



# Early Identifier

A Manager's Guide to Unleashing Leadership Capabilities



## WHAT WILL I LEARN IN THIS GUIDE?

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This guide prepares you to facilitate honest, insightful discussions about a person's assessment results. You'll be equipped with best practices to prepare for discussions, interpret results, and create personalized development plans to expedite people's readiness for a leadership role. Sections include:

1. [WHY ASSESS LEADERSHIP CAPABILITIES?](#)
2. [HOW DO I INTERPRET THE RESULTS?](#)
3. [WHAT'S MY ROLE?](#)
4. [APPENDIX](#)

### > How Do I Avoid Common Pitfalls?

Many managers hesitate to share candid feedback and discuss development because they lack experience and confidence. At the same time, employees want more of these discussions. In fact, a survey of 10,000 frontline leaders found:

- 56% don't have up-to-date development plans.
- 37% don't have a supportive manager.
- 53% want more coaching from their manager.
- 55% want more challenging development assignments.

This guide calls out common pitfalls and offers tips for managing these challenging situations. Using this guide, you'll build the confidence and competence to lead individuals through authentic and productive discussions.

# 1. WHY ASSESS LEADERSHIP CAPABILITIES?

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Your organization is committed to using a data-driven approach to **surface, activate, and accelerate** leadership capabilities earlier in careers, and you're critical to its success. Why is this approach important? Organizations face a major leadership shortage. Year after year, they report their struggle to get leaders ready for the challenges ahead. Organizations can reach their potential only when they unleash the full power of leadership across all levels. The complexity and rapid pace of 21<sup>st</sup> century interconnected work requires that more people be ready earlier to step up to leadership roles.



**Surface**—Build awareness and target development early in people's careers. Look broadly across the organization for untapped leadership interests and capabilities.



**Activate**—Increase self-insight with transparent feedback, set realistic expectations, and encourage people to take ownership of development and advocate for what they want.



**Accelerate**—Take targeted risks to engage people in development opportunities with growth tension to stretch their strengths and enhance their development areas.

## > What Will I Learn About My People?

This assessment measures early leadership capabilities through personality questionnaires and simulated leadership challenges. It offers people a realistic preview of mid-level leader jobs by asking them to play that role in a fictitious company. The results provide unbiased, calibrated ratings and personalized guidance for development that encourage individuals to take personal ownership to heart. You'll get a holistic view of the personality and skills that facilitate or inhibit a person's long-term growth.

### Pitfalls

**Casting a narrow net**—Instead, think broadly and be inclusive when searching for future leaders. Take a fresh look across your organization to uncover hidden capabilities.

**Differing ideas about what leadership looks like**—Avoid thinking “I’ll know it when I see it.” Study the personality and skills in this guide to gain agreement on what makes a great leader.

**Focusing on one or two characteristics to identify future leaders**—Look beyond the usual skills, such as communication and technical knowledge, to discover unrecognized capabilities. Consider a spectrum of personality and skills. Exceptional leadership has many facets.

## 2. HOW DO I INTERPRET THE RESULTS?

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### > Framing the Assessment Experience

The assessment captures indicators of a person's **future** (rather than current) leadership capabilities, so be both sensitive and candid when discussing results. Present this discussion as an opportunity to gain insight so the person can take action now to develop future capabilities. Understanding these indicators early is essential for targeting development.

Most people won't have all the skills early in their careers and that's okay. Also, great leaders exemplify a variety of personality differences, not one ideal profile. The most value comes from the insights and actions following the assessment as you help the person relate the results to your observations and to future work opportunities. Express confidence in the person's ability to grow.

To optimize the person's motivation, ensure you meet his or her personal needs in this discussion.

#### Key Principles to Help You Meet Personal Needs



##### 1. Maintain or enhance **self-esteem**.

Help others feel respected and appreciated by sincerely acknowledging their ideas, contributions, progress, and achievements. Leaders who enhance employees' self-esteem promote job satisfaction, performance, loyalty, and trust.



##### 2. Listen and respond with **empathy**.

Listen beyond the words being said for underlying feelings. Then, respond to both the facts and the emotions to encourage continued sharing. Empathetic leaders tend to be better coaches, and their employees are more engaged and less fatigued or anxious.



##### 3. Ask for help and encourage **involvement**.

People want to feel involved and know that their ideas and opinions matter. More participative leaders increase commitment by offering employees variety, autonomy, and influence in their jobs. As a result, employees report more satisfaction, trust in management, and self-confidence.



##### 4. **Share** thoughts, feelings, and rationale. *(to build trust)*

Disclose your thoughts, insights, and the reasons behind your recommendations to build trust. When you open up, you encourage others to do the same. Transparency in leadership enhances work effectiveness, employee satisfaction, and innovation.



##### 5. Provide **support** without removing responsibility. *(to build ownership)*

Manager support is critical for development. Avoid removing task ownership—this is how people grow and build confidence. Effective managers delegate, offer support without taking over, and coach to support success.

## > Measuring Personality and Skills

### Personality

Personality, a person's traits and motivations, focuses on individual differences that influence how people think, feel, and behave when facing leadership challenges. As roles become more complex and demanding, personality may become a more significant determinant of acceleration and success. Why? Leadership requires stretching capabilities into untested areas, dealing with complexity, and facing unexpected challenges.

The EI includes measures of personality constructs that have been found to influence individual's growth and acceleration into leadership. When interpreting personality scores, keep in mind:

- High or low scores can represent benefits or risks depending on the situation or role. For example, a high score in Collaborative Orientation could be beneficial in roles that depend on others' outputs. In more independent roles, too much collaboration could waste time.
- Your job is to help the person gain insight into his or her personality, so the person can anticipate how he or she might respond to certain leadership situations.
- Examples will help people see how work behavior relates to these traits. For example, you could point out that someone low in Assertiveness might be hesitant to speak up even when he or she has a great idea.

### Development Approach

Personality traits and motivations help to identify risks an individual might face as a leader. Personality is difficult to change, so your job is to focus on helping the person adopt new habits based on the insights gained to avoid the risks. Great leaders learn to manage their traits early in their careers.

- Understanding personality helps you anticipate areas of leadership that come naturally for the person and areas that will require more effort.
- Personality areas also can clarify the types of roles that will be a good or poor fit. Help the person adapt career choices, work environments, and routines to increase job satisfaction.

## **Skills**

Skills relates to the capability of combining declarative knowledge (i.e., knowing what to do), with knowing how to effectively perform a task. Ideally, the best way to assess skill is to observe one's behavior. However, because participants are not expected to portray effective leadership behaviors yet, the EI assesses whether participants can identify the appropriate actions to situational leadership challenges. When interpreting skills scores, keep in mind:

- High scores indicate areas in which a person is ready for opportunities to leverage skills.
- The higher the score, the more effective the skill.
- Low scores indicate that a person has inaccurate assumptions about effective leadership.

## **Development Approach**

Developing skills is more straightforward than developing personality.

- To develop a low-rated skill, a person needs foundational knowledge, examples, and coaching.
- Managers should clarify false assumptions and identify opportunities for people to learn new skills.
- Offer opportunities to develop skills through formal training, watching others, experimenting with new approaches, and getting feedback on performance.
- Skills develop quicker when a person focuses on a specific skill and evaluates progress often.



## Pitfalls

**Misinterpreting results**—Results are informed by the participant's responses to the Early Identifier items and compared against others who previously completed this assessment. For example, a high score does not mean that you had a high number of "correct" scores. It just means that compared to others, you scored higher than average as compared to those who have previously completed the test. Also, remember that a high personality score can be considered a benefit or a risk depending upon the leadership situation.

**Assuming there's one successful personality type**—Look beyond stereotypical characteristics to include more diverse leadership styles.

**Looking at results in a vacuum**—Results should be integrated with other information, such as past performance, previous feedback on leadership skills, future work responsibilities, and organizational business challenges. These sources provide context and might agree or disagree with scores. Treat **disagreements** as opportunities for deeper discussions.

**Failing to provide perspective on results**—Some participants might overreact to results and be concerned about the impact of the report on career opportunities. Always clarify the purpose of the assessment, the benefits, who will see the report, and how results will be used for targeting development. Empathize and address any concerns.



### 3. WHAT'S MY ROLE?

#### > The Manager as Mentor

To learn the most from this experience and their results, participants need a mentor to:

- Help them understand the report.
- Support their commitment to improve in areas that need development.
- Create opportunities to accelerate growth in areas of strength.
- Recommend techniques to manage personality traits that can undermine performance.

The left column shows examples of what good mentors do before, during, and after the discussion of the results. The right column shows how great mentors invest even more effort.

#### BEFORE THE DISCUSSION

##### Good Mentors . . .

- Read a person's report so they're prepared to help interpret the scores.
- Note a few specific topics to focus on.

##### Great Mentors Go Beyond to . . .

- Think about how the results relate to the person's current role and future goals.
- Look for themes and prepare questions to help the person think through the report results in more depth.

#### DURING THE DISCUSSION

##### Good Mentors . . .

- Clarify the assessment purpose, benefits, and how results are used.
- Ask how the person feels about results (surprises, agreements, disagreements).
- Are sensitive to the person's possible disappointment with some scores.
- Put a positive spin on data.
- Focus on actions to improve.
- Offer resources, advice, and lessons learned, and suggest development actions.

##### Great Mentors Go Beyond to . . .

- Provide specific examples of actions observed that are consistent or inconsistent with the report data.
- Relate assessment results to future work responsibilities and leadership challenges the organization will face.
- Empathize with negative emotions and share personal career challenges they have faced.
- Encourage candor about improvement areas and express confidence in the person's ability to improve.
- Ask about opportunities and barriers the person might face when trying to develop.

## DURING THE DISCUSSION

### Good Mentors . . .

- Ask the person to set a few development goals for the next year.
- Recommend books and readings to help a person create goals.

### Great Mentors Go Beyond to . . .

- Set up a follow-up meeting to determine two or three development goals to focus on in the next three months.
- List short- and mid-term opportunities to reinforce leadership skills and manage personality traits.

## AFTER THE DISCUSSION

### Good Mentors . . .

- Regularly ask the person about development progress and provide feedback.
- Invite the person to meetings that help him or her learn more about the organization and its leadership.
- Continue seeking and recommending new learning opportunities.

### Great Mentors Go Beyond to . . .

- Ask often what changes the person has made and how changes affected outcomes.
- Collect feedback from others and encourage the person to do the same. Discuss how others see this person's strengths and development needs.
- See if metrics are met and are challenging.
- Ensure positive results in business outcomes also lead to progress in leadership skills.
- Give the person responsibility for important projects that will stretch capabilities.
- Support the person until he or she becomes comfortable with new responsibilities.
- Help the person build an internal and external network to jump-start development goals and activities.

## > Creating a Development Plan

This assessment has given your employee an early opportunity to develop. With your help, the person will be better prepared when it's time to step into a new leadership role.

Development Planner

☒ Build on a strength

What are some specific strengths you learned about from your Early Identifier Report?

How will your growth add value to your career goals? How will growing in this area help your team and organization?

What are potential barriers to using these strengths on the job?

Support the person in creating a **Development Action Plan** using the **Development Tools** available from the Early Identifier menu.

1. **Prioritize two or three areas** from the assessment that this person should focus on to make the biggest difference in achieving his or her career goals. This could be leveraging a current strength or improving a development area. Balance the individual's needs for development with the organization's and work group's priorities to ensure the highest relevance of development goals and actions.
2. **Use the Development Guides** to select high-impact development activities to include in the plan. Development Guides are accessible from the Early Identifier participant report. There are two development guides for each personality and skill area—one targeted for high scores and one for low scores. The plan should include details about what this person will do differently, opportunities he or she will pursue, how progress will be measured, deadlines, and contacts who can provide support. Summarize decisions and commitments and express confidence in the person's success.
3. Urge people to **disrupt routines** and leave comfort zones. To make changes, the individual needs to adapt his or her approach to work tasks and interactions. A different environment pushes the person to learn new skills and habits.
4. **Identify new challenges** that will force the person to develop new skills. Encourage the person to search for projects that present challenges in areas he or she wants to develop and to make the desire for more responsibility clear to others.
5. Support the person in **seeking feedback** from others who work with him or her (including peers, internal and external customers, and direct reports). Feedback is essential when experimenting with new approaches. Press for honest and specific examples to clarify improvements and areas in need of more effort.

## > Taking Smart Risks on People

You play a critical role in accelerating development opportunities. This involves taking risks on people by sharing greater responsibility for important projects and creating an environment in which people know they can take bigger chances because mistakes are embraced as learning opportunities.

This is easier said than done when you feel overtaxed and in perpetual transition. The more uncertain the environment, the more hesitant you might be to delegate, but, if you don't take these risks, then the organization won't have the leadership needed to face challenges and individuals won't achieve their aspirations.

### Stretch Assignments

Some suggested activities in the Development Guides focus on observing and seeking advice from experts. Others involve trying new approaches within a person's current role. The most challenging activities are **stretch assignments** recommended for those who have strength in a skill or personality area. These assignments are the most effective way to accelerate growth.

When setting up assignments, create safe practice opportunities that also stretch capabilities. It's a fine balance. Tailor the depth of your coaching to the individual's skill level, task difficulty, and risks involved.

#### STRETCH ASSIGNMENT EXAMPLES

- Lead an initiative intended to improve failing team performance.
- Assist a less-experienced leader in structuring and executing a project plan.
- Offer to mentor someone who wants to gain the trust of a new work group.
- Train someone in a process or skill in your area of expertise. Create a plan to help that person develop the skills to take on related tasks and responsibilities.
- Designate a team meeting to scan the environment for emerging threats, obstacles, ideas, or opportunities that could affect your work group's results.
- Develop a plan and then find opinions or information that conflicts with your approach. Determine whether there is data to support those points of view.
- Become proficient in SWOT (identifying strengths, weaknesses, opportunities, and threats). Present your results to stakeholders from diverse perspectives and use their feedback to understand systemwide trends and global issues.

## > Providing Ongoing Support that Matters

Unleashing leadership capabilities takes time. Employees need long-term mentors to provide continued encouragement, resources, and coaching. They also need them to advocate for their career growth by providing opportunities that develop and leverage their capabilities. Your support can greatly accelerate or slow progress.

- **Specificity that matters**—Be a supportive manager, not a micromanager. Offer coaching to prepare people for challenges and then give them freedom to experiment.
- **Feedback that matters**—Communicate feedback that includes specific examples and offers suggestions for alternative approaches.
- **Application activities that matter**—Encourage the person to find meaningful assignments. Plan a series of escalated opportunities.
- **Stories that matter**—Share expert tips, personal failures, lessons learned, network contacts, and best practices. Use daily observations as opportunities to share advice.

Revisit the person's growth. As he or she experiences improvements in an area, review the Early Identifier report and recommend places for the person to refocus attention and development efforts. Schedule regular updates to provide feedback and share insights so the person will stay engaged and motivated on this long, exciting journey.

### Pitfalls

**Managers owning the process**—Your role is to facilitate discussions and expedite development. The individual owns the development goals, actions, and results. Consistently encourage personal ownership and self-advocacy.

**Individuals not knowing when to step up**—Some people are motivated and capable of taking on more responsibility but don't want to overstep boundaries of authority. Be clear that you welcome this initiative. It's natural to feel threatened when others ask to share your responsibilities, but the more you delegate, the more you can focus on other priorities.

**Delegating for development vs. dumping**—It's tempting to misuse stretch assignments as opportunities to cover responsibilities no one wants. Delegate responsibility to progress development not to cover undesirable tasks.

## 4. APPENDIX

### > Personality vs. Skills

	Personality	Skills
<b>Definition</b>	Traits and motivations that influence how people think, feel, and behave in response to leadership challenges.	A person's level of effectiveness in response to leadership challenges. Leadership skills allow a person to make effective decisions and increase the performance of those around them.
<b>Where they come from</b>	Early life experiences and genetic predispositions.	Observing other leaders and learning how to respond to leadership challenges.
<b>What they tell us about a leader</b>	Personality traits predict leadership areas that will come easily and areas that will require more effort. High or low scores can be preferable depending upon the situation and role.	The person learns about skill areas in which they have a good understanding and areas in which they'll need more work. Skills change greatly over time based on experience.
<b>How to approach development</b>	Personality traits explain the types of roles and challenges that will be a good fit for a person. Adapting career choices, work environment, and routines based on the person's personality helps him or her be more successful. Personality traits also point to potential difficulties an individual might face as a leader. Because personality traits are difficult to change, help the person establish good habits so he or she learns to resist impulses and avoid personality risks.	Observing what great leaders do and trying out challenging opportunities are the keys to becoming more skilled. A person develops skills by learning new ways of performing, experimenting with new approaches, getting feedback on areas for improvement, and trying repeatedly.

## > Personality Definitions

The Early Identifier inventories measure personality areas that enable or inhibit leadership success.

<b>Competitive Drive</b>	A tendency to strive for excellence and set challenging goals. Highly driven individuals are persistent and constantly demand the highest quality. They set the most challenging goals for themselves and those around them. Lower-drive individuals are less intense and not burdened by overly high expectations. However, they might give up on goals prematurely or lower their expectations when faced with adversity.
<b>Discipline</b>	How organized, planful, and disciplined a person tends to be. A person high in Discipline prefers to create structure, clarify others' roles, and develop a comprehensive plan of action. A person lower in Discipline might be highly creative or adaptable but also distractible or unpredictable.
<b>Collaborative Orientation</b>	A preference for getting others involved and coordinating teams to work through complex problems. A person high in Collaborative Orientation seeks and enjoys opportunities to work with others on tasks and projects. Those who are low in Collaborative Orientation prefer working alone and actively avoid situations in which they must coordinate the actions of a group to get work done.
<b>Assertiveness</b>	A tendency to be direct, take charge, challenge others, exude confidence, and stand up for one's beliefs. People high in Assertiveness express their opinions, try to take on leadership roles, and tend to be natural leaders. But highly assertive people also can hog the spotlight or monopolize discussions, which can hurt collaboration and teamwork if not paired with high Collaborative Orientation or Perspective Taking.
<b>Control Orientation</b>	Belief in control of one's own destiny and life outcomes. Someone with an internalized Control Orientation feels empowered and responsible for his or her successes. A person with an externalized Control Orientation feels that external forces or luck explain much of his or her life outcomes.
<b>Coaching Motivation</b>	Interest and enjoyment in monitoring, supporting, and urging people to reach higher levels of job performance. A person high in this characteristic is actively engaged in helping others develop and improve performance.
<b>Workplace Curiosity</b>	The desire to explore new, complex, and broad-reaching ideas and challenges in order to learn. People who are high in Workplace Curiosity enjoy tackling abstract problems, learning new things, and taking risks to develop new skills. People who are low in Workplace Curiosity are more likely to resist innovative ideas, stick to old problem-solving approaches, or avoid staying current with changes in their field and organization.



<b>Perspective Taking</b>	A tendency to seek and understand others' beliefs, values, motives, thoughts, and ideas while withholding judgment. People high in Perspective Taking are highly motivated to understand the perspectives of others, especially those of diverse backgrounds. Those who are low in Perspective Taking are less interested in trying to understand why others might have a different point of view and are less willing to withhold judgment when confronted with opposing views.
<b>Feedback Receptivity</b>	A tendency to seek, value, and reflect on feedback from others. People who are high in this characteristic welcome constructive feedback to improve their performance. Those who are low in Feedback Receptivity often reject, avoid, or ignore constructive feedback.
<b>Adaptive Motivation</b>	A person's desire to engage in continuously changing, ambiguous work with constantly shifting deadlines and priorities. People who are high in Adaptive Motivation crave the challenge and excitement that come from high-risk, high-velocity, and high-ambiguity projects. Those who are low in Adaptive Motivation prefer working with plans and sticking to routine, consistent, and predictable assignments.

## > Skill Definitions

The Early Identifier measures a person's skills through the actions he or she takes in the face of the challenges presented during the immersive simulation.

<b>Driving Results</b>	Setting appropriate goals, creating structure, and monitoring progress to guide teams toward success.
<b>Managing Relationships</b>	Sharing appropriate thoughts, making others feel valued, and acting in a trustworthy manner.
<b>Leading Change</b>	Encouraging others to challenge assumptions, showing sensitivity to others' resistance to change, and maintaining a sense of urgency.
<b>Developing Others</b>	Providing clear and honest feedback, encouraging others to take on challenges, considering the unique needs and context of people being developed, and setting realistic development plans.
<b>Analyzing Strategy</b>	Collecting and interpreting multiple sources of information to determine the most critical priorities for driving long-term success.
<b>Navigating Complex Decisions</b>	Facilitating the decision-making process and influencing key stakeholders in order to arrive at the best outcome.