



## Professional Assessment Wheels

### Description

Assessment “Wheels” are a simple, graphic way to assess high-level categories relevant to an organization, team, or individual. They are particularly useful in getting a “bird’s eye view” of a situation, and quickly arriving at a sense of overall levels of satisfaction, prioritization, or whatever criteria is relevant.

The format of an assessment wheel can be tailored to reflect the categories that are most relevant. For example, a Sales Manager’s assessment categories might include: Reaching Sales Quota, Team Morale, Competition, Technology, and so forth.

The Wheels can be used with individuals, or can form the basis of a team activity.

### Instructions

To use the *Professional Assessment Wheels*:

1. Use the wheel provided or create your own with the appropriate categories.
2. Ask the individual or team to assess the degree of satisfaction (proficiency, challenge, need — whatever your criteria may be) for each section of the wheel, rating it from 1 (low) to 10 (high).
3. Draw a line across the section to indicate the rating.
4. When complete, look at the wheel overall to derive whatever insight can come from it. Good questions to ask are:
  - What does the overall set of ratings indicate?
  - What areas are strong and what areas are weak?
  - What stands out about the ratings?
  - What needs the most attention?
  - What emerges as the place for the most focus now?



## Professional Assessment Wheel

Name: \_\_\_\_\_

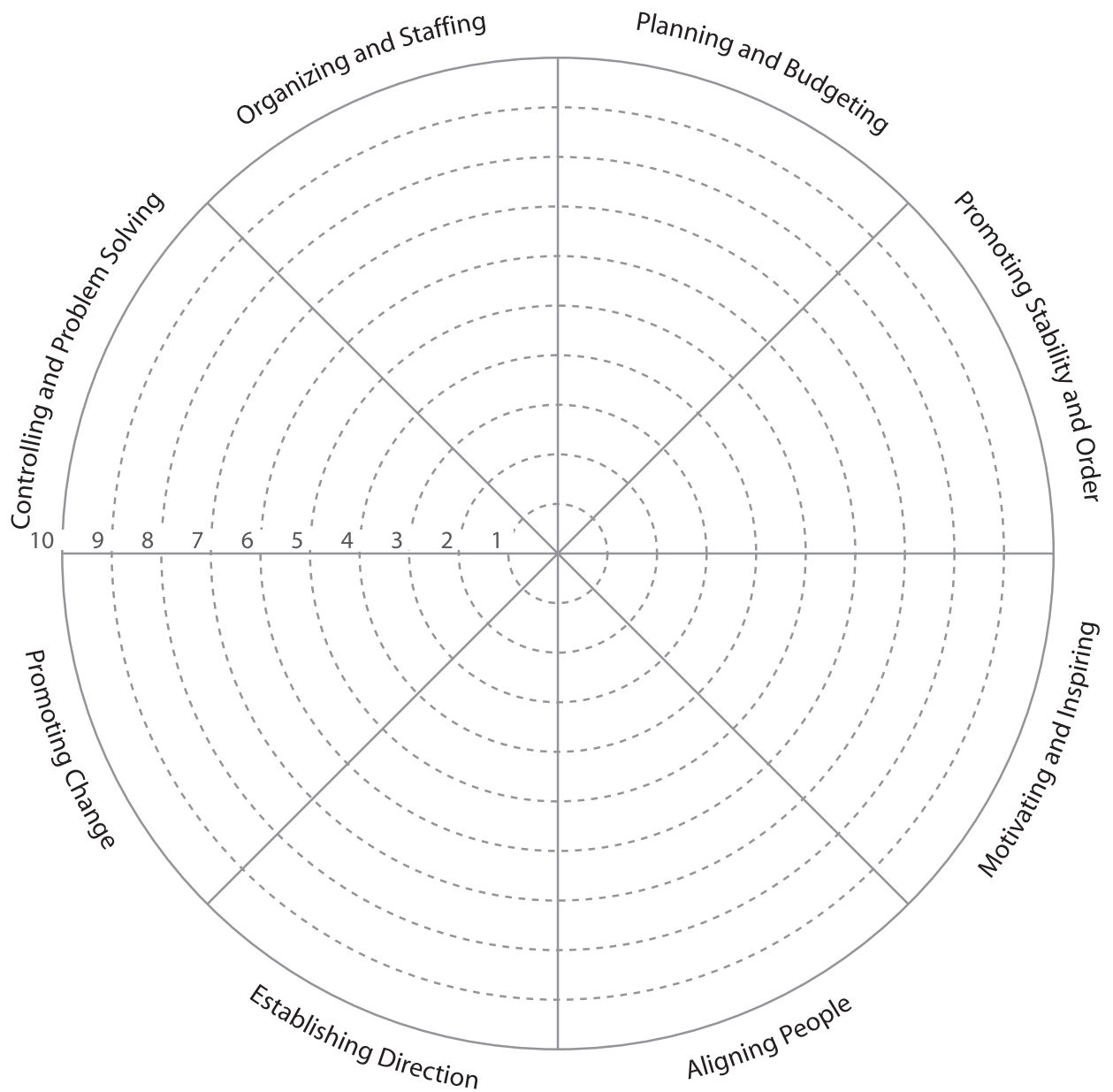
Position: \_\_\_\_\_

Organization: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-mail: \_\_\_\_\_

**INSTRUCTIONS:** On a scale of 0 to 10, score your satisfaction with your abilities in the following areas. Please see a description of each on the following page.





## Descriptions of Management/Leadership Abilities

- *Planning and Budgeting:* Establishing detailed steps and timetables for achieving results and then allocating the resources necessary to make it happen
- *Establishing Direction:* Developing a vision of the future, often the distant future, and strategies for producing the changes needed to achieve that vision
- *Organizing and Staffing:* Establishing a structure for accomplishing plan requirements, staffing that structure with people, delegating authority for carrying out the plan, providing policies and procedures to guide people, and creating methods or systems to monitor implementation
- *Aligning People:* Communicating the direction in words and deeds to all those whose cooperation may be needed so as to create a team that understands the vision and strategies and accepts their validity
- *Controlling and Problem Solving:* Monitoring results in detail, identifying deviations from the plan, and then organizing to solve these problems
- *Motivating and Inspiring:* Energizing people to overcome major political, bureaucratic, and resource barriers to change by satisfying basic, but often unfulfilled, human needs
- *Promoting Stability and Order:* Creating the potential for consistent production of key results
- *Promoting Change:* Creating the potential for production of useful change (such as desired new products)

(Adapted from, John P. Kotter, *A Force for Change, How Leadership Differs From Management*, The Free Press, 1990.)



## Customized Assessment Wheel

Name: \_\_\_\_\_

Position: \_\_\_\_\_ Organization: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

**INSTRUCTIONS:** On a scale of 0 to 10, score your satisfaction with your abilities in the following areas.

