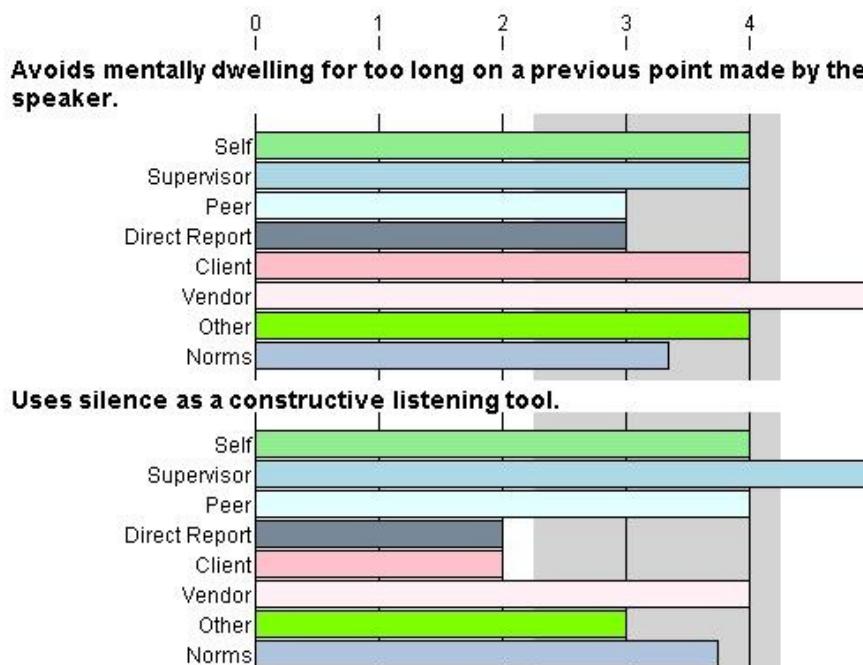
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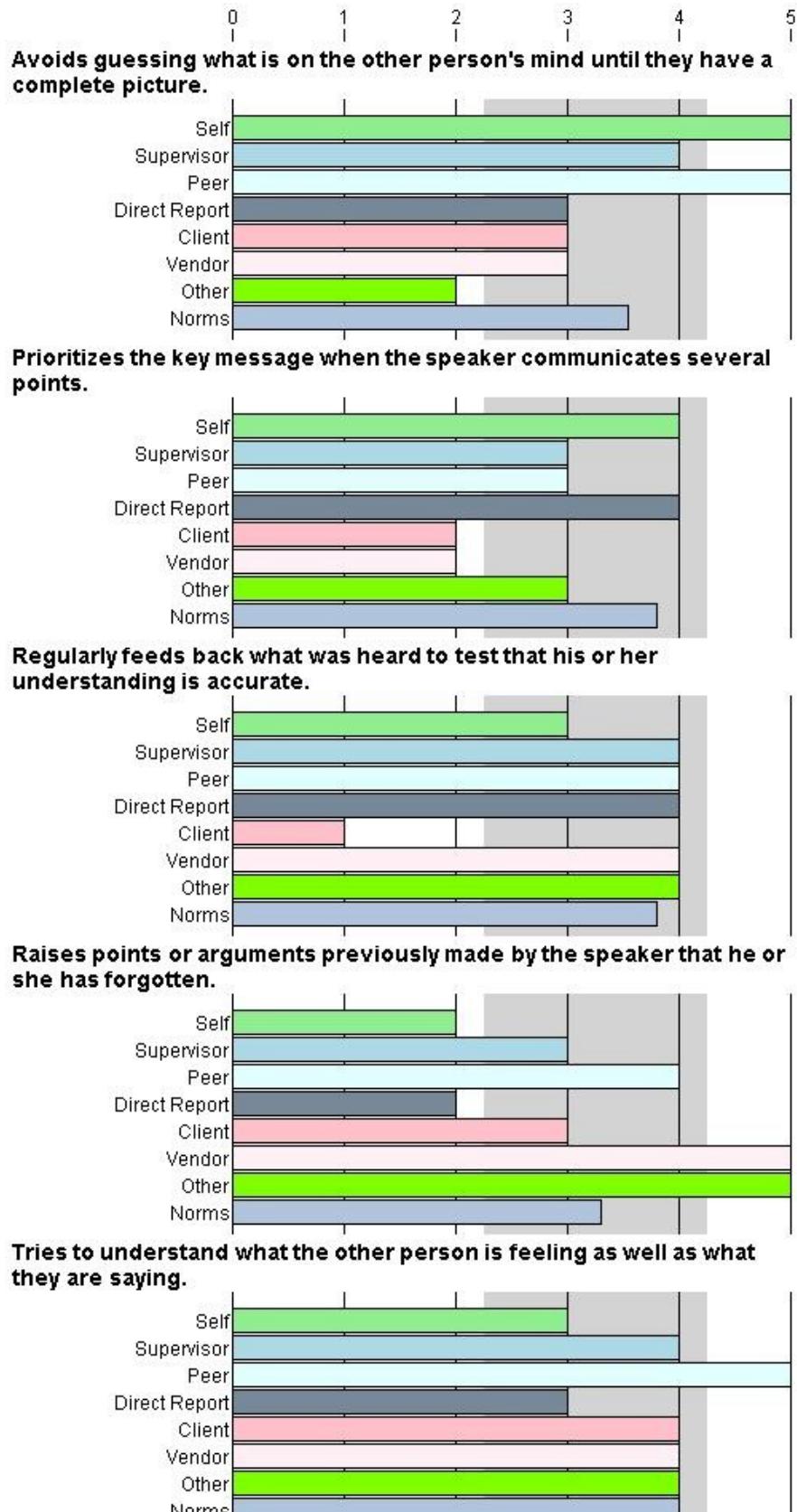
### LOW (less than 2.75)

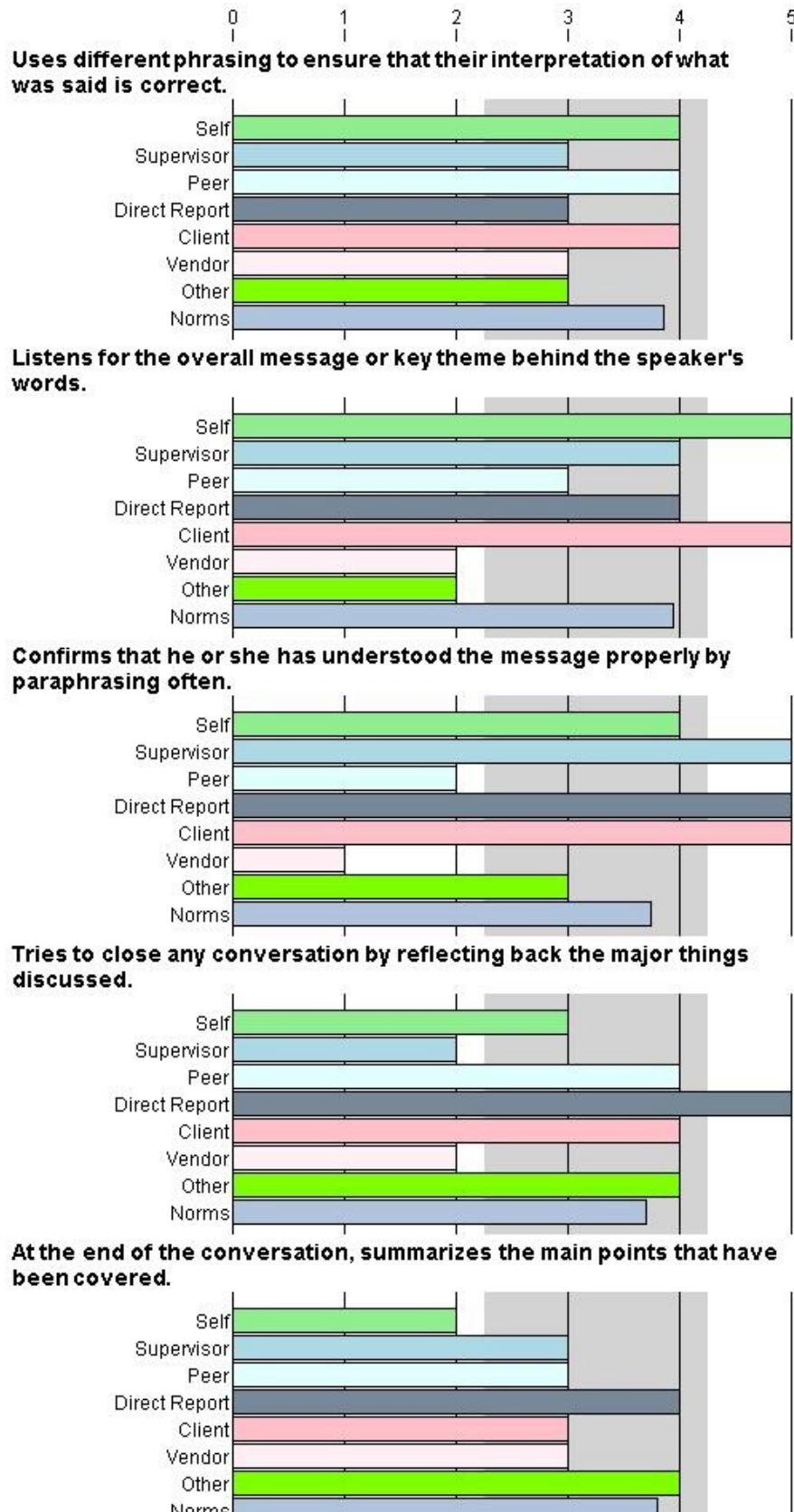
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you have trouble phrasing questions so that you get unbiased responses and accurate information. People tend to say what they believe will please or impress you. A low scorer tends to selectively listen or only pay attention to parts of the conversation, and therefore does not have enough information to summarize well. The quality of the conversation consequently suffers, and in the end, neither party is entirely clear as to whether or not you have reached a common understanding.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you work hard at interpreting and evaluating what a speaker is really trying to say, and you repeat it back to them in summary form so that a mutual understanding can be reached. A high scorer does not generally let a lengthy discourse go by without offering a quick summary or reflecting back the message before moving on. His or her communications are often more effective and focused because of this practice.







**Getting Unbiased Information** refers to an individual's ability to use questions, probes, and interviewing techniques to obtain unbiased information, and then interpret it appropriately. This competency examines one's ability to use directive, non-directive, and reflective questions effectively; use probes to elicit additional information; recognize latent and manifest meaning; confirm understanding; and obtain agreement.

### **Recommendations for Overall Improvement**

Low scorers need to take the time to develop a range of generic questions that can be asked to help them pay close attention to what is being said in any given conversation and get unbiased information. These questions need to be asked as often as possible, and the individual must pay close attention to the responses they are given.

### **Ways to Strengthen or Improve Getting Unbiased Information**

- Try to slow down your thinking during conversations and concentrate on the whole message from the speaker, including the emotions that are transmitted.
- As a direct test of your ability, look to paraphrase what you hear from time to time and directly check your understanding.
- As soon as the discussion or meeting is over, make notes that capture the facts you've just uncovered.
- Ask open-ended questions that require more than a "yes" or "no" answer.
- Do not think about your next question while your respondent is speaking. Pay full attention to what is being said.
- Be pleasant, positive, and non-judgmental (adult-to-adult, not parent-to-child).
- If you work on your ability to use non-directive, neutral questions and probes, you can greatly improve the quality and depth of information you receive from others.
- Employ the "funnel technique" (i.e., start with non-directive questions, then use self-appraisal questions, and then use directive questions to complete the picture)



# TRAINING, COACHING AND DELEGATING

Training, Coaching, and Delegating refers to an individual's ability to select the right people and develop them; reach agreement on plans for action; keep a balance between input and output; transfer responsibility to the employee; provide feedback effectively; and appropriately reward good performance.



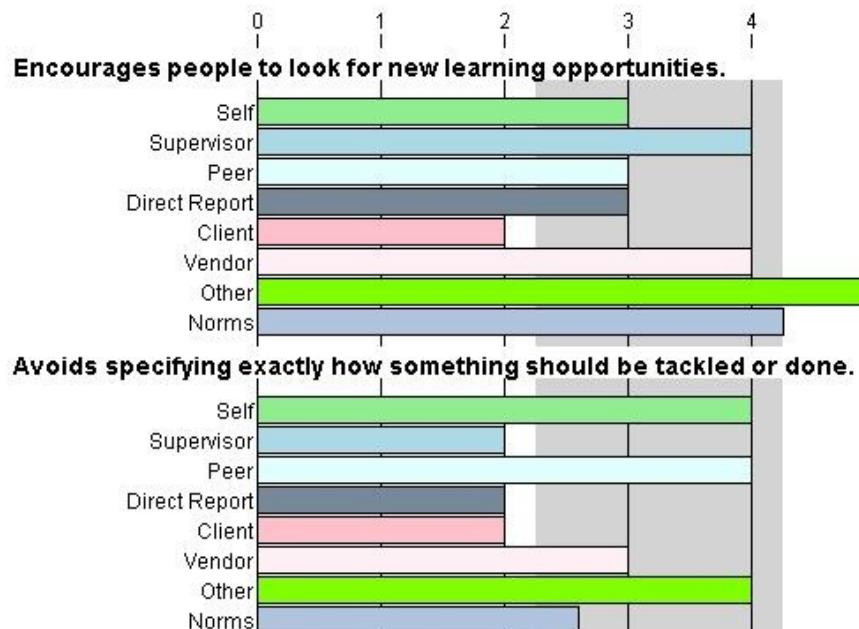
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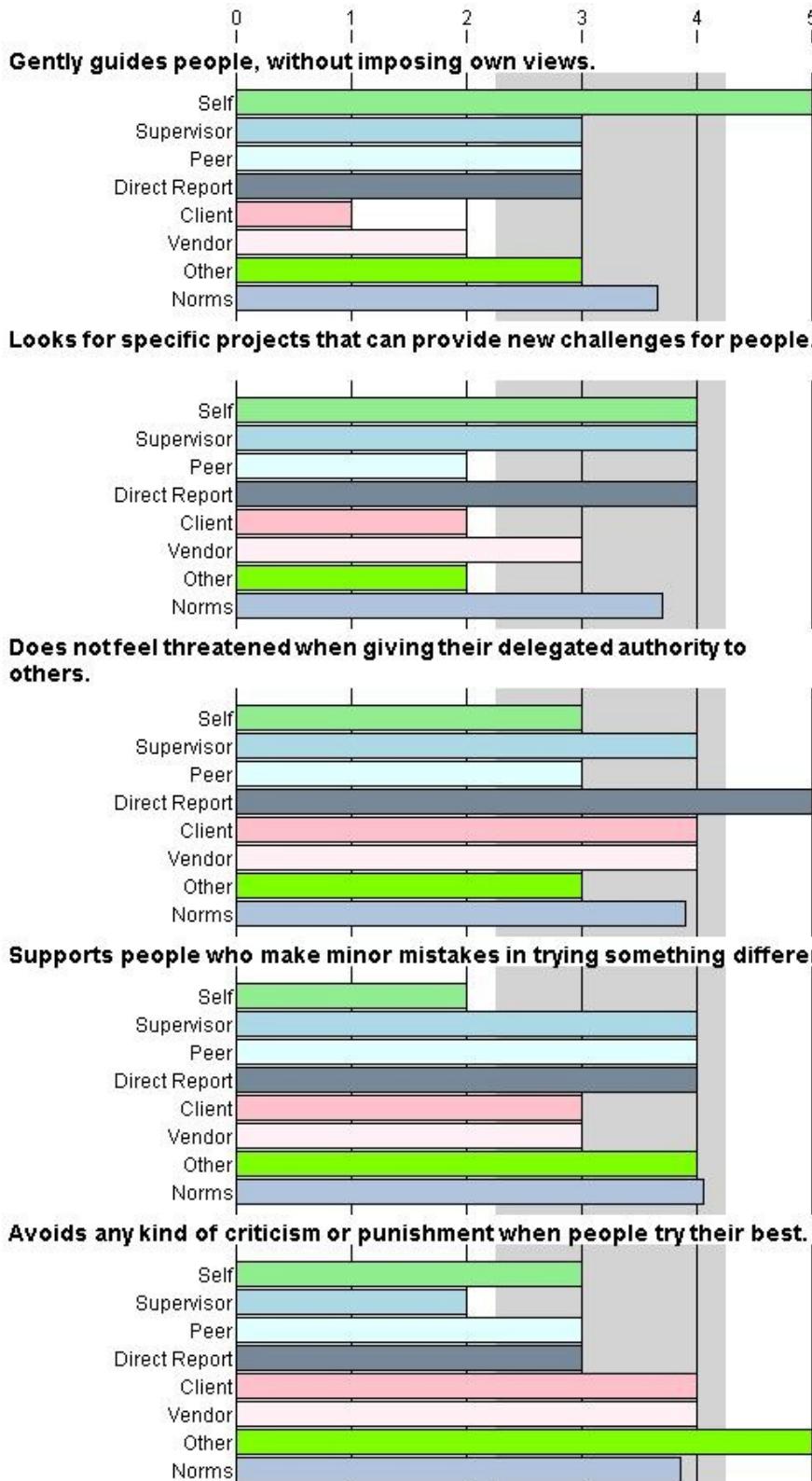
### LOW (less than 2.75)

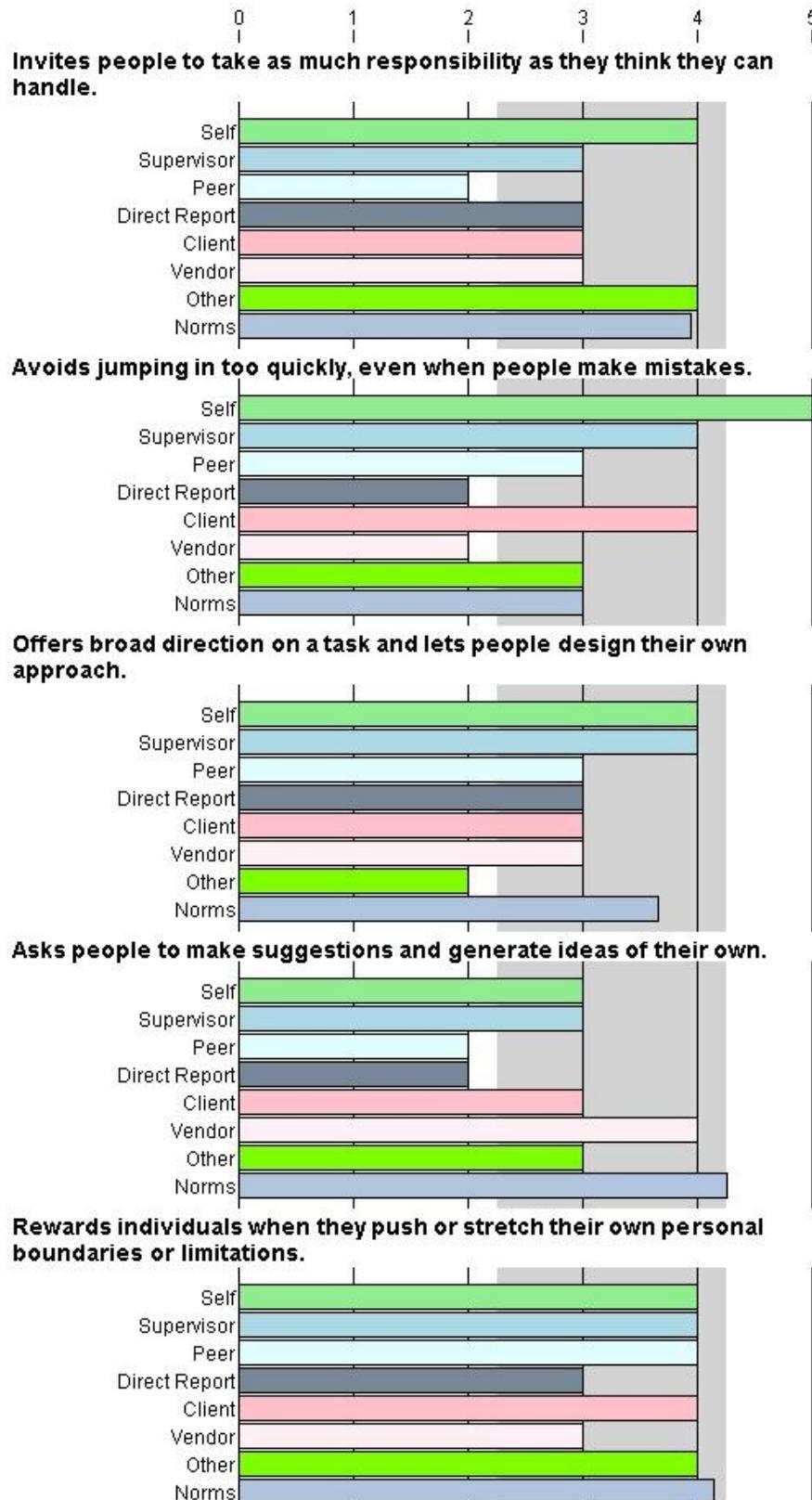
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you have trouble helping others complete tasks and take on more responsibility and not delegate as much as you should, preferring to handle assignments yourself rather than train and coach others to handle them. A low scorer tends to take on too much by themselves and usually offers low-level or "safe" tasks to others that can be supervised or that carry low risk. Low scorers tend to also impose their opinions on others too regularly, and even take tasks and projects back from people who are not performing to their exacting standards.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you enjoy seeing people take on new and stretching tasks and personally grow because they are given the room to take reasonable risks and new approaches. You tend to delegate a lot of responsibility to people you believe are capable, and you encourage people to take on personal challenges and goals. A high scorer tends to actively look for ways to empower individuals to take on responsibility and even move the limits of their comfort zone in handling new or different tasks. High scorers rarely feel uncomfortable about giving their authority to others and will generally give people as much support as they need, even when mistakes or less-than-optimal paths are chosen.







**Training, Coaching, and Delegating** refers to an individual's ability to select the right people and develop them; reach agreement on plans for action; keep a balance between input and output; transfer responsibility to the employee; provide feedback effectively; and appropriately reward good performance.

### **Recommendations for Overall Improvement**

Low scorers must develop the ability to analyze human behavior, as well as use positive and negative reinforcement to influence others. These things are critical to success in this competency. Low scorers also need to become less structured and more trusting that others can achieve results that stand up to their standards. They should offer only broad directional guidance when delegating (or assigning a task), and should avoid intervening unless it is absolutely critical or the individual asks for help.

### **Ways to Strengthen or Improve Training, Coaching, and Delegation**

- Look for a variety of new learning opportunities for those you are helping to develop.
- Describe possible courses of action, but leave enough room for people to decide on their own approaches and goals.
- Develop a set of general questions that you can ask to help individuals assess whether or not their current approach or actions represent the best they can achieve.
- Encourage individuals you coach to look at the deeper root causes of their challenges, problems, or concerns.
- Identify specific tasks or projects that can challenge and stretch people's skills, or get them thinking in new directions.
- Support people when they make minor or understandable mistakes.
- Reward hard work, innovation, and effort to stretch personal boundaries.



# APPRaising PEOPLE AND PERFORMANCE

Appraising People and Performance refers to an individual's ability to carry out a constructive performance appraisal by providing ongoing feedback, jointly evaluating past performance, coming to agreement on future expectations, and developing a plan to see that these expectations are met.



## Interpretation

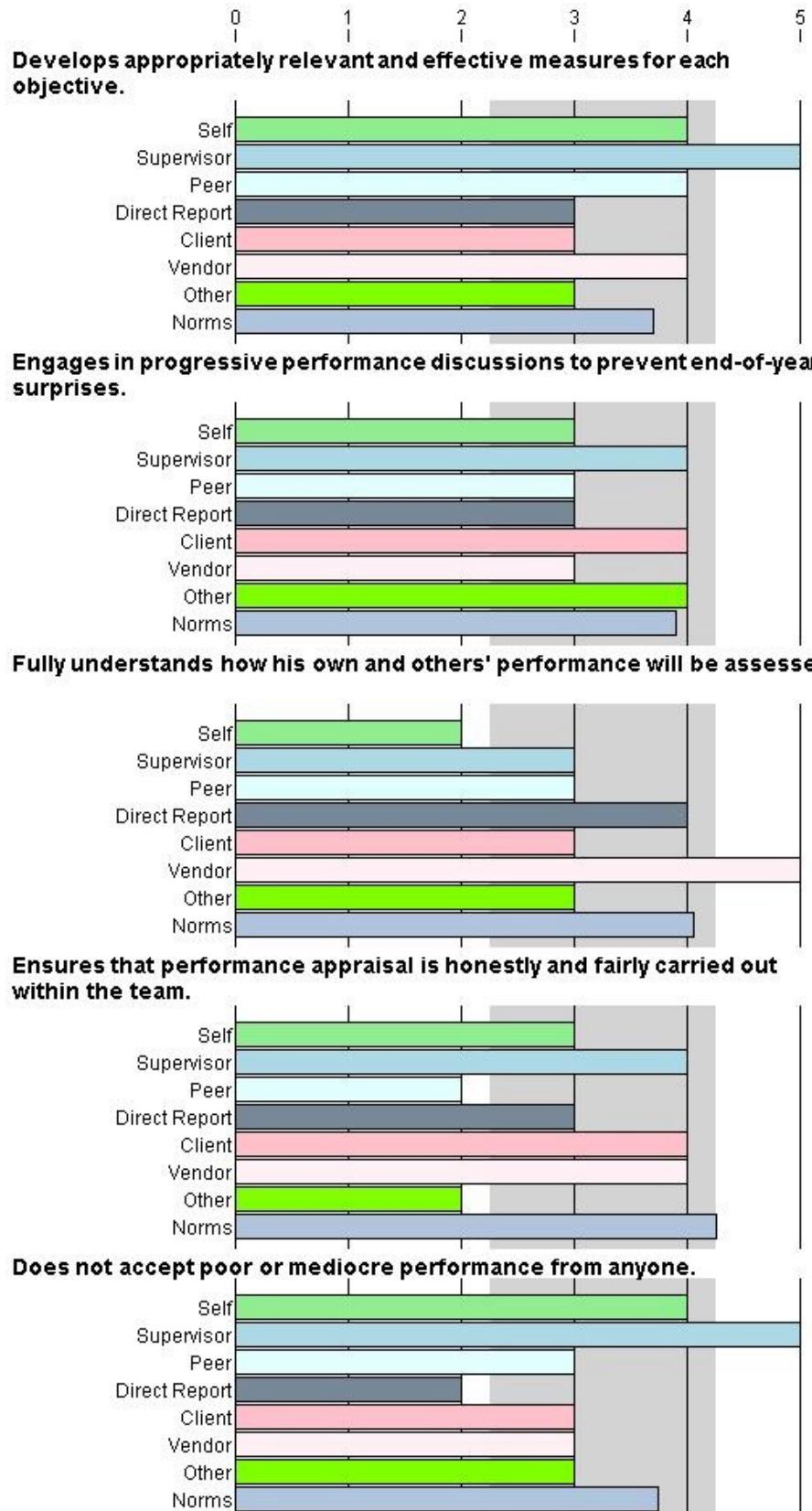
### LOW (less than 2.75)

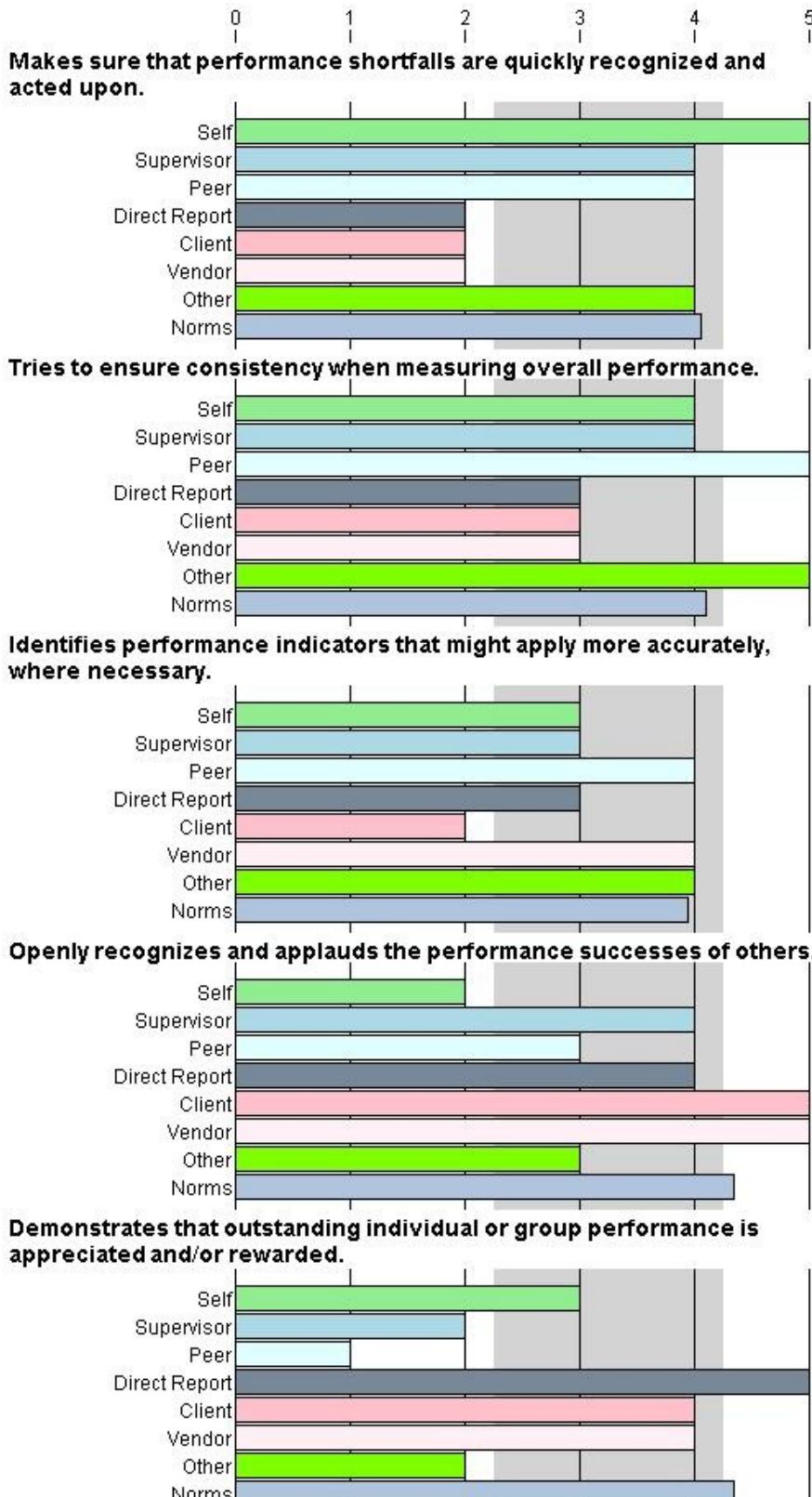
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that assessing the performance strengths and weaknesses of others and their root causes (the analysis of human behavior) does not come easily for you. Giving constructive, corrective feedback might be even more difficult. A low scorer tends to set few goals, and even when they do, the goals lack focus and clarity. This makes it difficult to measure general progress. The team will likely suffer from this weakness. Low scorers tend to operate quite independently within a team, and any negative comments about their performance at the end of any appraisal period will consequently come as a surprise.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that this individual recognizes the importance of setting clear and unequivocal goals for him- or herself and others, and knows that reviewing performance on a regular basis is critical to keeping people on track. This person also tries to be consistent in quickly addressing performance shortfalls and in celebrating performance successes. A high scorer tends to be clear and focused about personal work objectives and takes an interest in improving his or her own performance and that of the team as a whole. High scorers are also likely to quickly recognize personal or team shortfalls (and act to correct the situation), as well as applaud performance successes.







**Appraising People and Performance** refers to an individual's ability to carry out a constructive performance appraisal by providing ongoing feedback, jointly evaluating past performance, coming to agreement on future expectations, and developing a plan to see that these expectations are met.

### **Recommendations for Overall Improvement**

Low scorers need to identify the overall goals of the organization and the team before developing their own personal set of linked, clearly written, and measurable performance objectives. Low scorers should also spend more time tracking overall team and individual performance on a regular basis, and respond to relative success and failure in positive ways, on a shared basis. They should practice giving feedback to others and get them to spell out the actions they will take to improve performance.

### **Ways to Strengthen or Improve Appraising People and Performance**

- Go out of your way to recognize outstanding performance, and do it publicly to encourage others to do something similar.
- Be consistent in evaluating performance and in providing feedback; apply the same standards to all employees.
- Before conducting a performance-feedback session, take notes on the key items of information that will be passed along to the employee. Stick to these items during the feedback session; do not wander off the topic.
- Document and remember the positive and the negative aspects of individual performance. We have a tendency to remember and place too much importance on negative performance. Be sure to acknowledge and praise the good things.
- If you provide negative feedback, provide it promptly and factually. Explain or describe the defect, the desired level of performance, and suggested solutions to the performance problem. Do not engage in emotional arguments over the issue with the employee.
- In giving negative feedback, separate the person from the performance. Do not personalize negative feedback or say things like "You are lazy". Rather, talk about the behaviors that are wrong (e.g., "This is the third time you are late with a report").
- Work with employees to help them prepare an individual development plan for the next year that lists activities and goals for their personal growth and development.



# COUNSELING AND DISCIPLINING

Counseling and Disciplining refers to an individual's ability to counsel and discipline in a positive manner to restore the employee's performance to an accepted standard or norm without any loss of dignity. This competency examines one's ability to get the employee to accept responsibility for correcting a deviation within an agreed-upon time frame, as well as reinforce the employee's behavior when it results in improved performance (or take the appropriate action if no improvement occurs).



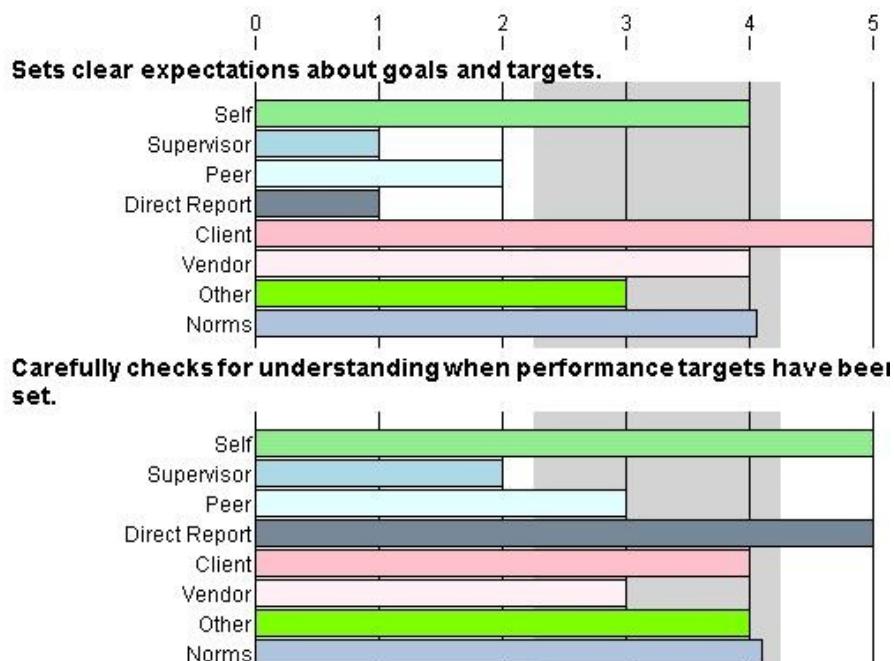
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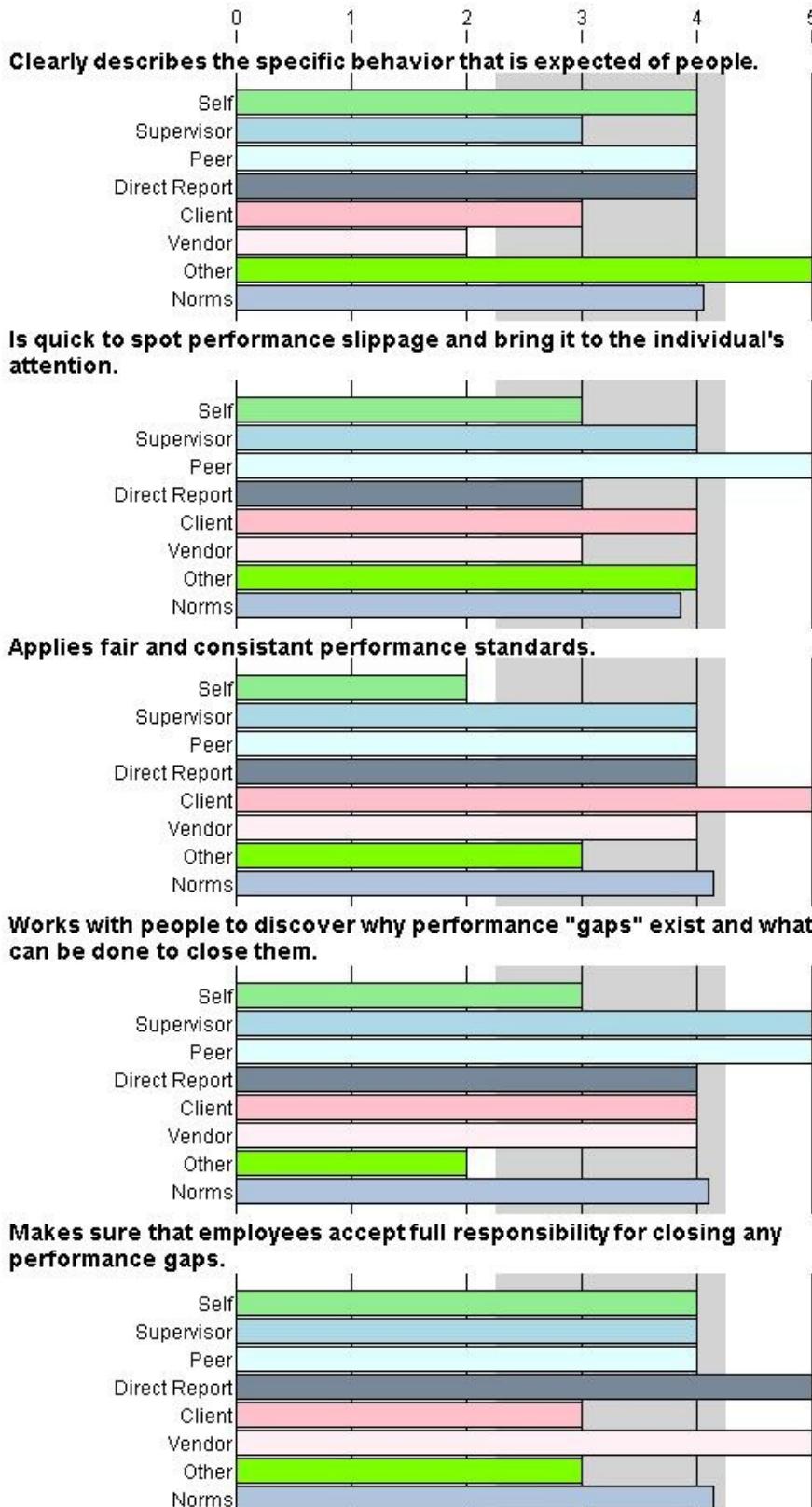
### LOW (less than 2.75)

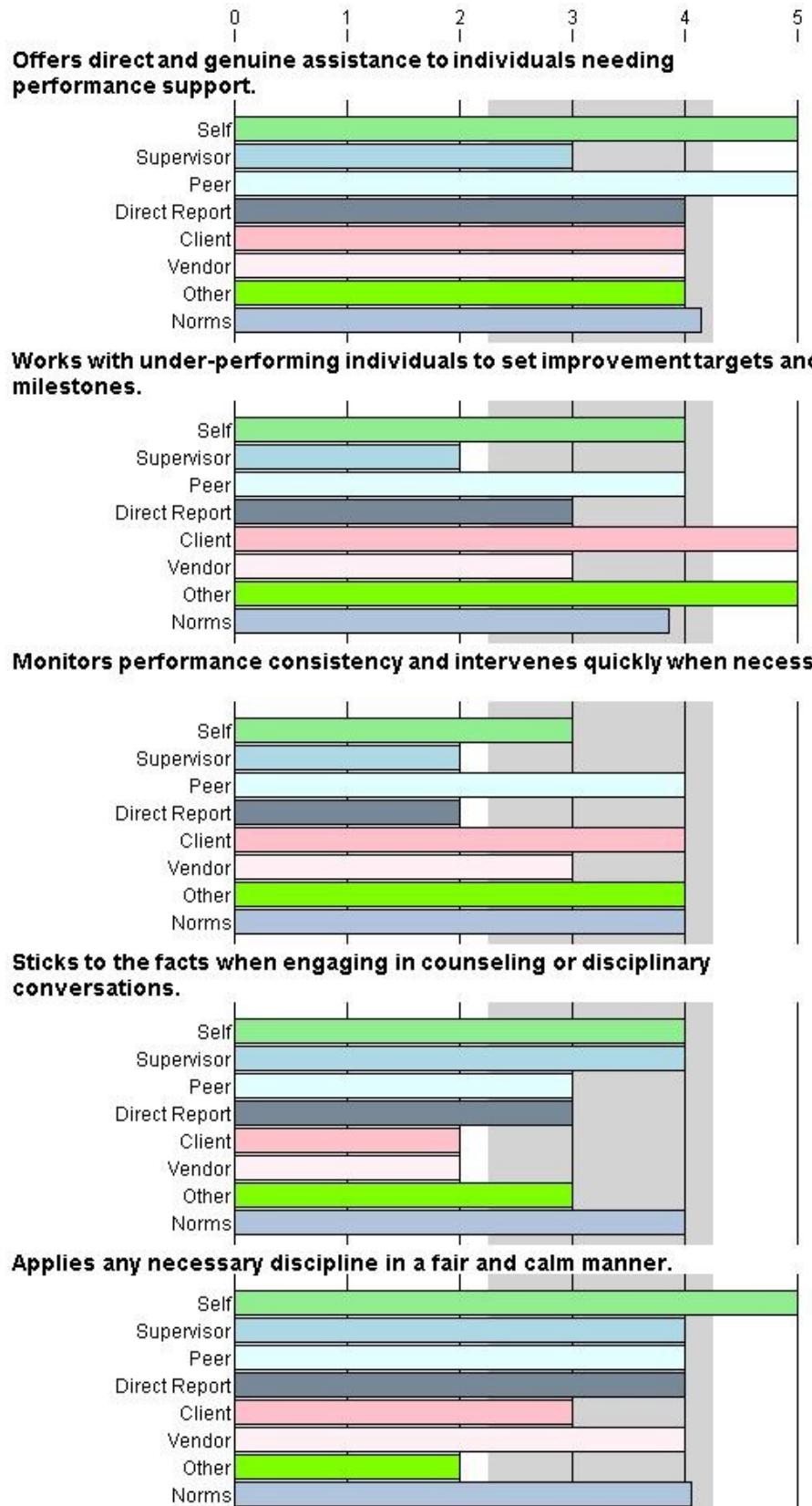
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you are unlikely to set clear enough performance standards for the people you manage and might not spend enough time reviewing progress to ensure that targets are met. As a result, mediocre or poor performance goes unchecked for long periods of time, and counseling and discipline are either avoided or applied far too late. A low scorer is not likely to pay much attention to the day-to-day performance of his or her employees, and is seriously out of touch with his or her responsibilities as a leader.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you set clear performance standards for the people you manage and regularly review progress to ensure that targets are met and each individual stays on track. You are likely to firmly but fairly counsel or discipline individuals when there is a need to do so. A high scorer is likely to see counseling and discipline as a positive way to help people recognize a shortfall and get performance back to the standards expected.







**Counseling and Disciplining** refers to an individual's ability to counsel and discipline in a positive manner to restore the employee's performance to an accepted standard or norm without any loss of dignity. This competency examines one's ability to get the employee to accept responsibility for correcting a deviation within an agreed-upon time frame, as well as reinforce the employee's behavior when it results in improved performance (or take the appropriate action if no improvement occurs).

## **Recommendations for Overall Improvement**

Low scorers need to work with people collaboratively to establish and clarify goals and standards at the outset. They must establish a regular monitoring process and step in with help and support where needed. If performance starts to slip, low scorers need to step in immediately and deal with the situation firmly, using counseling and discipline as much as necessary to get performance back on track.

## **Ways to Strengthen or Improve Counseling and Disciplining**

- If you provide counseling or disciplinary feedback, provide it promptly and factually. Explain or describe the defect, the desired level of performance, and suggested solutions to the performance problem.
- In giving counseling feedback, be sure you comment on the performance itself, not the person. Talk about unacceptable behavior.
- Let employees know that you are willing to provide feedback, so that they will come to you for advice before mistakes are made.
- Recognize what the person has done well, and encourage him or her to build on these strengths.
- Set a target date to review performance, and provide feedback on a regular basis. For example, decide to review a subordinate's work every 2 weeks; provide feedback within 24 hours of the review.
- Always set a date for a follow-up session to review progress.
- To learn to give good feedback, observe and practice the behavior of others. Concentrate on providing a description instead of an evaluation or judgment. Give the employee a chance to explain his or her side.



# IDENTIFYING AND SOLVING PROBLEMS

Identifying and Solving Problems refers to an individual's ability to identify barriers that interfere with the achievement of goals and apply a systematic set of procedures to eliminate or reduce the causes. This competency examines one's ability to distinguish between symptoms and problems; collect and weigh evidence relating to causes; and implement the most appropriate course(s) of action.



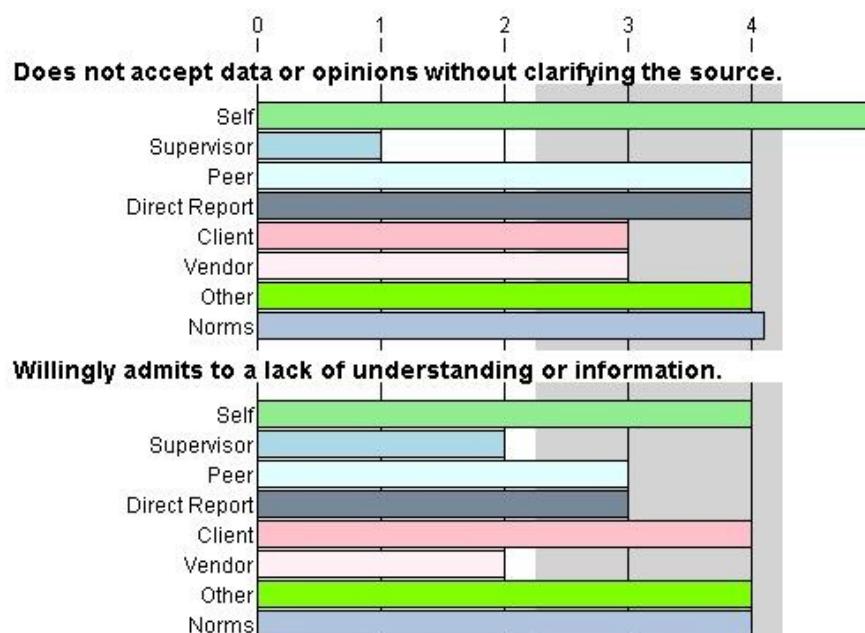
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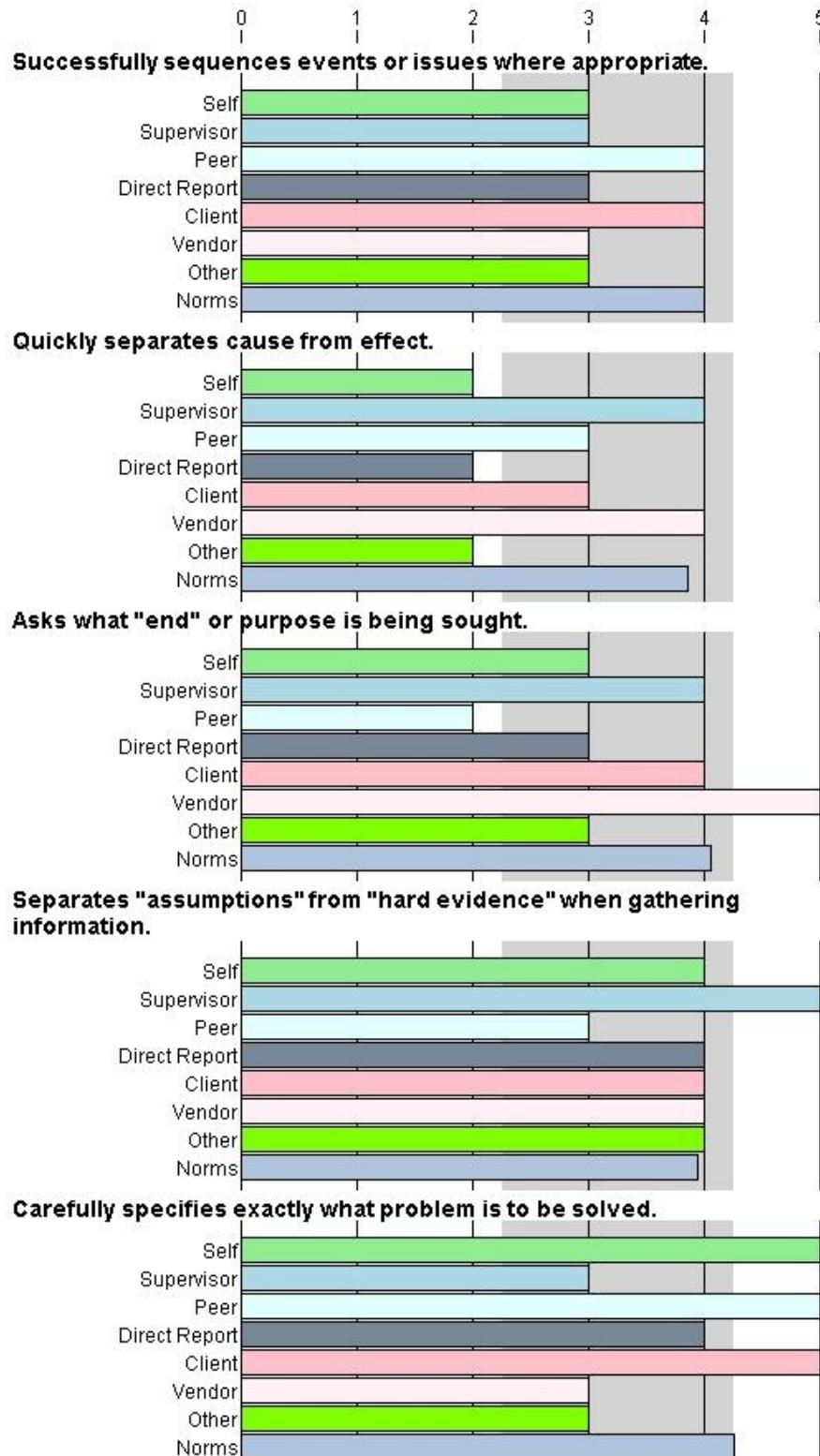
### LOW (less than 2.75)

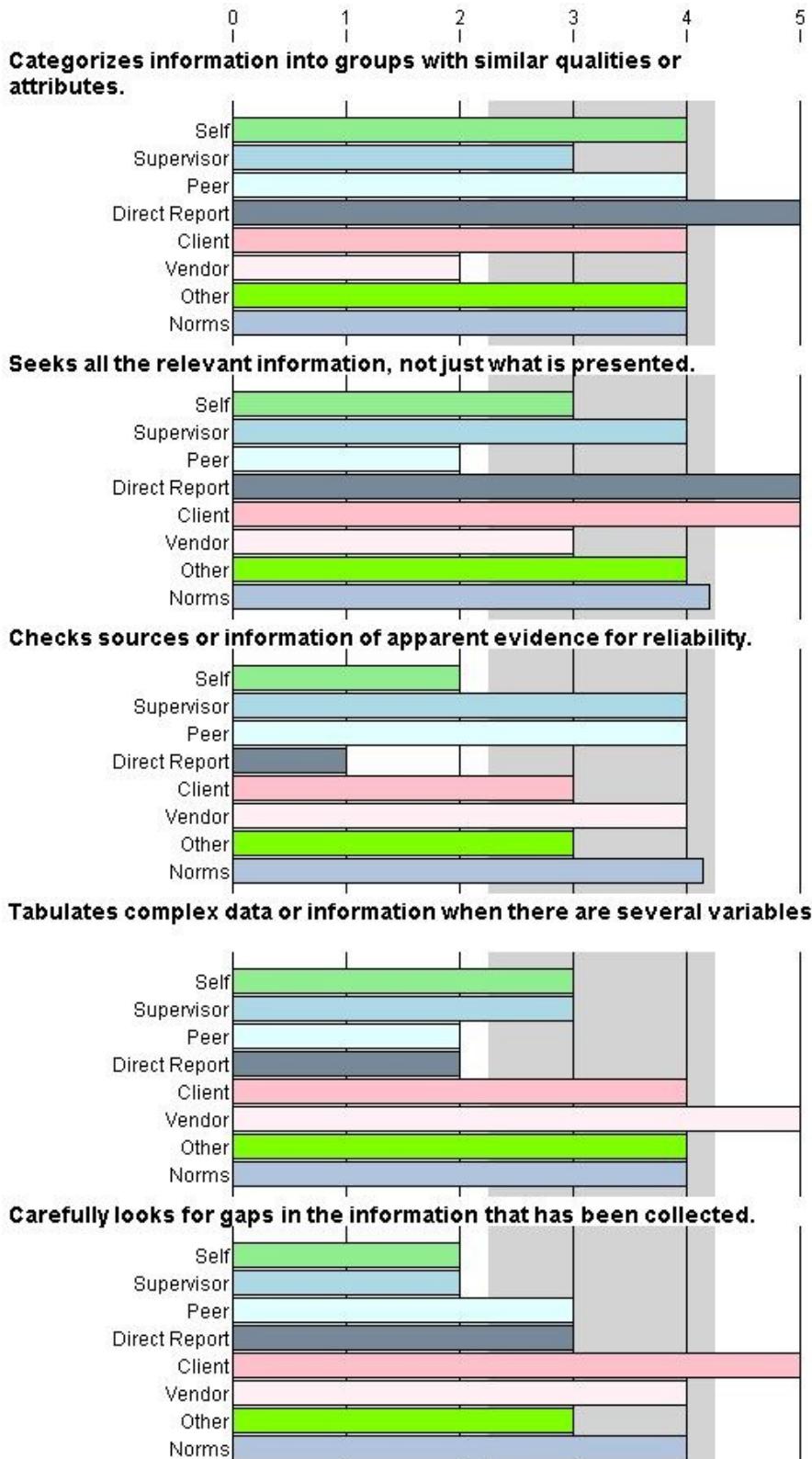
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you need to improve your overall problem-solving skills. You tend to confuse symptoms with problems and have shown difficulty in identifying root causes, which must be dealt with. A low scorer does not generally understand the entire situation, but nevertheless tends to make decisions and try to solve a problem without first gathering all the necessary facts and opinions. Low scorers are likely to willingly accept information without giving it full scrutiny, automatically assuming that the data or the source of data is credible and reasonable.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you are an efficient assembler, organizer, and categorizer of the information you need to identify a problem and then make a decision to solve it. You tend to be generally aware of what you are looking for and are able to spot gaps that require further research. A high scorer tends to adopt a systematic process for gathering and sifting through information about an issue or a problem, challenging the source of the data as well as the information itself for relevance and reliability. A high scorer is quick to ask questions to gain understanding and will keep the overall goals at the forefront of their thinking.







**Identifying and Solving Problems** refers to an individual's ability to identify barriers that interfere with the achievement of goals and apply a systematic set of procedures to eliminate or reduce the causes. This competency examines one's ability to distinguish between symptoms and problems; collect and weigh evidence relating to causes; and implement the most appropriate course(s) of action.

### **Recommendations for Overall Improvement**

Low scorers need to first think about how they will gather and process data before actually doing so. They should make sure that the information they use is complete, reliable, and clearly organized. Facts should be separated from opinions, and hard evidence from supposition.

### **Ways to Strengthen or Improve Identifying and Solving Problems**

- Develop your own step-by-step process for gathering and organizing data logically and in an ordered fashion.
- Generate or standardize a set of questions that will help you to collect all the information you need without any obvious gaps.
- Openly admit when there are gaps in the information you need, and ask questions whenever you are unsure.
- Guard against making assumptions or guessing about data or information if you have little or no factual evidence to back it up.
- Think longer and harder about the alternatives presented to you.
- Evaluate the reasoning processes that have been used to reach particular conclusions, and ask whether they have been sound, reasonable, and comprehensive.
- Avoid making hasty assessments or arriving at the easiest or most convenient conclusions when the issue is important or sensitive.



# MAKING DECISIONS AND WEIGHING RISK

Making Decisions and Weighing Risk refers to an individual's ability to systematically examine options; identify limits, outcomes, and risks to be considered; assign weights to each possible alternative; and then select the option that best meets the desired goals and standards.



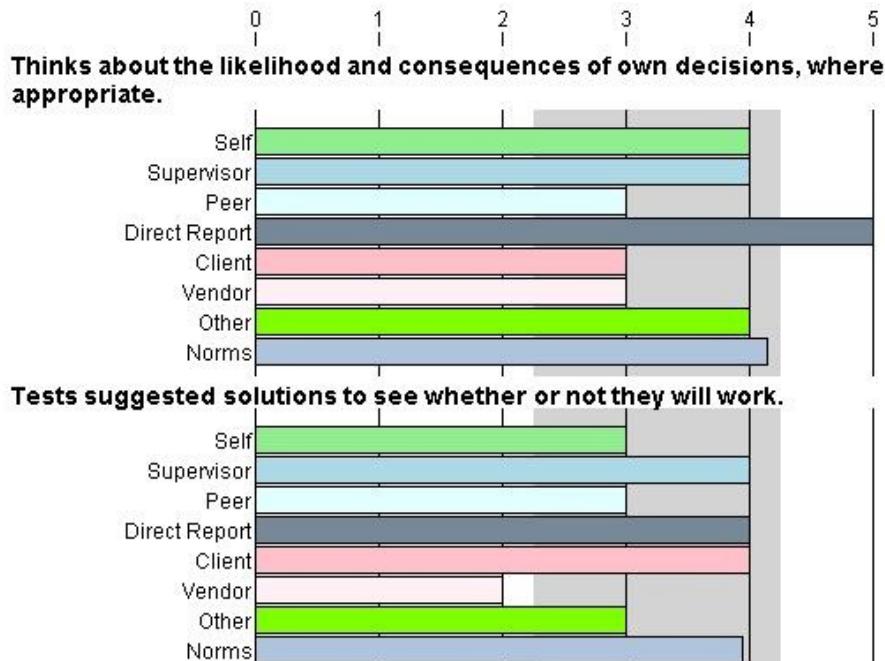
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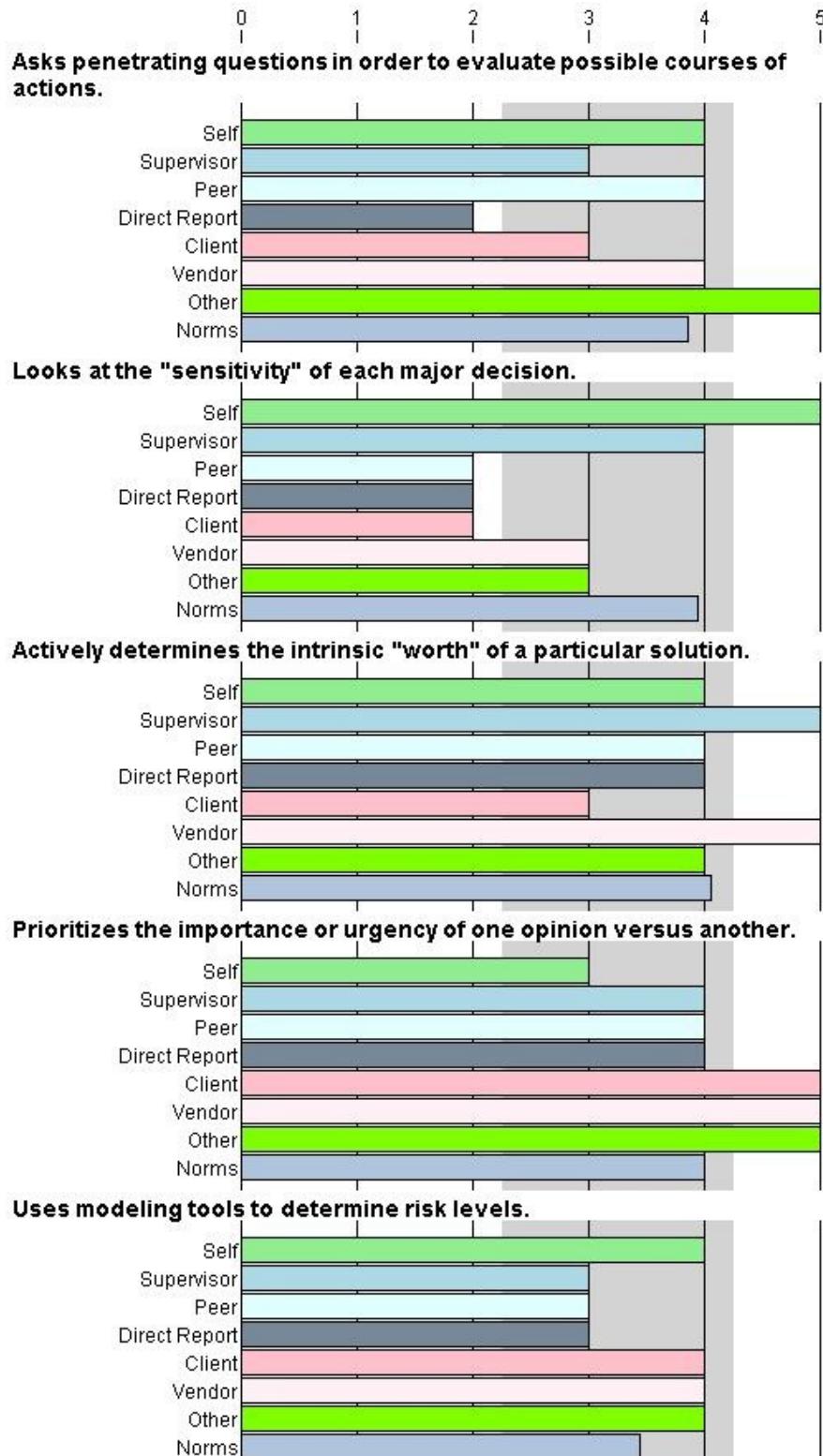
### LOW (less than 2.75)

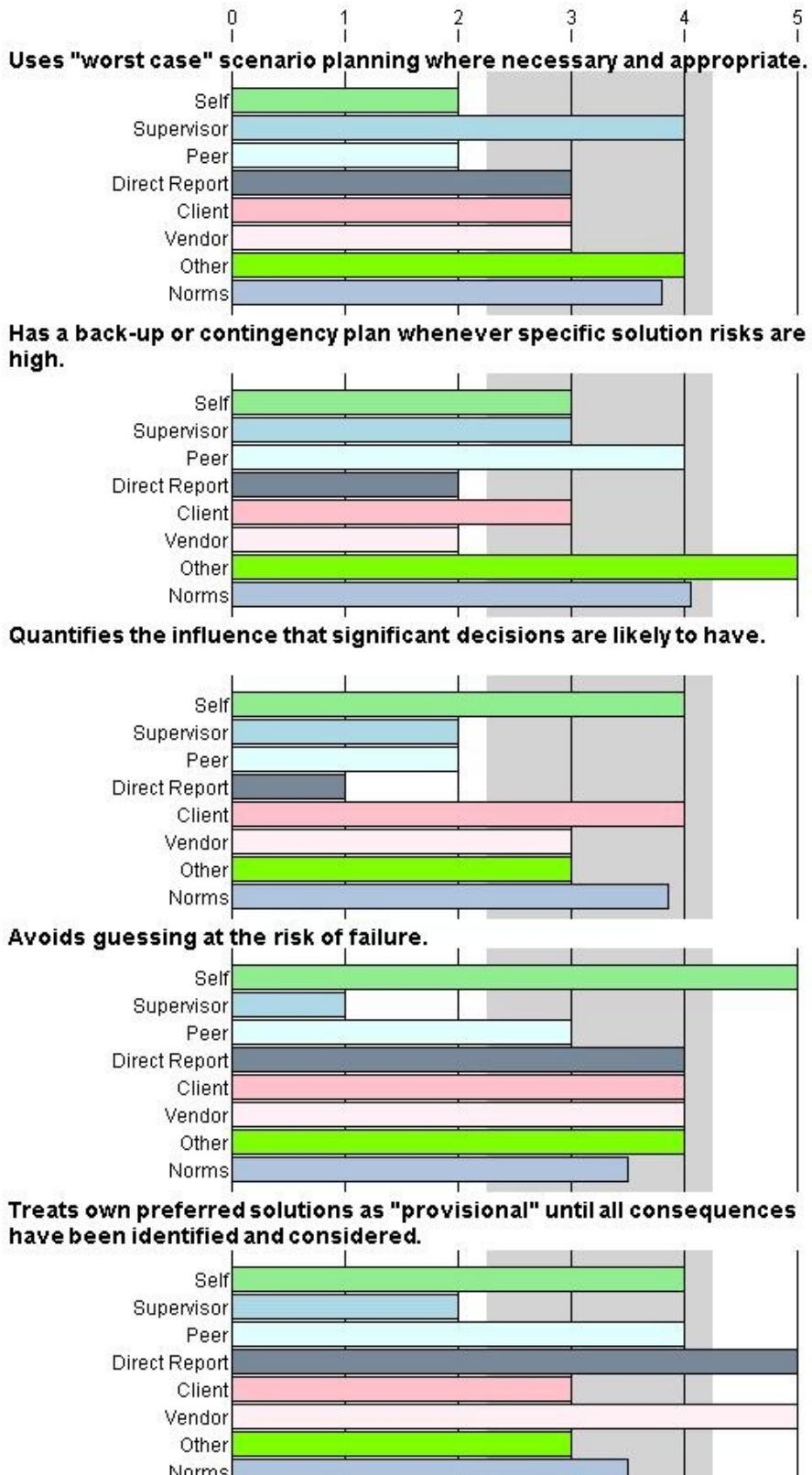
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that although you make dozens of small decisions with ease every day, you have difficulty with larger decisions that require the evaluation of many factors. A low scorer is likely to ignore consequential risk or impact or heavily underestimate any adverse consequences that might arise from a particular course of action. This person tends to start implementing a solution without adequate planning, and will either make unnecessary mistakes or discover new and unforeseen problems that will not be easily resolved.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you automatically consider the potential risks that exist for a chosen course of action or significant decision. You generally evaluate consequential impact as well as the likelihood of occurrence before finally deciding. A high scorer tends to evaluate ideas and strategies in terms of their potential future impact, but will also find ways to raise awareness of possible risks for others. This person is also likely to effectively point out any difficulties or problems that need more focus or effort to overcome them.







**Making Decisions and Weighing Risk** refers to an individual's ability to systematically examine options; identify limits, outcomes, and risks to be considered; assign weights to each possible alternative; and then select the option that best meets the desired goals and standards.

### **Recommendations for Overall Improvement**

Low scorers need to understand that all strategies carry at least some degree of risk. They should take more time trying to measure or calculate risk in practical terms. Where the risk is not obvious, low scorers should question the likely impact of decisions and what contingency plans have been put in place should something go wrong.

### **Ways to Strengthen or Improve Making Decisions and Weighing Risk**

- Think about the subject of risk from two perspectives: The likelihood that there will be a problem (and how frequently it might occur), and possible consequences and their severity. First think in terms of high, medium, or low risk, but develop this into a more discerning calculation system in due course.
- Design the criteria by which you are going to evaluate different options. Then write down all the alternative ideas or possible courses of action on paper, side-by-side.
- Learn how to use techniques such as a decision matrix, how to assign weights to these factors, and how to score each option (alternative) on each factor. This will help you greatly improve your performance.
- Review all of the comparisons to ensure that you make a sound decision as often as possible.
- Listen carefully and patiently until all the information being presented is complete. Then decide.
- Make sure that in all of your evaluations, you are comparing apples with apples, so that comparisons are fair and equitable.
- Before reaching a decision, evaluate the factual data and argue in your own mind the pros and cons of multiple courses of action. That will help you confidently reach a decision, present or propose it, and stick with it.
- To avoid "group think," require members of your work unit to research and argue the alternative viewpoint and play devil's advocate. It will bring about more understanding of the broader consequences.



# THINKING CLEARLY AND ANALYTICALLY

Thinking Clearly and Analytically refers to an individual's ability to apply logic and think analytically in order to accurately interpret situations and information before deciding what actions to take. This competency examines one's ability to identify valid premises and draw logical conclusions from them; separate fact from inference and assumption; use inductive and deductive logic effectively; and recognize fallacies, false premises, and generalizations that are based on insufficient evidence.



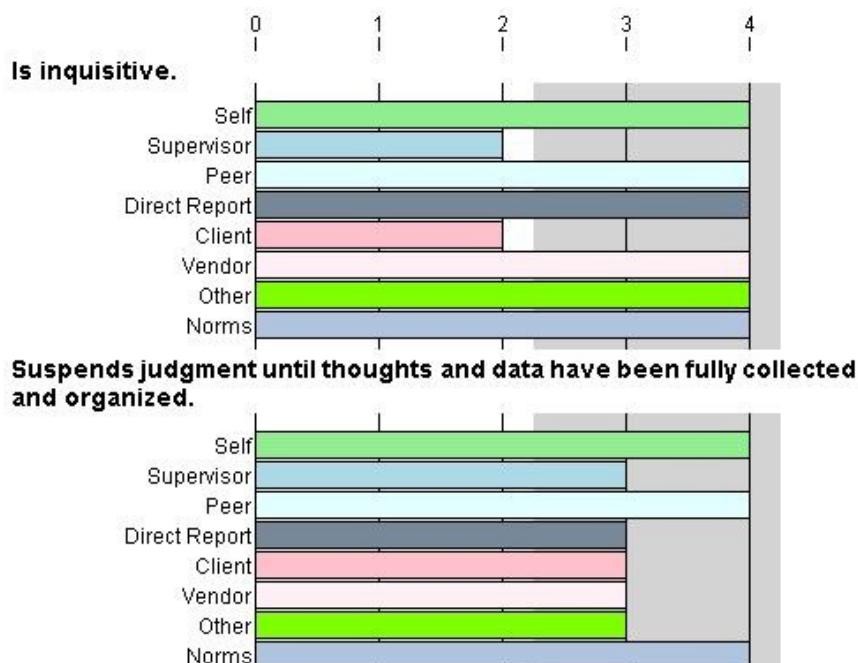
## Interpretation

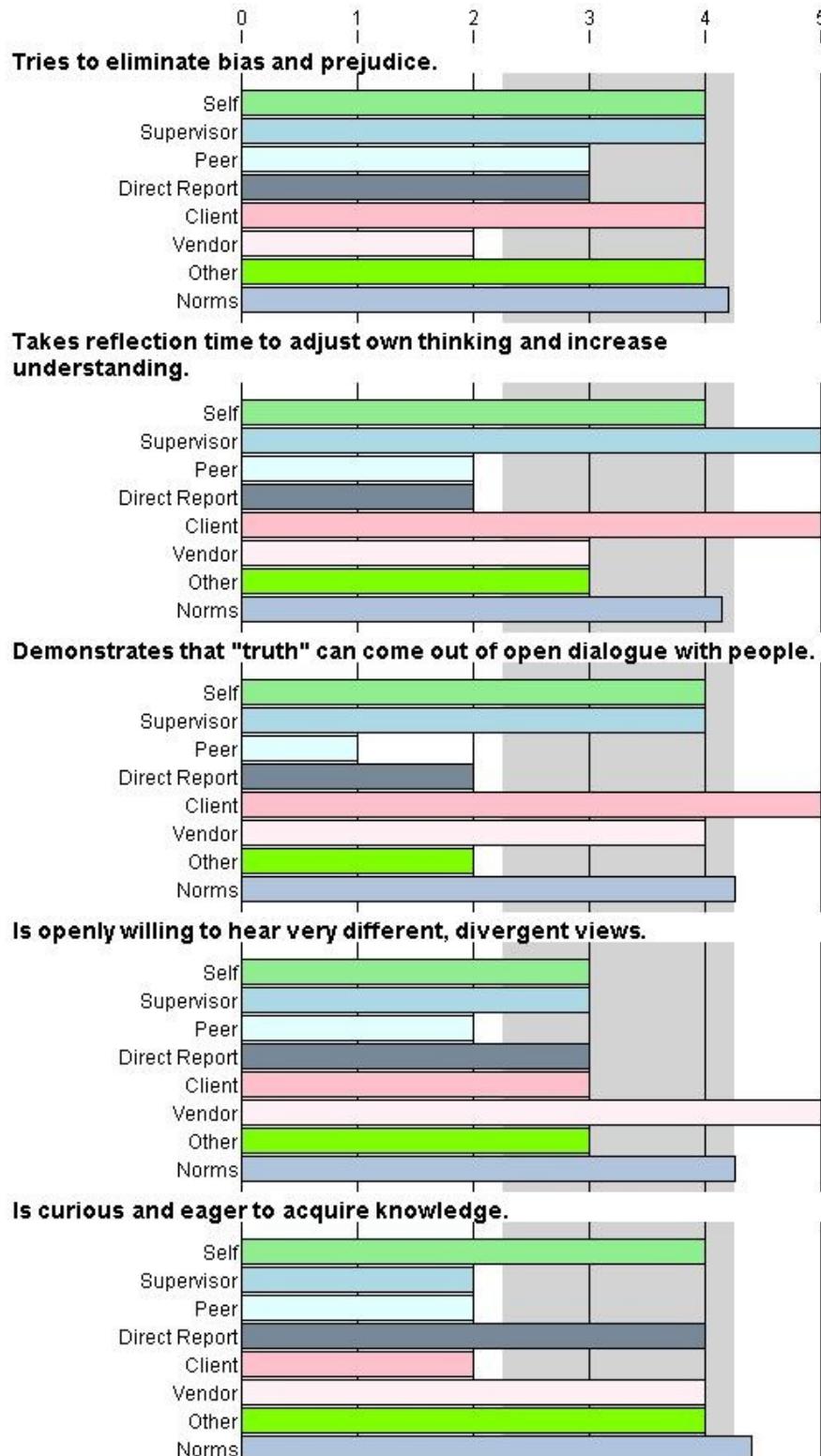
### LOW (less than 2.75)

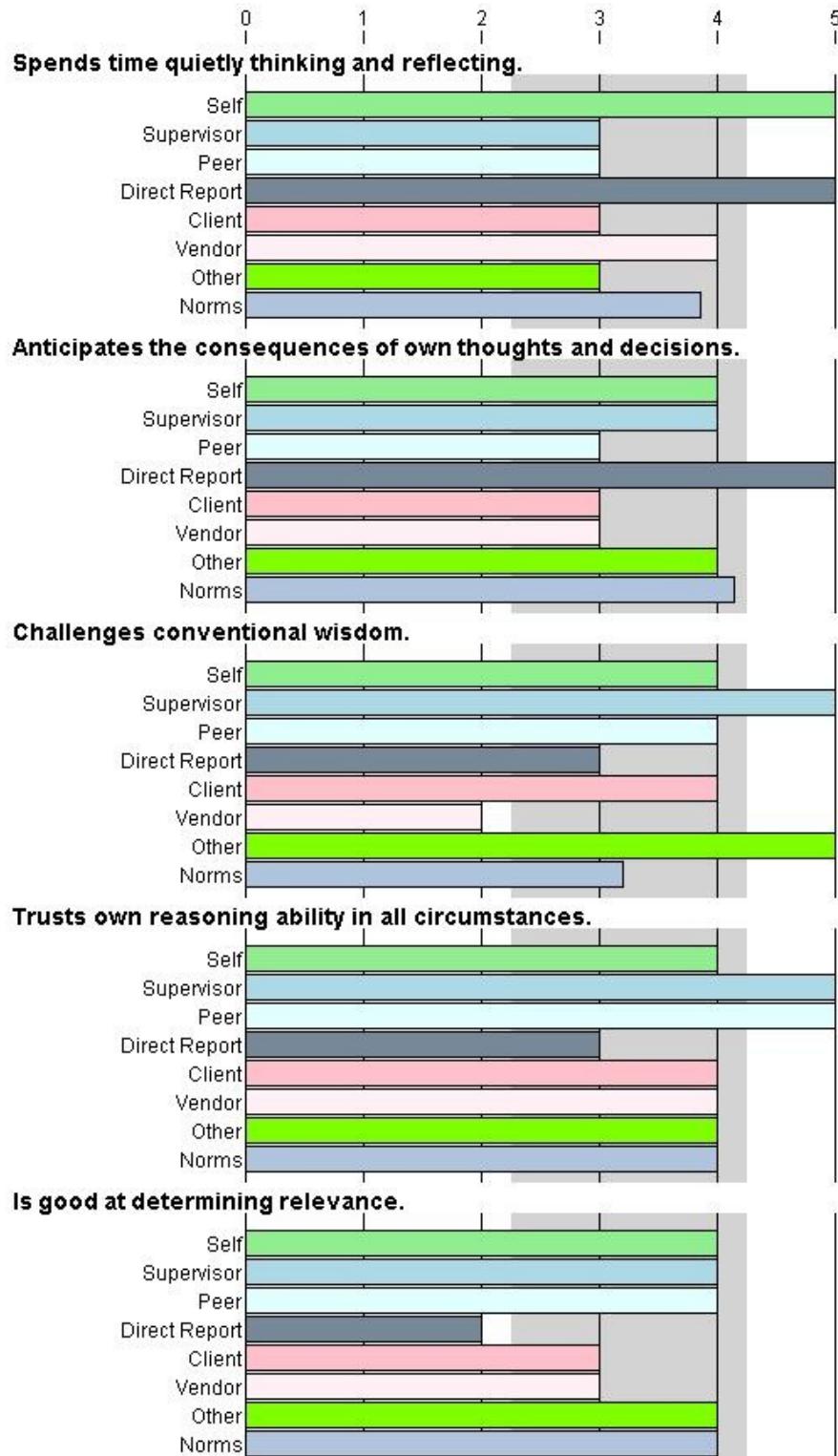
Response ratings predominantly in the ones and twos ("almost never" and "occasionally") suggest that you often accept information that looks good on the surface but that in reality is based on flawed logic. You generally fail to question statements that spring from faulty premises, inadequate information, and shaky conclusions. A low scorer tends to approach problems with relatively fixed views, hoping that solutions can be drawn from previous experience or practice. Low scorers are less likely to enjoy open discussions or loosely described situations or issues; they prefer to be told what the problem is about, and even where the solution might lie.

### HIGH (greater than 3.5)

Response ratings predominantly in the fours and fives ("very frequently" and "almost always") suggest that you are very confident about your own ability to approach difficult problems or challenges in a well-ordered and systematic way. You are likely to be comfortable with ambiguity and do not feel the need to find a quick or simple solution to a problem. A high scorer tends to be naturally curious and inquisitive about what makes the world tick. This kind of person is likely to enjoy thinking about complex or difficult issues and will spend a considerable amount of analytical and reflective time looking for clearer answers.







**Thinking Clearly and Analytically** refers to an individual's ability to apply logic and think analytically in order to effectively interpret situations and information before deciding what actions to take. This competency examines one's ability to identify valid premises and draw logical conclusions from them; separate fact from inference and assumption; use inductive and deductive logic effectively; and recognize fallacies, false premises, and generalizations that are based on insufficient evidence.

### **Recommendations for Overall Improvement**

Analytical thinking is a skill not usually taught in school, but it can be improved through training and development. Low scorers need to ask the question "Why?" much more frequently rather than accept information at face value. Low scorers should also seek out views that are different from their own, look for the significance of these ideas, and see if these diverse perspectives provide a more useful explanation or complete picture of what is happening.

### **Ways to Strengthen or Improve Thinking Clearly and Analytically**

- Practice mentally challenging what you see and hear, and try generating more than one interpretation or alternative to explain your experiences.
- Try to be less dogmatic in your views, and try to become more comfortable with ambiguity.
- Develop your curiosity by asking "how" and "why" as often as you sensibly can.
- Check your own thinking for any undue prejudice and bias when you are evaluating ideas or suggestions.
- Always consider the consequences of your ideas, opinions, judgments, and decisions, and then take time to reflect. This will improve the overall quality of your thinking.
- Design the criteria by which you are going to evaluate different options. Then write down all the alternative ideas or possible courses of action on paper, side-by-side, to see how they measure up.
- Listen carefully and patiently until all the information being presented is complete, before finally deciding.



# THE 10/10 REPORT

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## Top 10 Strengths

### Making Decisions and Weighing Risk

126 .Prioritizes the importance or urgency of one opinion versus another. 4.29

### Thinking Clearly and Analytically

143 .Trusted own reasoning ability in all circumstances. 4.14

### Making Decisions and Weighing Risk

125 .Actively determines the intrinsic "worth" of a particular solution. 4.14

### Counseling and Disciplining

104 .Offers direct and genuine assistance to individuals needing performance support. 4.14

### Identifying and Solving Problems

115 .Carefully specifies exactly what problem is to be solved. 4.00

114 .Separates "assumptions" from "hard evidence" when gathering information. 4.00

### Counseling and Disciplining

103 .Makes sure that employees accept full responsibility for closing any performance gaps. 4.00

### Appraising People and Performance

86 .Agrees to appropriate milestone points when tasks will be discussed. 4.00

### Giving Clear Information

60 .Avois using jargon, "gobbledygook," and inappropriate language. 4.00

53 .Able to get complicated ideas across clearly. 4.00

## Top 10 Development Needs

### Managing and Prioritizing Time

1 .Accomplishes most of his or her priorities, even when interrupted a lot. 2.43

### Giving Clear Information

57 .Changes and varies his or her communication style according to the situation. 2.71

### Making Decisions and Weighing Risk

130 .Quantifies the influence that significant decisions are likely to have. 2.71

### Giving Clear Information

58 .Finds the "right" words for the circumstances. 2.86

59 .Selects the most appropriate method to transmit his or her messages. 2.86

### Training, Coaching and Delegating

75 .Gently guides people, without imposing own views. 2.86

83 .Asks people to make suggestions and generate ideas of their own. 2.86

### Counseling and Disciplining

97 .Sets clear expectations about goals and targets. 2.86

### Identifying and Solving Problems

112 .Quickly separates cause from effect. 2.86

### Managing and Prioritizing Time

5 .Tends to start and finish scheduled activities or events of the day on time. 3.00



# COURSE AND READING SUGGESTIONS

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Here is a link to a 12 page workbook that can help you further

<http://assessments24x7.com/rsb/RSBIs.pdf>

The following are general reading and course suggestions that may help you to better understand the two categories in which your scores were the lowest and to assist you in writing your development plan.

## Training, Coaching and Delegating

Training, Coaching, and Delegating refers to an individual's ability to develop people; select the right people; reach agreement on plans for action; keep a balance between input and output; transfer responsibility to the employee; provide feedback effectively; and appropriately reward good performance.

### Reading Suggestion

- The Management Guide to Delegating (The Management Guide Series). Kate Keenan, and Anne Taute (Editors): Ravette Books

### Course Suggestion

- Coaching Other People
- Empowering Others
- Trainer Skills
- Building Trust and Empathy
- Delegation Skills

### Other Suggestion

- Complete the "Coaching Effectiveness Profile". Jon Warner, Ph.D.: HRD Press
- If you feel comfortable doing so, talk to your direct supervisor/manager or a training and development specialist about personal training, coaching, and specific projects, and other possible support they may be able to offer to improve your skills.

### Reading Suggestion

- The Complete Guide to Coaching at Work. Perry Zeus and Suzanne Skiffington
- Masterful Coaching Fieldbook. Robert Hargrove
- Train-the-Trainer Workshop. Penny Ittner and Alex Douds: HRD Press
- The Competent Leader. Peter Stark and Jane Flaherty: HRD Press
- SkillBuilder™ Booklets: Effective Coaching Skills/ Delegation Skills. Jon Warner, Ph.D.: HRD Press
- One-Page Coach: Effective Coaching Skills Workshop. Jon Warner, Ph.D.: HRD Press
- 50 Activities for Coaching & Mentoring. Donna Berry, Charles Cadwell, and Joseph Fehrmann: HRD Press
- Complete Mentoring Program. Dr. Norman Cohen: HRD Press
- Coaching, Mentoring and Managing. William Hendricks, Sam Bartlett, and Joe Gilliam (Editors): Career Press
- Stop Managing, Start Coaching!: How Performance Coaching Can Enhance Commitment and Improve Productivity. Jerry W. Gilley and Nathaniel W. Boughton (Contributors): Irwin Professional Publishing
- Delegating for Results (Fifty Minute Series). Robert B. Maddux: Crisp Publications

## Setting Goals and Standards

Setting Goals and Standards refers to an individual's ability to manage activities and projects using measurable goals and standards and working with others to set goals and standards to develop understanding and build commitment. This competency looks at one's ability to evaluate and prioritize goals, intentions, and action standards; eliminate barriers to the goal-setting process; evaluate goals against criteria and standards; and use goals to motivate.

### Course Suggestion

- Developing Effective Targets
- Managing by Objectives
- Selecting Appropriate Courses of Action
- Developing Clear and Meaningful Written Goals
- Motivating People Through Effective Goal Setting

**Other Suggestion**

- Complete the "Goal Setting Effectiveness Profile". Jon Warner, Ph.D. Available as a paper and pencil and on-line assessment.
- If you feel comfortable doing so, talk to your direct supervisor/manager or a training and development specialist about personal training, coaching, and specific projects, and other possible support they may be able to offer to improve your skills.

**Reading Suggestion**

- High Performance Goal Setting : Using Intuition to Conceive and Achieve Your Dreams. Beverly Potter
- SkillBuilder™ Booklet: Effective Goal Setting. Jon Warner, Ph.D: HRD Press
- One- Page Coach: Effective Goal Setting Workshop. Jon Warner, PhD: HRD Press
- Motivating Employees. ITC, Inc. Video-based workshop
- Motivation and Goal Setting: How to Set and Achieve Goals and Inspire Others (Motivation and Goal Setting). Jim Cairo: Career Press
- The Magic Lamp: Goal Setting for People Who Hate Setting Goals. Keith Ellis: Three Rivers Press
- Daily Plan-it: The Pursuit of Goals. Chris Mackey: Roadside Press
- The Agile Manager's Guide to Goal-Setting and Achievement (The Agile Manager Series): Walter J. Wadsworth
- Goals and Goal Setting (Fifty-Minute Series). Larry A. Rouillard: Crisp Publications
- Make Success Measurable!: A Mindbook-Workbook for Setting Goals and Taking Action. Douglas K. Smith: John Wiley & Sons



# DEVELOPMENT PLAN

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Use the space below to write out your personal development plan for the next 12 months based on your results. Draw upon the general improvement actions in relevant areas of the report, and ideas that are suggested in the attached coaching tips.

**Accomplishes most of his or her priorities, even when interrupted a lot.**

Score: 2.43

**Action to Take:**

**Changes and varies his or her communication style according to the situation.**

Score: 2.71

**Action to Take:**

**Quantifies the influence that significant decisions are likely to have.**

Score: 2.71

**Action to Take:**

**Finds the "right" words for the circumstances.**

Score: 2.86

**Action to Take:**

**Selects the most appropriate method to transmit his or her messages.**

Score: 2.86

**Action to Take:**

## Managing and Prioritizing Time

**Try to accomplish all or your priorities, even when you get interrupted.**

Life is full of interruptions. Try to get through an entire hour without at least one interruption, let alone an eight-hour workday. It's practically impossible! But if interruptions are a form of chaos in our planned universe, shouldn't we at least try to minimize the damage they cause? There must be a way to accomplish our priorities in the midst of routine interruptions.

Here are some helpful suggestions:

1. When a person says "Got a minute?" don't accept their time estimate. Ask them to estimate how long it will take, and then hold them to it as far as possible. If the matter can be handled in a short time and it is not going to distract too much from the priority task you are currently working on, then do it. Otherwise, set up another time.
2. Make sure that the "language of priorities" becomes part of the workplace culture. That way, when someone wants to interrupt, you can tell the person about the priorities you currently have, and the two of you can make a reasoned judgment about whether their problem has a temporarily higher priority than your work. This way, the other person is less likely to be offended if you cannot accommodate them.
3. When someone wants to interrupt, ask for a few seconds' grace. Perhaps they can help themselves to a cup of coffee or gratefully use the time to gather their thoughts and possibly their paperwork. In that few seconds, scan the work you have been working on and mentally summarize what you have learned or done up until that point. If necessary, jot down a few notes about what you need to do when this interruption is over.
4. Be disciplined about your priorities. No matter how major or how distracting an interruption has been, be committed to picking up where you left off. Use a forklift or use tweezers, but commit yourself to going back and picking up the threads that have been dropped.
5. If interruptions are a long-term structural problem for you, impeding your ability to get significant things done, carefully analyze why this is the case and make some structural changes. Turn your desk or chair around away from the corridor, shut your door more often (if you have a door), and ask colleagues not to interrupt you.

## **Giving Clear Information**

### **Vary your communication style, according to the situation.**

One of the keys to great communication is to be able to flex your style according to the situation. Here's how to do it:

#### **1. Determine which of the following styles of communication the audience prefers:**

- formal
- informal
- official language
- colloquial/regional language
- technical language
- layperson's language
- entertaining approach
- factual approach
- all graphics and no print (presentations, not reports)
- all print and no graphics (reports, not presentations)

It might be somewhat difficult to find this out beforehand, but try anyway. Be ready to subtly segue into something else if the audience becomes restless.

#### **2. What do they want you to be? What do they expect you to be?**

- Parental figure?
- All-round good guy?
- Remorselessly
- Head-office hit person?
- thorough technocrat?
- The bearer of ill
- tidings?
- The bearer of good tidings?
- Entertainer?

Like it or not, the communicator has an important role to play. Determine whether you will give them what they want or expect, what you want or expect, or something in between. You might not be great at changing roles or changing hats, but that is not necessarily a bad thing. The main thing here is to be aware of the smorgasbord of possibilities.

#### **3. One of the ways in which you can improve your flexibility approach is to work with someone else or split the presentation up into parts.**

- Try doing a formal presentation with others.
- Consider briefing a meeting, having made prior arrangements for others to cover their areas of specialty.
- Talk to a person one-on-one, and then refer them to some print material, or promise to send them some.

#### **4. Where appropriate, behave differently to different audiences. Just remember that one person's flexibility and customization is another person's duplicity and manipulation. Never presume that someone in one audience won't compare notes with someone from another audience. Be honest with them all and be sure not to contradict yourself.**

## Making Decisions and Weighing Risk

### **Quantify the influence that each significant decision is likely to have.**

Every problem creates some dislocation or inconvenience to individuals in order for it to qualify as being a problem in the first place. As a result, choices or decisions have to be made that try to change the circumstances in a way that can improve the situation.

Where problems are about issues that don't involve people (the car will not start or the VCR will not work, etc.), there is little adverse consequence to be considered. However, if the problem is about people-related issues (an individual refuses to talk to me or the team, is under-performing, etc.), the potential solutions or remedies will almost always have consequences for a range of individuals: the people offering the solution, the object or target of their efforts, and often other individuals or groups who are close to either of these. Wherever people-related problems are considered, it is extremely important to quantify the influence that decisions about problems are likely to have before they are implemented. This is particularly important when the decisions are significant in size or range of impact on an organization.

Here are some good strategies:

- 1.** Separate potential solutions into those that are likely to have: no consequence, some consequence, or many consequences on people.
- 2.** For those solutions and decisions that are likely to influence people in some way, list the specific ways in which the solution will impact them.
- 3.** Rank the different impacts in terms of those with the greatest influence first and the least influence last.
- 4.** Try to quantify the greatest influences in terms of the dislocation, inconvenience, or negative consequences the solution can create.
- 5.** Assess whether the overall dislocation or inconvenience is less or is greater than the potential benefits from the proposed solution or decision.
- 6.** Evaluate whether any adjustments or changes can be made to the proposed solution in order to lessen the negative influence of solutions or decisions, particularly when they are large or significant in size and scope.

## **Giving Clear Information**

### **Find the right words for the right circumstances.**

French novelists often wrote about finding “le mot juste”—the right word. Some writers and poets spend an entire day searching for just one word. You don’t have that kind of time, and it probably would be a waste of time anyway. Some situations call for extreme sensitivity and tact. Effective communicators always manage to find the right words for the circumstances. Here are a few ideas on how to do it:

**1.** Learn to collect words. Know about technically precise words, colloquial words, slang words, regional words, the latest buzz words, or trendy jargon. Pull them out when they’re appropriate.

**2.** Learn about the subtleties and shades of meaning in words. A thesaurus gives the following words as alternative words for “incompetent”: blundering, unfit, careless, inadequate, untrained, unskilled, unqualified, negligent, sloppy, clumsy, inexpert. Notice the differences in meaning. Use one word in one setting and it might be refreshingly blunt, cutting to the heart of the problem and moving the situation into problem-solving mode. Use the same word in another setting and you might have a lawsuit on your hands. The best decision might have been to use another word entirely. There is a world of difference between “negligent” or “blundering” and “untrained” or “unskilled.”

Hit the thesaurus. Better to put in the time beforehand than realize that you chose the wrong word as you nurse a black eye, wipe the egg off your face, or ponder a lawyer’s letter.

**3.** Use the first-person pronouns of “I” and “we” instead of “you.” First-person pronouns are inclusive. They show that you are on the side of the other person (“*Let’s look at this from another point of view*”) or have been down this path before and are a fellow traveler and sufferer (“*When I had to learn this, I just felt despair*”). “You” can sound too much like an accusation. (“You need to get this under control, pronto.”) Second-person pronouns are not inclusive, but excluding.

**4.** When things go wrong, by all means, use some sensitivity. If you don’t, the person who has made the mistake can become defensive, and you might then get locked into a yes, you did/no, I didn’t spiral. A useful tool for sensitivity is the passive verb. Instead of saying “You’ve made a mistake here,” try “*There’s a mistake here.*” You can soften the impact of words even further by:

- Using qualifier or modifier words
- Placing the situation in a more general context so that a mistake becomes less prominent

Applying these rules, we get an even softer reprimand: “*There appear to be some mistakes here in the department’s forms.*” To get people to change and do better, you have to help them save face and find their own solutions.

## **Giving Clear Information**

### **Find and select the most appropriate way to communicate your message.**

There's more than one way to skin a cat, and there's more than one way to win a chat. Effective communicators make it their business to know which medium suits which message. Try these strategies:

#### **1. Write someone rather than to speak to them when ...**

- You need a permanent record.
- You need to be sure that everyone gets exactly the same message.
- You need to state a complete case without being interrupted.
- You need to keep your cool.
- It is inconvenient or difficult to speak to the person.

#### **2. Speak rather than write when ...**

- You want instant two-way communication, rather than delayed two-way communication.
- You want one change of ideas and information, which might trigger new thinking.
- You want to encourage "off the record" frankness.
- You don't have time to write.

#### **3. Set up a formal meeting rather than write or use oral methods of communication when ...**

- You want a structured ritual to process decision-making, feedback, and conflict management.
- You want a formal process and time pressure to force closure on an issue.
- You want a situation where everyone observes the norms of conversational pacing and the sharing of airtime.
- You want a formal record kept.
- You want to observe non-verbal behavior.

#### **4. Set up an informal rather than a formal meeting or write or use the telephone when ...**

- You want to avoid the pressure to reach a decision—any decision, no matter how premature or hare-brained.
- You want to canvass less conventional options.
- You want to minimize ritual posturing and rhetoric, and encourage candor.

- You want to neutralize office politicians who revel in meeting tactics.
- You want to put together a deal without participants having to go on record and/or lose face.

**5. Use the telephone rather than write or schedule a meeting when ...**

- You haven't got time for meetings.
- Meetings will be too expensive (e.g., distant geographies).
- When it is not necessary (and perhaps undesirable) to have more than a few people present.
- You want to do the ground work for actual meetings (defining issues, establishing rapport, obtaining background information, setting agendas).
- Your transactions with the other person are routine and repetitive.
- You and the other person know each other quite well.