

# Leadership Versatility Index<sup>®</sup>

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**Robert E. Kaplan**  
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**Pat Sample**

August 2009

**FORCEFUL**

**ENABLING**

**STRATEGIC**

**OPERATIONAL**

**KAPLAN DEVRIES INC.**

# Leadership Versatility Index®

Robert E. Kaplan and Robert B. Kaiser

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## Feedback for:

**Pat Sample**

August 2009

General manager (Line)

Business – publicly traded

Managerial experience:

13 years

Time in current job:

6 months

## Feedback from:

**15 Total Coworkers**

1 Boss

2 Other superiors

4 Peers

8 Direct Reports

*Note:* Results for Peers and Direct Reports are presented separately only if three or more individuals from those groups provide ratings. However, if only one or two individuals from those groups provide ratings, their data will be included in the results reported for All Coworkers.

Leadership Versatility Index, version 3.0

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The method of assessment used by the Leadership Versatility Index is protected by U.S. Patent No. 7,121,830.

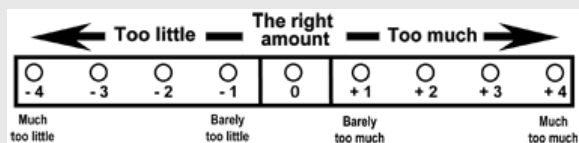
The **Leadership Versatility Index (LVI)** measures versatility on two complementary pairs of leadership dimensions:

**Forceful & Enabling**  
**Strategic & Operational**

Each pair is a combination of opposites. To be good at both sides of oppositions or dualities like these is to be versatile. Many leaders, however, are better at one side than the other. They are lopsided. Your scores on this instrument will give you a reading on the extent to which you are versatile or lopsided.

### Overdoing and Underdoing

The LVI's rating scale is shown below. As you noted in filling out the survey on yourself, this is not the typical kind of rating scale, where higher scores are "better." The most desirable score on this instrument falls right in the middle of the scale, a score of "0."



The scale was designed on the premise that suboptimal performance is often a result of either overdoing a behavior or underdoing it. Any "minus scores" (negative numbers) you receive indicate that your raters think you do too little of the behavior--that you either don't do it frequently enough or with enough intensity. "Plus scores" (positive numbers) indicate that they think you do too much of the behavior--that you either do it too often or with too much intensity. Again, scores close to "0" (zero) are ideal.

### Pairing Opposites

Although the survey had you and your coworkers rate each item individually, it was actually designed as a series of pairs, intended to be complements. For example:

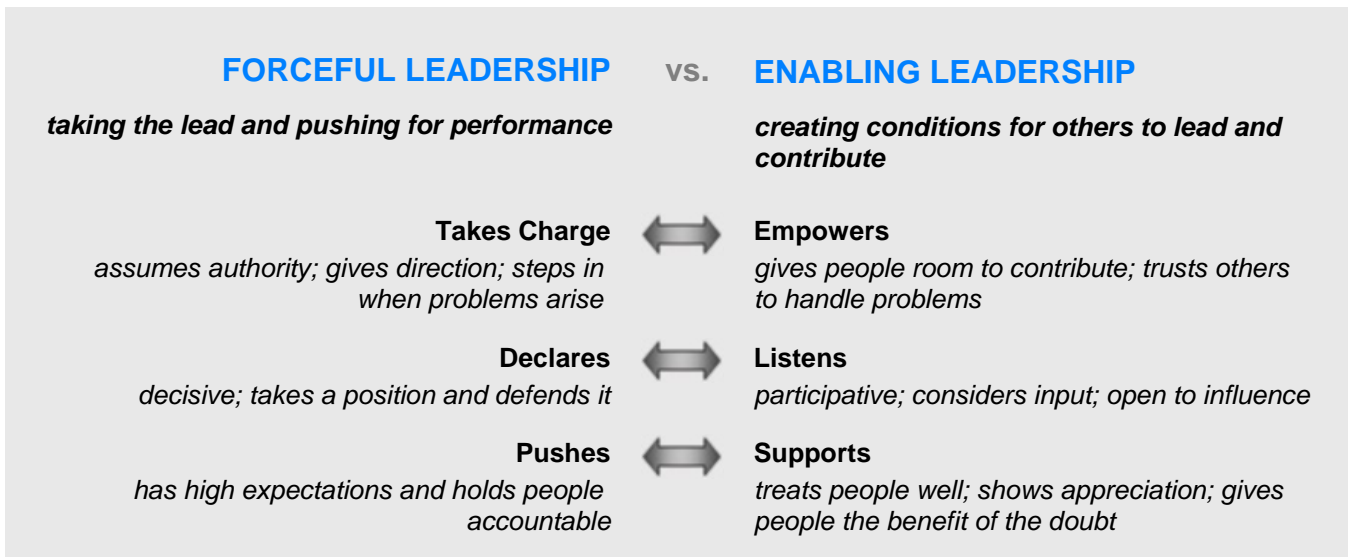
*"Steps in. Gets personally involved when problems arise."*

&

*"Trusts people to handle problems that come up in their area of responsibility."*

This feedback report presents the results in terms of pairs of opposing behaviors like the one above so that you can see how versatile or lopsided you are at a very concrete level.

The LVI is based on a leadership model that consists of two major pairs of opposing but complementary approaches. These two oppositions represent the tensions and trade-offs that make management a balancing act. One pair, Forceful and Enabling, concerns leadership style, *how* one leads. The other pair, Strategic and Operational, concerns the organizational issues a leader focuses on, *what* one leads. Each of these major pairs is comprised of three pairs of specific subdimensions, listed below.





Legend: ● = Average rating across All Coworkers (15)

**Note:** The results that appear on this graphic are based on your coworkers' ratings and do not include your self-ratings.

## Interpretation

### 1. Color Coding

- A score in the **green** zone indicates a shortcoming (green is for "go" or do more).
- A score in the **red** zone is a strength taken too far (red is for "stop" or do less).
- A score that falls in the **white band** between the green and red areas is a strength.

**2. The shape of your profile.** The closer to a circle your profile is, the more well-rounded it is, as seen by your coworkers. Bulges or flat spots indicate strengths overused and shortcomings.

**3. The versatility percentage** is an overall index of your versatility. The higher the percentage, the greater your versatility on both forceful-enabling leadership and strategic-operational leadership. The percentage can range from 0 to 100. The majority of leaders score between 70 percent and 90 percent.

## Forceful Leadership

*taking the lead and pushing for performance*

### Display Legend

Y = You

Gray Bar = All Coworkers (15)

B = Boss (1)

O = Other superiors (2)

P = Peers (4)

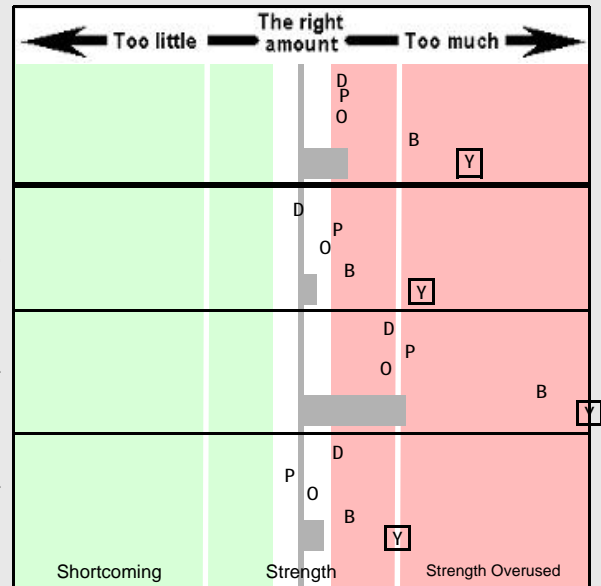
D = Direct Reports (8)

**Overall**

*Takes Charge*

*Declares*

*Pushes*



## Enabling Leadership

*creating conditions for others to lead and contribute*

### Display Legend

Y = You

Gray Bar = All Coworkers (15)

B = Boss (1)

O = Other superiors (2)

P = Peers (4)

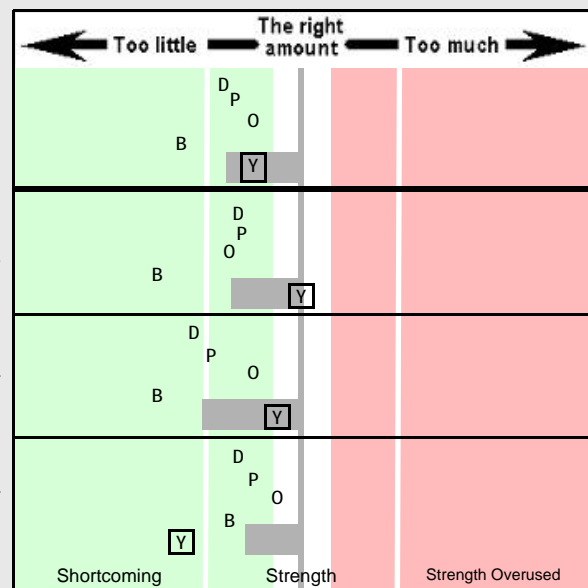
D = Direct Reports (8)

**Overall**

*Empowers*

*Listens*

*Supports*



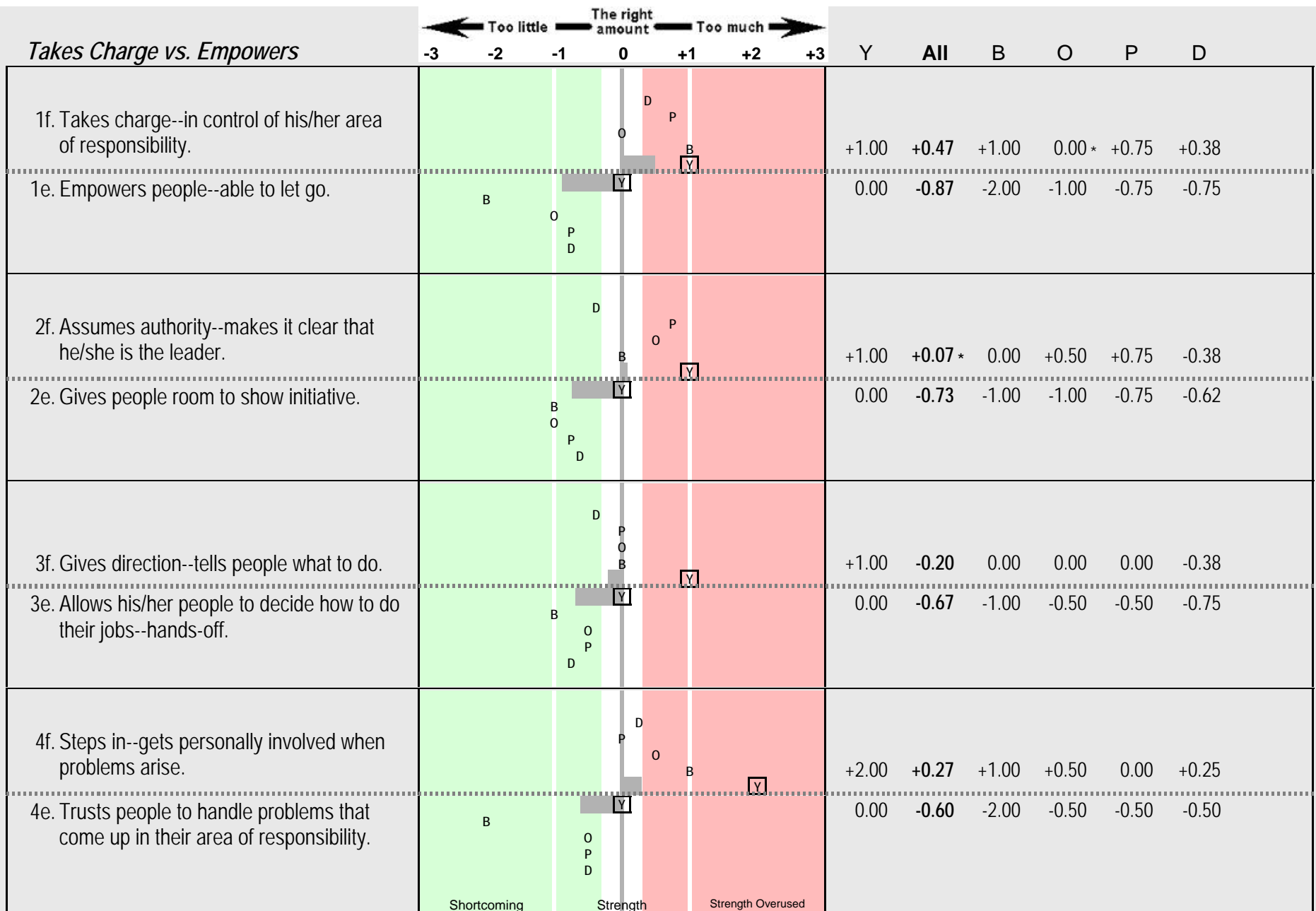
## F-E Versatility

*the ability to freely draw upon these two opposites, unrestricted by bias in favor of one side and prejudice against the other side. The higher the percentage, the greater your versatility on this important duality.*

	F-E Versatility
You	62%
All Coworkers	77%
Boss	65%
Other superiors	83%
Peers	77%
Direct Reports	77%

The average F-E Versatility score is 79% (SD=9%).

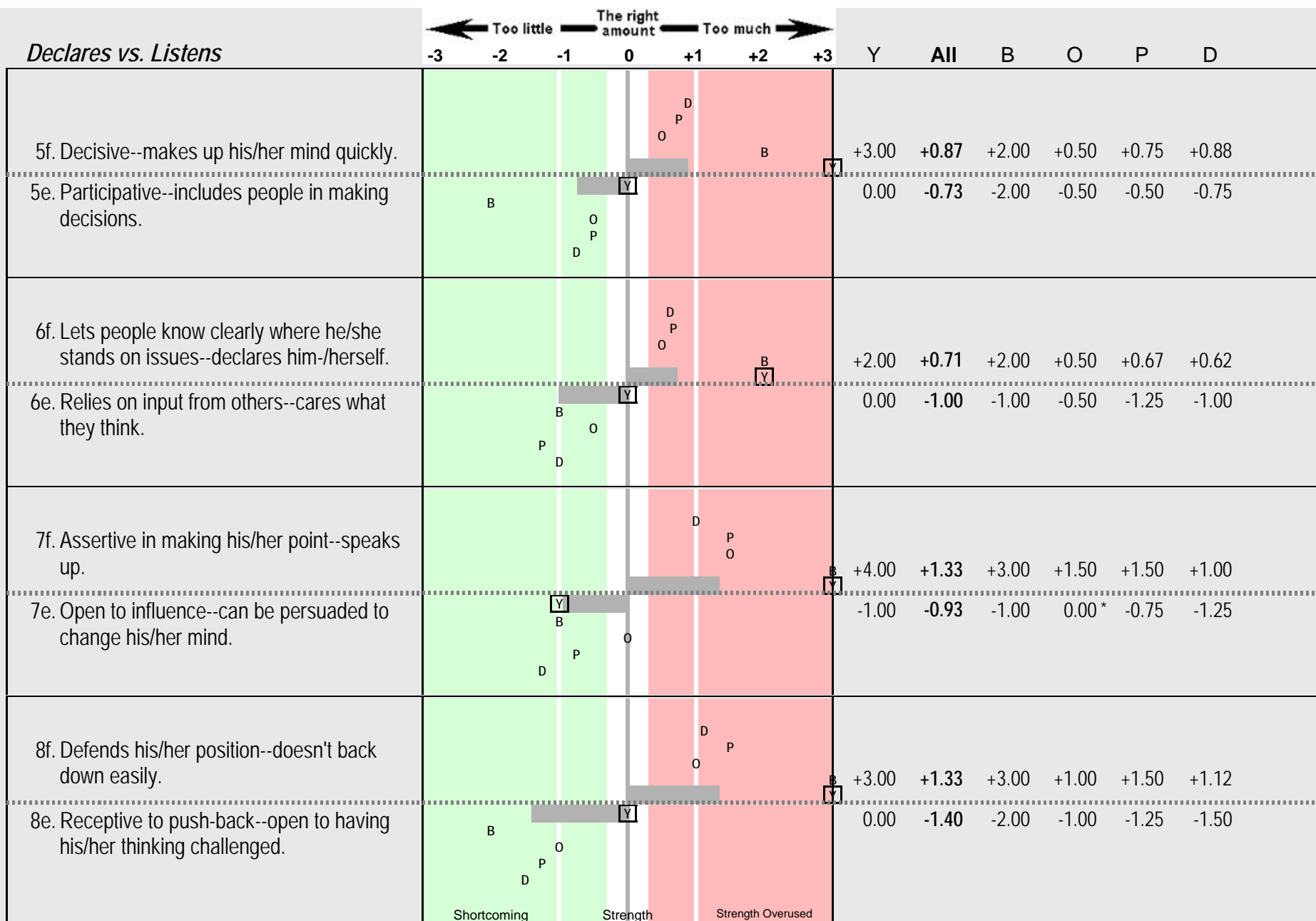
# Forceful & Enabling *item averages*



**Note:** Scores flagged with an \* are averages based on a mix of "too little" and "too much" ratings and may be misleading. See p. 9 for an explanation of these scores.

**Legend:** Y=You, Gray Bar=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

# Forceful & Enabling *item averages*

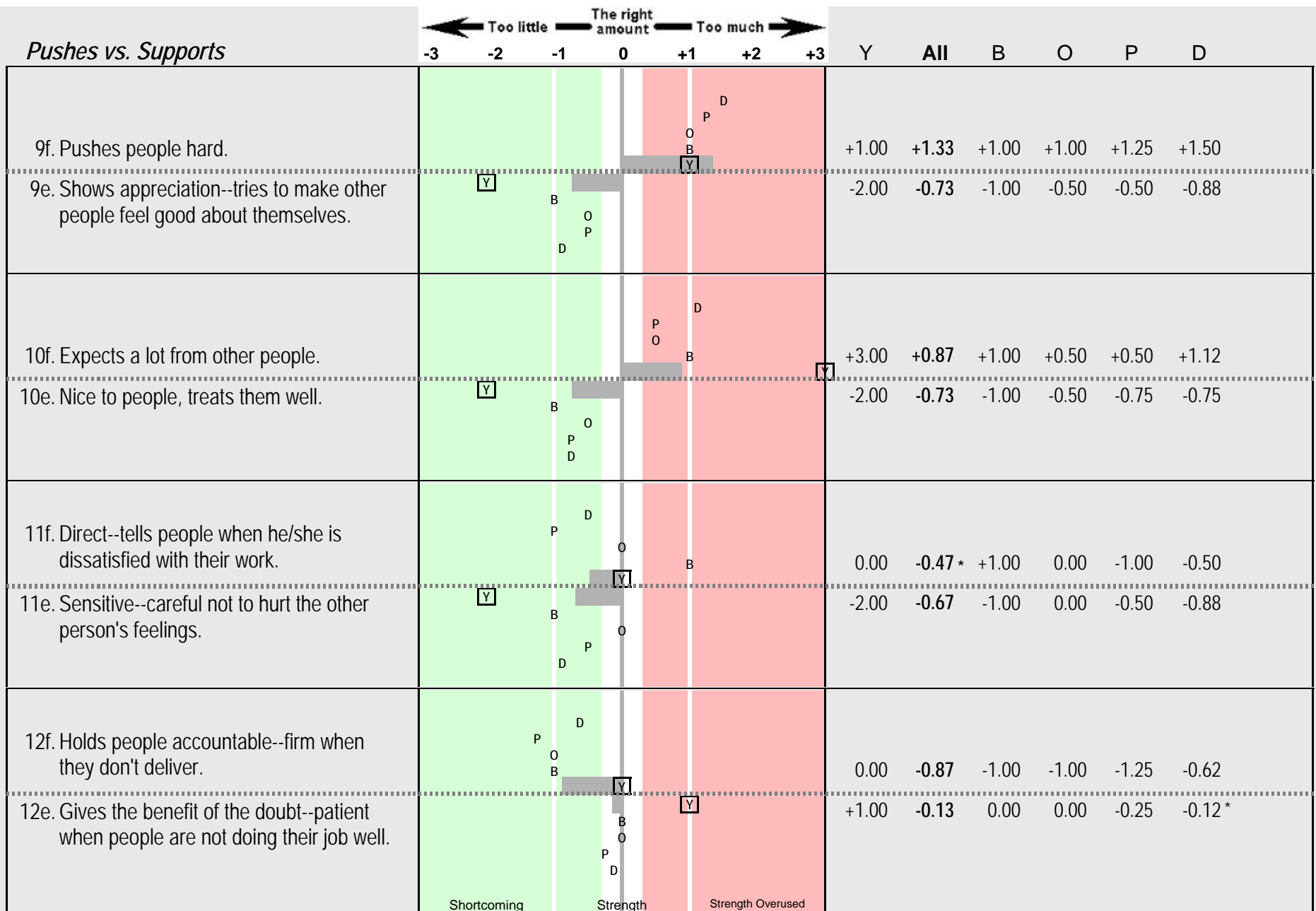


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**Legend:** Y=You, Gray Bar=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)



# Forceful & Enabling *item averages*



**Note:** Scores flagged with an \* are averages based on a mix of "too little" and "too much" ratings and may be misleading. See p. 9 for an explanation of these scores.

**Legend:** Y=You, Gray Bar=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

# Forceful & Enabling *distribution of ratings*

FORCEFUL	Too Little				Right Amount		Too Much				
	B	O	P	D	All		B	O	P	D	
<b><i>Takes Charge</i></b>											
1f. In control	0	1	0	0	1	6	8	1	1	3	3
2f. Assumes authority	0	0	0	3	3	8	4	0	1	3	0
3f. Gives direction	0	0	0	3	3	12	0	0	0	0	0
4f. Steps in	0	0	0	1	1	9	5	1	1	0	3
<b><i>Declares</i></b>											
5f. Decisive	0	0	0	0	0	6	9	1	1	3	4
6f. Takes stands	0	0	0	0	0	6	8	1	1	2	4
7f. Speaks up	0	0	0	0	0	4	11	1	2	4	4
8f. Doesn't back down easily	0	0	0	0	0	2	13	1	2	4	6
<b><i>Pushes</i></b>											
9f. Pushes people hard	0	0	0	0	0	3	12	1	2	3	6
10f. Expects a lot	0	0	0	0	0	5	10	1	1	2	6
11f. Direct when dissatisfied	0	0	3	3	6	7	2	1	0	1	0
12f. Holds people accountable	1	2	3	5	11	4	0	0	0	0	0
<b>Total</b>	1	3	6	15	25	72	82	9	12	25	36
<b>Proportion</b>	.08	.13	.13	.16	.14	.40	.46	.75	.50	.53	.38

ENABLING	Too Little				Right Amount		Too Much				
	B	O	P	D	All		B	O	P	D	
<b><i>Empowers</i></b>											
1e. Empowers people	1	2	3	5	11	4	0	0	0	0	0
2e. Gives people room	1	2	3	4	10	5	0	0	0	0	0
3e. Hands-off	1	1	2	4	8	7	0	0	0	0	0
4e. Trusts people	1	1	2	2	6	9	0	0	0	0	0
<b><i>Listens</i></b>											
5e. Participative	1	1	2	5	9	6	0	0	0	0	0
6e. Relies on input	1	1	4	6	12	3	0	0	0	0	0
7e. Open to influence	1	1	3	6	11	3	1	0	1	0	0
8e. Receptive to push-back	1	2	3	5	11	4	0	0	0	0	0
<b><i>Supports</i></b>											
9e. Shows appreciation	1	1	2	5	9	6	0	0	0	0	0
10e. Treats people well	1	1	3	6	11	4	0	0	0	0	0
11e. Sensitive to people's feelings	1	0	2	6	9	5	1	0	0	0	1
12e. Gives the benefit of the doubt	0	0	1	2	3	10	2	0	0	0	2
<b>Total</b>	11	13	30	56	110	66	4	0	1	0	3
<b>Proportion</b>	.92	.54	.63	.58	.61	.37	.02	.00	.04	.00	.03

Legend: All=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

## Strategic Leadership

*positioning the organization for the future*

### Display Legend

Y = You

Gray Bar = All Coworkers (15)

B = Boss (1)

O = Other superiors (2)

P = Peers (4)

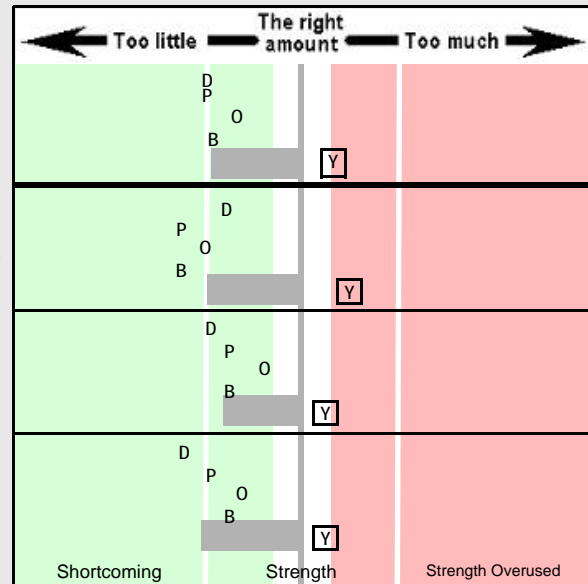
D = Direct Reports (8)

**Overall**

*Direction*

*Growth*

*Innovation*



## Operational Leadership

*focusing the organization on the short term*

### Display Legend

Y = You

Gray Bar = All Coworkers (15)

B = Boss (1)

O = Other superiors (2)

P = Peers (4)

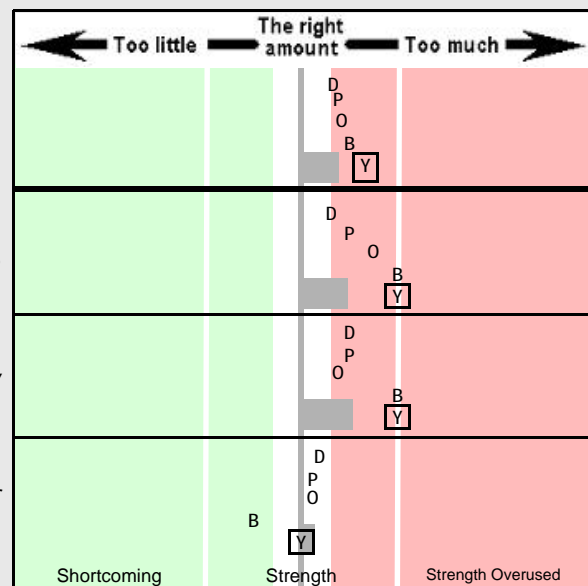
D = Direct Reports (8)

**Overall**

*Execution*

*Efficiency*

*Order*



## S-O Versatility

*the ability to freely draw upon these two opposites, unrestricted by bias in favor of one side and prejudice against the other side. The higher the percentage, the greater your versatility on this important duality.*

	S-O Versatility
You	69%
All Coworkers	76%
Boss	71%
Other superiors	82%
Peers	77%
Direct Reports	75%

The average S-O Versatility score is 81% (SD=8%).

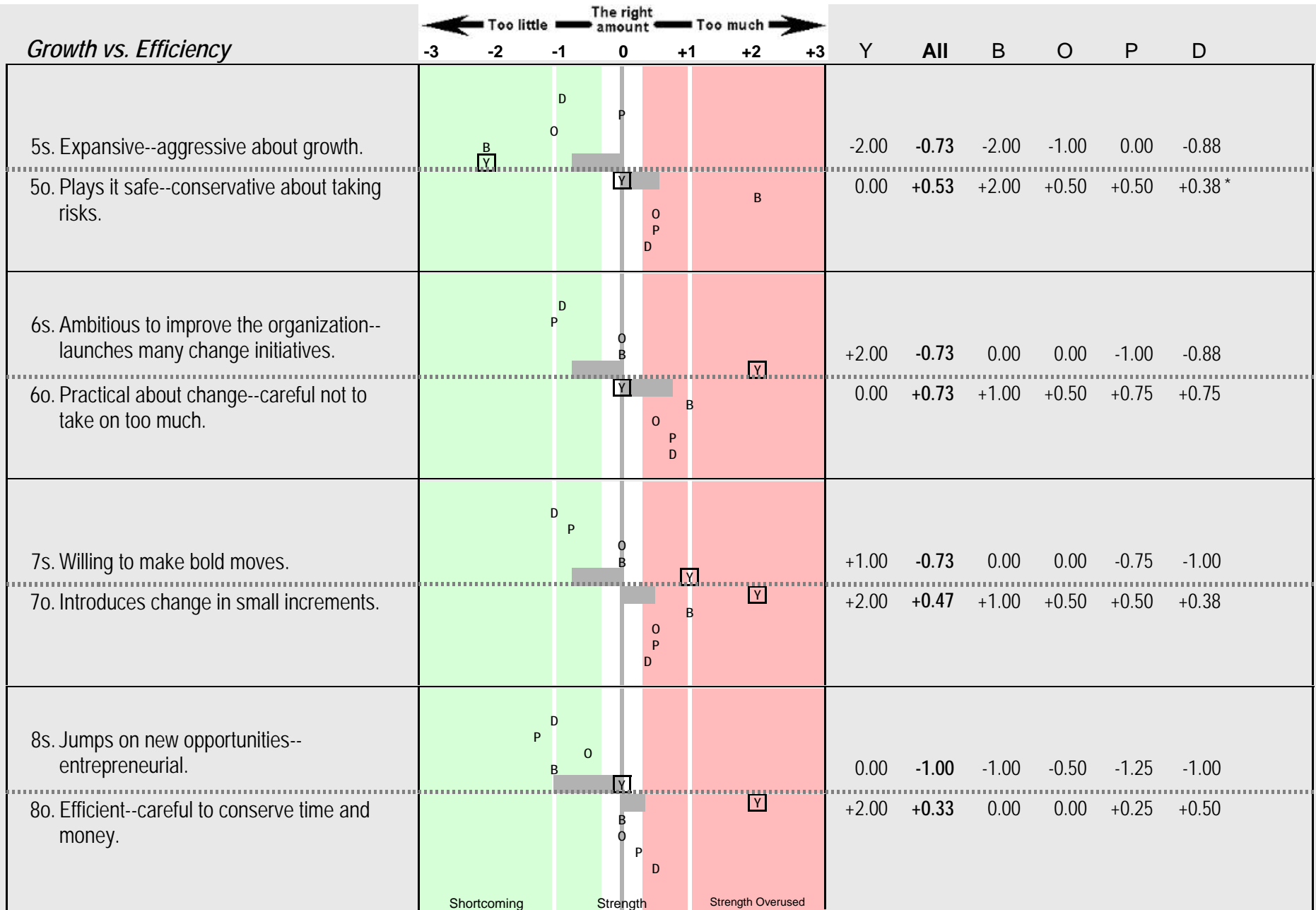
# Strategic & Operational *item averages*

<i>Direction vs. Execution</i>	← Too little — The right amount — Too much →							Y	All	B	O	P	D
	-3	-2	-1	0	+1	+2	+3						
1s. Spends time and energy on long-term planning--future-oriented.								-2.00	-1.13	-2.00	-1.00	-1.75	-0.75
1o. Focused on getting things done in the short term.								+2.00	+0.73	+1.00	+0.50	+0.75	+0.75
2s. Thinks strategically.								+2.00	-0.80	-1.00	-1.00	-1.50	-0.38
2o. Tactical--gets involved in solving day-to-day problems.								+3.00	+0.73	+1.00	+0.50	+1.00	+0.62
3s. Takes a big-picture perspective--thinks broadly.								+2.00	-1.00	-1.00	-1.00	-0.50	-1.25
3o. Pays attention to detail--has a finger on the pulse of day-to-day activities.								-1.00	+0.73	+2.00	+2.00	+0.50	+0.38 *
4s. Anticipates the need to change direction--looks ahead.								0.00	-0.93	-1.00	-1.00	-1.25	-0.75
4o. Monitors progress--follows up.								0.00	-0.33	0.00	0.00	-0.25	-0.50
	Shortcoming			Strength		Strength Overused							

**Note:** Scores flagged with an \* are averages based on a mix of "too little" and "too much" ratings and may be misleading. See p. 14 for an explanation of these scores.

**Legend:** Y=You, Gray Bar=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

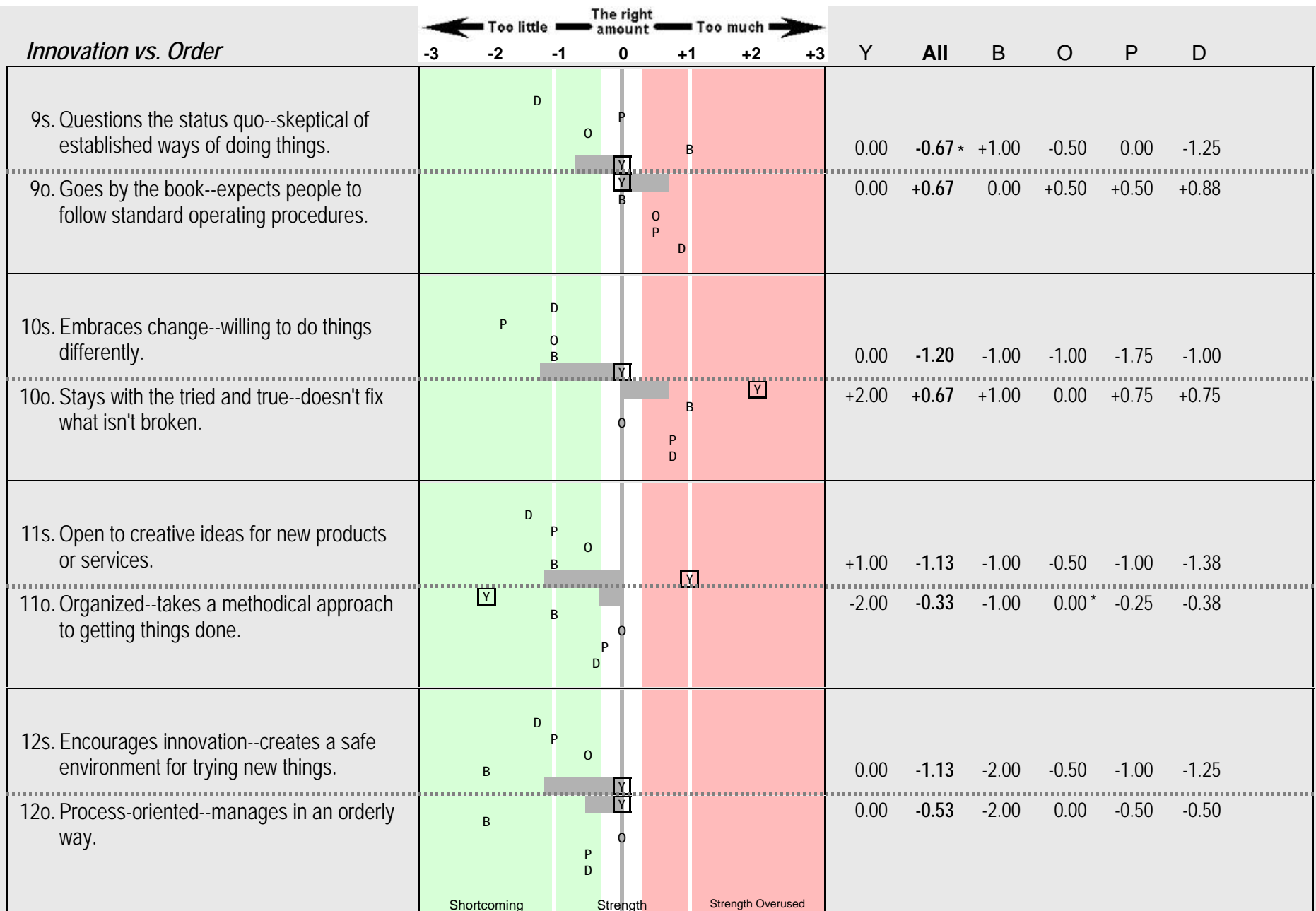
# Strategic & Operational *item averages*



**Note:** Scores flagged with an \* are averages based on a mix of "too little" and "too much" ratings and may be misleading. See p. 14 for an explanation of these scores.

**Legend:** Y=You, Gray Bar=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

# Strategic & Operational *item averages*



**Note:** Scores flagged with an \* are averages based on a mix of "too little" and "too much" ratings and may be misleading. See p. 14 for an explanation of these scores.

**Legend:** Y=You, Gray Bar=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

STRATEGIC	Too Little				Right Amount		Too Much				
	B	O	P	D	All		B	O	P	D	
<b>Direction</b>											
1s. Future-oriented	1	1	4	4	10	5	0	0	0	0	0
2s. Thinks strategically	1	2	2	4	9	5	1	0	0	0	1
3s. Big-picture perspective	1	2	2	5	10	5	0	0	0	0	0
4s. Anticipates change	1	2	2	4	9	6	0	0	0	0	0
<b>Growth</b>											
5s. Aggressive about growth	1	2	0	4	7	8	0	0	0	0	0
6s. Launches many changes	0	0	2	3	5	10	0	0	0	0	0
7s. Bold moves	0	0	2	5	7	7	1	0	0	0	1
8s. Entrepreneurial	1	1	4	5	11	3	1	0	0	0	1
<b>Innovation</b>											
9s. Questions the status quo	0	1	0	4	5	9	1	1	0	0	0
10s. Embraces change	1	2	4	4	11	3	1	0	0	0	1
11s. Open to new ideas	1	1	3	5	10	5	0	0	0	0	0
12s. Encourages innovation	1	1	4	5	11	3	1	0	0	0	1
<b>Total</b>	9	15	29	52	105	69	6	1	0	0	5
<b>Proportion</b>	.75	.63	.60	.54	.58	.38	.03	.08	.00	.00	.05

OPERATIONAL	Too Little				Right Amount		Too Much				
	B	O	P	D	All		B	O	P	D	
<b>Execution</b>											
1o. Short-term focus	0	0	0	0	0	7	8	1	1	2	4
2o. Tactical	0	0	0	0	0	6	9	1	1	3	4
3o. Attention to detail	0	0	0	3	3	3	9	1	2	2	4
4o. Follows up	0	0	1	4	5	10	0	0	0	0	0
<b>Efficiency</b>											
5o. Conservative about risk	0	0	0	2	2	6	7	1	1	2	3
6o. Practical about change	0	0	0	0	0	5	10	1	1	3	5
7o. Incremental change	0	0	0	1	1	7	7	1	1	2	3
8o. Efficient	0	0	0	1	1	10	4	0	0	1	3
<b>Order</b>											
9o. Goes by the book	0	0	0	0	0	9	6	0	1	2	3
10o. Stays with tried and true	0	0	0	1	1	7	7	1	0	2	4
11o. Organized	1	1	1	3	6	8	1	0	1	0	0
12o. Process-oriented	1	0	2	3	6	9	0	0	0	0	0
<b>Total</b>	2	1	4	18	25	87	68	7	9	19	33
<b>Proportion</b>	.17	.04	.08	.19	.14	.48	.38	.58	.38	.40	.34

Legend: All=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

# Rank Order of Items

Pat Sample  
August 2009

Item	Sub-dimension	You	All	B	O	P	D
7f. Speaks up	<i>Declares</i>	+4.00	+1.33	+3.00	+1.50	+1.50	+1.00
8f. Doesn't back down easily	<i>Declares</i>	+3.00	+1.33	+3.00	+1.00	+1.50	+1.12
9f. Pushes people hard	<i>Pushes</i>	+1.00	+1.33	+1.00	+1.00	+1.25	+1.50
10f. Expects a lot	<i>Pushes</i>	+3.00	+0.87	+1.00	+0.50	+0.50	+1.12
5f. Decisive	<i>Declares</i>	+3.00	+0.87	+2.00	+0.50	+0.75	+0.88
1o. Short-term focus	<i>Execution</i>	+2.00	+0.73	+1.00	+0.50	+0.75	+0.75
2o. Tactical	<i>Execution</i>	+3.00	+0.73	+1.00	+0.50	+1.00	+0.62
3o. Attention to detail	<i>Execution</i>	-1.00	+0.73	+2.00	+2.00	+0.50	+0.38 *
6o. Practical about change	<i>Efficiency</i>	0.00	+0.73	+1.00	+0.50	+0.75	+0.75
6f. Takes stands	<i>Declares</i>	+2.00	+0.71	+2.00	+0.50	+0.67	+0.62
10o. Stays with tried and true	<i>Order</i>	+2.00	+0.67	+1.00	0.00	+0.75	+0.75
9o. Goes by the book	<i>Order</i>	0.00	+0.67	0.00	+0.50	+0.50	+0.88
5o. Conservative about risk	<i>Efficiency</i>	0.00	+0.53	+2.00	+0.50	+0.50	+0.38 *
1f. In control	<i>Takes Charge</i>	+1.00	+0.47	+1.00	0.00 *	+0.75	+0.38
7o. Incremental change	<i>Efficiency</i>	+2.00	+0.47	+1.00	+0.50	+0.50	+0.38
8o. Efficient	<i>Efficiency</i>	+2.00	+0.33	0.00	0.00	+0.25	+0.50
4f. Steps in	<i>Takes Charge</i>	+2.00	+0.27	+1.00	+0.50	0.00	+0.25
2f. Assumes authority	<i>Takes Charge</i>	+1.00	+0.07 *	0.00	+0.50	+0.75	-0.38
12e. Gives the benefit of the doubt	<i>Supports</i>	+1.00	-0.13	0.00	0.00	-0.25	-0.12 *
3f. Gives direction	<i>Takes Charge</i>	+1.00	-0.20	0.00	0.00	0.00	-0.38
11o. Organized	<i>Order</i>	-2.00	-0.33	-1.00	0.00 *	-0.25	-0.38
4o. Follows up	<i>Execution</i>	0.00	-0.33	0.00	0.00	-0.25	-0.50
11f. Direct when dissatisfied	<i>Pushes</i>	0.00	-0.47 *	+1.00	0.00	-1.00	-0.50
12o. Process-oriented	<i>Order</i>	0.00	-0.53	-2.00	0.00	-0.50	-0.50
4e. Trusts people	<i>Empowers</i>	0.00	-0.60	-2.00	-0.50	-0.50	-0.50
11e. Sensitive to people's feelings	<i>Supports</i>	-2.00	-0.67	-1.00	0.00	-0.50	-0.88
3e. Hands-off	<i>Empowers</i>	0.00	-0.67	-1.00	-0.50	-0.50	-0.75
9s. Questions the status quo	<i>Innovation</i>	0.00	-0.67 *	+1.00	-0.50	0.00	-1.25
10e. Treats people well	<i>Supports</i>	-2.00	-0.73	-1.00	-0.50	-0.75	-0.75
2e. Gives people room	<i>Empowers</i>	0.00	-0.73	-1.00	-1.00	-0.75	-0.62
5e. Participative	<i>Listens</i>	0.00	-0.73	-2.00	-0.50	-0.50	-0.75
5s. Aggressive about growth	<i>Growth</i>	-2.00	-0.73	-2.00	-1.00	0.00	-0.88
6s. Launches many changes	<i>Growth</i>	+2.00	-0.73	0.00	0.00	-1.00	-0.88
7s. Bold moves	<i>Growth</i>	+1.00	-0.73	0.00	0.00	-0.75	-1.00
9e. Shows appreciation	<i>Supports</i>	-2.00	-0.73	-1.00	-0.50	-0.50	-0.88
2s. Thinks strategically	<i>Direction</i>	+2.00	-0.80	-1.00	-1.00	-1.50	-0.38
12f. Holds people accountable	<i>Pushes</i>	0.00	-0.87	-1.00	-1.00	-1.25	-0.62
1e. Empowers people	<i>Empowers</i>	0.00	-0.87	-2.00	-1.00	-0.75	-0.75
4s. Anticipates change	<i>Direction</i>	0.00	-0.93	-1.00	-1.00	-1.25	-0.75
7e. Open to influence	<i>Listens</i>	-1.00	-0.93	-1.00	0.00 *	-0.75	-1.25
3s. Big-picture perspective	<i>Direction</i>	+2.00	-1.00	-1.00	-1.00	-0.50	-1.25
6e. Relies on input	<i>Listens</i>	0.00	-1.00	-1.00	-0.50	-1.25	-1.00
8s. Entrepreneurial	<i>Growth</i>	0.00	-1.00	-1.00	-0.50	-1.25	-1.00
11s. Open to new ideas	<i>Innovation</i>	+1.00	-1.13	-1.00	-0.50	-1.00	-1.38
12s. Encourages innovation	<i>Innovation</i>	0.00	-1.13	-2.00	-0.50	-1.00	-1.25
1s. Future-oriented	<i>Direction</i>	-2.00	-1.13	-2.00	-1.00	-1.75	-0.75
10s. Embraces change	<i>Innovation</i>	0.00	-1.20	-1.00	-1.00	-1.75	-1.00
8e. Receptive to push-back	<i>Listens</i>	0.00	-1.40	-2.00	-1.00	-1.25	-1.50

**Note:** Scores that are flagged with an \* are difficult to interpret; they are based on a mix of "too much" and "too little" ratings.

**Legend:** All=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

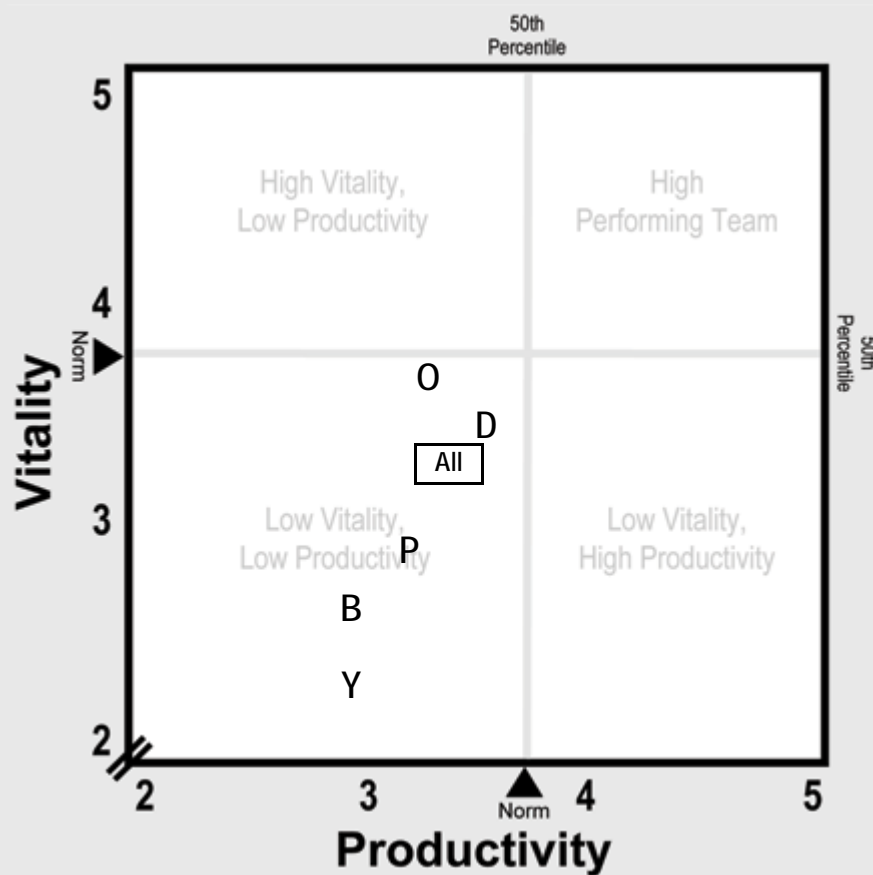


Effective leaders build teams that get stellar results and can keep it up over time. Their teams are characterized by two things:

**Productivity** refers to the volume and quality of the team's output.

**Vitality** concerns how team members feel about the work and about each other.

You and your coworkers rated your team on a 3-item measure of productivity and a separate 3-item measure of vitality. Below are the overall results. The results for the specific items appear on the next page.



**Legend:** Y=You, All=All Coworkers (15), B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

Scale Item	Y	All Coworkers (15)	B (1)	O (2)	P (4)	D (8)
<b>Productivity</b>	<b>3.00</b>	<b>3.42</b>	<b>3.00</b>	<b>3.33</b>	<b>3.25</b>	<b>3.58</b>
Quantity of output	3.00	3.53	3.00	3.50	3.50	3.63
Quality of output	3.00	3.07	3.00	3.00	2.75	3.25
Overall productivity	3.00	3.67	3.00	3.50	3.50	3.88
<b>Vitality</b>	<b>2.33</b>	<b>3.29</b>	<b>2.67</b>	<b>3.67</b>	<b>2.92</b>	<b>3.46</b>
Morale	2.00	3.47	3.00	3.50	3.75	3.38
Engagement with the work	3.00	3.13	2.00	3.50	2.50	3.50
Cohesiveness	2.00	3.27	3.00	4.00	2.50	3.50

*Note:* Raters rated each item on a 1-to-5 scale where higher scores indicate more of the attribute in question.

*Legend:* Y=You, B=Boss (1), O=Other superiors (2), P=Peers (4), D=Direct Reports (8)

## 1. What are this person's major strengths as a leader—what do you most appreciate or respect about him/her?

*Note:* Each bullet represents a different respondent. Comments are presented *exactly* as submitted.

### You

- I am honest and ethical with high principles. I take my responsibility as a leader very seriously. I give everything to my job. And I have deep technical expertise in my functional area with a lot of experience.

### Boss

- Pat is a take-charge manager who really understands the operational side of the business. Intent on getting results. She is very clear where she stands on issues and speaks her mind. And she is a reliable, go-to manager; you can count on her to get the job done.

### Other superiors

- She has grown up in this company and knows her business very well. She isn't afraid to step up and take responsibility for fixing problems either.
- Pat is known as a hard-charger who will go the extra mile to get results. She has what they call managerial courage. She also has deep experience in manufacturing.

### Peers

- When a decision is made, she takes detailed care in its implementation. Very good drive for results. Makes sure her voice is heard.
- Understands how the business works, at an intimate, detailed level. She is a natural leader and presses hard for results. Has a big presence.
- Willing to understand any trouble (big or small) or activity and be involved to learn more from it. Pat is really good at understanding problems at a detailed level. She is quick to establish a clear view of alternatives.
- She knows what she wants and does everything to achieve her goals. She is also a great sparring partner to help someone better understand complex situations. She is not afraid of making decisions. She shows courage in her management.

### Direct Reports

- A sense of urgency and drive for results. Pat will do whatever it takes to deliver.
- Pat is pragmatic, fast, and focused on results. She pushes people to perform at a higher level.
- Great with numbers, really quick on her feet, a masterful problem solver. Very analytical.
- Pat is a hands-on leader who really knows the business. She also has deep technical smarts due to her experience.
- Pat is very knowledgeable in her area of expertise; she has a very deep understanding of operations and the supply chain.

## Direct Reports

- Pat is very clear about what she believes should be done. She always takes a position and is quick to let you know where she stands.
- One of the best improvisers and problem-solvers I have ever met! She also has a very strong work ethic and stands up for what she believes in.
- Pat is a natural leader, who knows exactly where she wants her team to go and never gives up until she reaches her targets. She has tremendous drive and focus on results, and she really knows her stuff.

## 2. Does this leader overuse any of his or her strengths? Briefly explain how, by taking them to an extreme, the "strengths become weaknesses."

*Note:* Each bullet represents a different respondent. Comments are presented *exactly* as submitted.

### You

- I can put too much pressure on the team in order to deliver results. Very demanding, which can bring some loss of confidence from coworkers. Speed can become impatience and too much pressure. I have also learned that I can come on strong, and shut other people down. Can be defensive at times.

### Boss

- Pat leads with her opinion and comes on too strong. She will raise an issue, then proceed to say what she thinks should be done. I admire her initiative, but sometimes she's too quick to speak up. Once she locks onto a position, it is hard to get her to see other perspectives. She intimidates some people with her assertiveness, instead of influencing them in more subtle ways. She can also be very critical or peoples' ideas.

### Other superiors

- Pat is a bit impatient—impatient to meet her objectives or the objectives of her unit. She is clearly results-oriented. This orientation could put high pressure on the members of her team. It could be a risk of over-management.
- She is very knowledgeable, but can be sometimes seem a bit opinionated. She relies too much on her operational knowledge.

### Peers

- Because she is a quick and intelligent person, some people on her team might not follow her mind as fast as expected. They feel frustrated due to the fact that they don't understand what Pat says and don't dare to ask for explanations. Pat should be more careful in this situation and ensure that everybody understands her point.
- Sometimes too detail-oriented. Thinks she can manage with an Excel file and a few action plans. More communication and dialogue is needed, not just more numbers.
- Pat wants to achieve her goals and has difficulties accepting others' points of view. She can be very dogmatic if she thinks she is right.
- Sometimes Pat can be a little bit too aggressive during discussion.

### Direct Reports

- She is a great problem-solver and knows the technical side of the business inside and out; however, she tends to get too involved in solving technical problems, to the point of micromanaging some times. She typically does this in the operational area. I have never seen her micromanage in other areas.
- Can be very arrogant, especially toward weak people. She thinks from an operational perspective, can be limited in her ability to see things from a sales and marketing perspective.
- As results-oriented, she can be a bit narrow-minded and short-sighted. For instance, she sometimes says no to good ideas and new approaches because there will be a learning curve.

## Direct Reports

- She is very smart, but can also jump too conclusions, without considering all the relevant facts. This could be perceived as a strength turned into a weakness.
- Pat is really strong in operations, but she also has a tendency to swoop in and take over on tactical matters that are frankly beneath her.
- Too impatient—changes are not so easily accomplished in the reality of that on the spread sheet. Could burn people out.
- Very principled but sometimes inflexible. Pat also has high standards, but often expects too much from people.
- Pat can sometimes be aggressive toward her team in her willingness to get the best out of them.

### 3. Does this leader have any shortcomings—areas where he or she needs to be stronger or do more?

*Note:* Each bullet represents a different respondent. Comments are presented *exactly* as submitted.

#### You

- I need to spend more time planning ahead. I have lots of ideas for where to take this unit, but need to spend less time reacting and more time on strategic planning. It is difficult because so much of our results depend on execution. And there is a lot of pressure to deliver in the near term. I could also delegate more. I could also be more open to other points of view.

#### Boss

- Pat needs to show more interest in other people's ideas, among her peers and especially on her team. I sometimes think she leaves money on the table by teeing up an issue and offering her solutions and ideas out of the gate. If she could slow down, introduce a problem, and solicit input, she would have greater buy-in and probably better quality solutions. This is especially so in areas outside her realm of expertise and experience.

#### Other superiors

- Pat could get more out of her people. She should draw them out more, invite their ideas and participation more. Her organization is centered around her and this limits how much her people can contribute.
- Pat should be more strategic in her approach.

#### Peers

- I'm not sure that Pat is a strategic thinker. Most of her concerns are minute-by-minute. I sometimes think she sacrifices the long term for short-term results.
- Pat sometimes doesn't know what she doesn't know. Sometimes she could be more humble and seek more information rather than appear like she has all the answers.
- Pat could sharpen her people skills. She could especially be a better, more active listener.
- Collaboration. She is too focused on her team and shows little interest in lateral teams.

#### Direct Reports

- Pat could be more realistic about what can and can't be done. Her expectations are too high and this has her issuing too many priorities. A more realistic appraisal of what is feasible would give us greater focus.
- I don't Pat fully understands the business, especially the sales and marketing functions. She has little experience in these areas and tends to avoid them, to the point of being out of touch.
- Pat sometimes seems risk averse and unwilling to change. She is not receptive to fresh ideas. Pat is kind of a loner in that she doesn't seek input. She could also show more appreciation.
- Pat could be more patient. Her urgency is appreciated, but sometimes she charges on without all the information. She is also too busy doing to think about what we are doing.

## Direct Reports

- It sometimes feels as if she doesn't appreciate the way a business functions. It is obvious that she favors Ops and is not interested in the marketing side.
- Sometimes I wonder if Pat trusts us. She doesn't delegate as much as she should. She is also not always willing to try other peoples ideas.
- Pat isn't a very good listener. Sometimes when you raise an issue, you can tell her mind is somewhere else.
- She is not very inclusive. She doesn't involve people in the major decisions that affect them.



4. Please provide a rating of this person's overall effectiveness as a leader on a ten-point scale where 5 is adequate and 10 is outstanding.

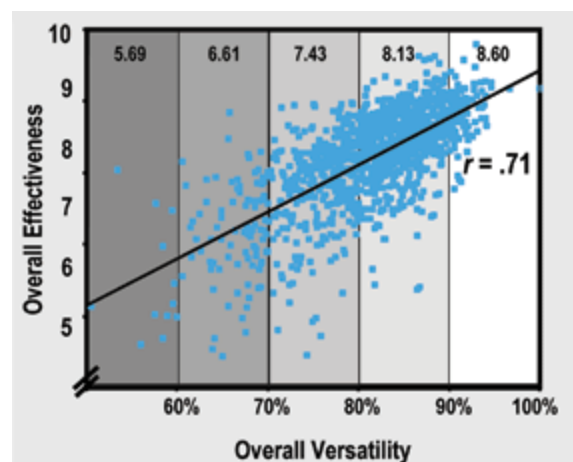
	Average	Lowest	Highest
You	<b>6.50</b>		
<b>All Coworkers (15)</b>	<b>7.57</b>	6.00	8.50
Boss (1)	<b>7.00</b>	7.00	7.00
Other superiors (2)	<b>7.75</b>	7.50	8.00
Peers (4)	<b>7.63</b>	7.00	8.00
Direct Reports (8)	<b>7.56</b>	6.00	8.50

*Note:* The average effectiveness rating in our database (more than 1,400 senior managers) is 7.73 (standard deviation = 1.06). Self-ratings and peer ratings tend to be a little lower than the average while direct report ratings tend to be a little higher--and these differences are statistically significant.

## Versatility: A Key to Leadership Effectiveness

Our research has found a strong relationship between overall effectiveness and versatility as measured by the LVI--a correlation of .71. This relationship is presented in the graph to the right.

The high correlation, based on more than 1,400 senior managers, strongly suggests that managers can become more effective by becoming more versatile--by reining in strengths overused and shoring up shortcomings.



## 4. Please explain what is effective about his/her leadership and what it would take to get a higher rating.

*Note:* Each bullet represents a different respondent. Comments are presented *exactly* as submitted.

### You

- 6.50. Because of speed, reactivity, strong focus, and good results. Increasing trust and delegation would enable me to do more and bring more effectiveness. I could be more open-minded, and perhaps less defensive and outspoken.

### Boss

- 7.00. Pat is a driver and pushes for results, which are usually good. She could do better at forming peer relationships. She needs to learn how to be better at give and take, and not always have to win the debate. Pat needs to be less reactive, and more strategic about how she spends her time. She also needs to learn how to work through a team.

### Other superiors

- 8.00. With her business knowledge and her people skills, she is easily accepted by the team and can focus on real issues rather than on conflicts. To get a higher rating, she needs to think more strategically and less tactically. I'd like to see her analyze whether an initiative should be done, rather than how it could be done.
- 7.50. Good initiative, drive for results, and experience. Be more collaborative and strategic.

### Peers

- 8.00. I think Pat is already a far better-than-average manager. She still needs to create some distance from her team's work in order to better empower her staff. It would help a lot with her peers to be more open and less defensive.
- 8.00. Pat is overall a good manager. To improve, she will have to get a wider picture and learn to manage high-level people.
- 7.50. A challenging leader that will help us to progress in many fields. Could reach the same results by more consensual ways. Be more supportive when people are in trouble. Let them have time to work on the issues: additional reporting doesn't help to solve the problems.
- 7.00. Be more constructive and cooperative with the rest of our team. Be more trusting of her own team, clarify the ground rules (who decides what, based on what information, for what aim or objective), and control your feelings more in public. Also, manage using criticism and praise at right time (praise in public and, critique in private).

### Direct Reports

- 7.50. Pat doesn't treat people with the respect they deserve. She pushes hard, but could get more done with less churn if she used a softer touch.
- 8.00. I think Pat is a great leader as is. We need more of her kind of drive and relentless pursuit of results.

## Direct Reports

- 7.50. To get a higher range, Pat has to improve her way of treating people and has to learn to sometimes be more patient for her direct reports who are not always as smart/quick as she is.
- 8.00. Pat is a very good manager. Efficiency, rapidity, and courage are her greatest strengths. She could learn more about other parts of the business.
- 6.00. I think she could increase her effectiveness by showing more interest in every functional area, especially sales and marketing.
- 7.00. Because she is so intense and keen on delivering and she knows a lot about the business. She needs to focus on fewer priorities and doing less herself and delegate things.
- 8.50. She is a great operational leader. She could soften up a bit and show more appreciation for everyone's efforts.
- 8.00. Because she is able to run her business in every aspect of it. She could include people more and be more open to other ways of thinking.

## 5. What words of encouragement do you have to offer this individual?

*Note:* Each bullet represents a different respondent. Comments are presented *exactly* as submitted.

### You

- Trust myself and lighten up a bit. Learn to trust others and step back.

### Boss

- Pat has her heart in the right place. She is making strides in the right direction. My advice is to seek first to understand, then to be understood.

### Other superiors

- Pat continues to be someone we can count on. Just know that we believe in you, Pat.
- Hang in there. You have achieved a lot already, and can achieve even more.

### Peers

- Pat has a lot of gifts, and I admire her deep knowledge of operations.
- Take the leap of faith, Pat: take a chance, trust people, and see what happens. You'll be surprised by how much people can do if you show you believe in them.
- Trust your peers, Pat. We're on your side.
- I like working with Pat and think she adds a lot to our team.

### Direct Reports

- I hope Pat isn't discouraged by this feedback. It may not all be positive, but if you can take it in, you'll be the stronger leader for it.
- Pat has a very bright future. If she can add on the strategic and people-skills pieces, she will be an extraordinary leader.
- Pat, you don't have to always know everything. We already know you know a lot!
- Just remember what you already know: treat people like you want to be treated. You already have our respect.
- You have helped me raise my game by challenging me. Thank you.
- I have a lot of respect for Pat. She knows more than I will ever know about this business.
- I think Pat is one of the best leaders in the company. Keep it up!
- Trust yourself, Pat. You know what you are doing.