

Take a minute to think about your team. The intent of this assessment is to produce insight. The results are for your eyes only.

On the next page, write the names of each person on your team (this list will typically include all direct reports, as well as other key individuals in strategically sensitive areas throughout your organization). *[For confidentiality, you may prefer to use numbers or codes.]*

To the right of each name there are two columns. Fill in the circles that best reflect your experience with each of the individuals listed. In completing your assessment, you should consider the following:

■ **Performance Outcomes**

- ① Low Performer: Some people perform at a very low level.
- ② They can't (or won't) produce results. They may spend time on "activities," but fail to produce the desired "outcomes."
- ③
- ④
- ⑤
- ⑥
- ⑦ High Performer: Other people on your team are high performers.
- ⑧ You can count on them to produce the desired outcomes. They get the right things done.
- ⑨

■ **Values-Driven Behavior**

- ① Cultural Misfit: Some people create chaos when they work with others. Some want everything "their way," and some refuse to change with the times. From a values-driven behavior standpoint, they personify the worst of your organization's culture.
- ②
- ③
- ④
- ⑤
- ⑥
- ⑦ Cultural Fit: Other people fit well within your culture. They are easy to work with, and their behaviors are consistent with your organization's core values. They personify the best of your organization's culture.
- ⑧
- ⑨

For Example:

Team Names	Performance Outcomes		Values-Driven Behavior	
	Low Performer (does <u>not</u> get things done)	High Performer (produces desired outcomes)	Cultural Misfit (Personifies the worst of our culture)	Cultural Fit (Personifies the best of our culture)
1. John Doe, VP Sales	① ② ③ ④ ⑤ ⑥ ⑦ ● ⑨		① ● ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	
This response would indicate that you believe he is...		an excellent performer...	but his behavior does <u>not</u> "fit" with your organization's values	

Team Names	Performance Outcomes		Values-Driven Behavior	
	Low Performer (does <u>not</u> get things done)	High Performer (produces desired outcomes)	Cultural Misfit (Personifies the worst of our culture)	Cultural Fit (Personifies the best of our culture)
1.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
2.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
3.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
4.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
5.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
6.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
7.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
8.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
9.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨
10.	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨

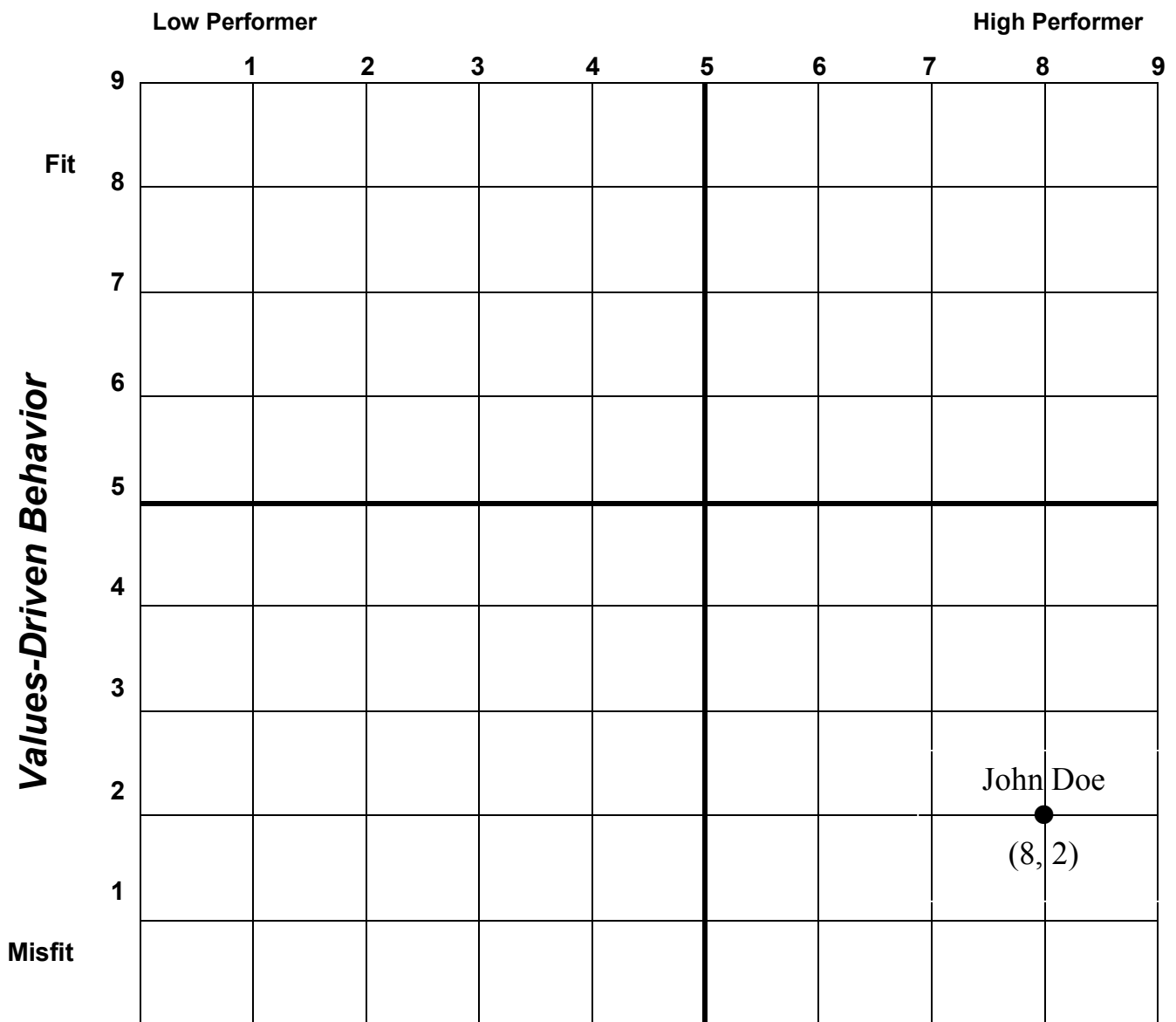
Plotting the Results

Transfer the data from the previous page to the graph below.

For example, refer to the **John Doe** data (at the bottom of page 1). We rated him an “8” on the **Performance Outcomes** axis, and a “2” on the **Values-Driven Behavior** axis. (See his position on the graph below.)

Now use your data (from page 2) to plot the position of each member of your team.

Performance Outcomes



Analyzing the Results

Values-Driven Behavior

Performance Results

	Low Performer	High Performer
Fit		★
Misfit		

The Clear Positions with Clear Choices.

■ Individuals in this quadrant are **stars**. They are high-level performers who fit easily into your culture. They are your best people. □ *They need to be nurtured, developed and rewarded.*

Values-Driven Behavior

Performance Results

	Low Performer	High Performer
Fit		
Misfit	U	

■ Individuals in this quadrant are **unacceptable**. They cannot produce results, and they are misfits within your culture. □ *They need to be outplaced.*

Values-Driven Behavior

Performance Results

	Low Performer	High Performer
Fit	Dilemma I	
Misfit		

The Noticeable Dilemmas with Tough Choices.

■ Individuals in this quadrant are typically well-liked and personify your culture. Although they are very loyal to their leaders, the world may be passing them by. It's becoming noticeable to everyone that they are not producing the results that they used to. □ *They need to be coached to improve their performance or be reassigned to a position where they can perform at a higher level. If neither is possible, you have a tough decision to make.*

Values-Driven Behavior

Performance Results

	Low Performer	High Performer
Fit		
Misfit		Dilemma II

■ Individuals in this quadrant are top performers. [Jack Welch of General Electric said that dealing with this kind of person is a difficult choice for any Leader – but it's imperative for long-term team success!] You can count on them to get things done. But they create a great deal of chaos. Almost no one “can stand” these people. In completing their work, they tear apart your culture. They play by their own set of rules. They are truly high performing misfits -- who create a lot of “walking wounded” in their wake. □ *They need to be coached to improve their behavior. If they can't, you're faced with a dilemma. Will you sacrifice your culture for this person's performance?*

The results of this assessment may demonstrate a dilemma for each leader because they typically expose a vulnerable situation. The leader (as the head of the overall organization or department) is seen as “the ultimate person accountable” for the organization’s or department’s results and the consistency of its culture. If there is a perception by the employees, customers, or other stakeholders that there are people in the organization who do not reflect the “message” that the Leader is communicating, the trust in the Leader and the organization begins to diminish -- which will jeopardize the longer-term success of the company.

For your credit union/department “stars,” establish a program that keeps them on a path of continual professional development. Also establish a program that keeps the “stars” loyal and motivated to continually help the credit union/department achieve success.

Tips for Success: Research has proven that most (75%+) of our business knowledge, our skills and the abilities we have developed are the result of personal experiences. These experiences have occurred daily for each of us, and our technical and leadership growth has been the result. Neither business success nor executive growth results from random events. To be effective, a bench strength development process must be integrated into a business strategy by:

- Aligning talent with strategic direction
- Focusing on results for specific learning and business objectives
- Providing a regular, confidential mentoring process
- Maximizing project opportunities
- Establishing a climate for learning
- Continuously reinforcing through a participative on-going process
- Building trust and teamwork

For individuals who are unacceptable employees for the credit union or department, develop a process whereby they will be outplaced.

For individuals who are your “noticeable dilemmas,” develop and implement a coaching program leading to improved performance or behaviors. This will result in more “stars” for the credit union/department, thereby eliminating your leadership “dilemmas.”

Tips for Success: Coaching is made up of the formal and informal dialogs a leader guides in support of organization, team and individual performance as well as to sustain continuous improvement.

Typical coaching behaviors include:

- Using practical methods of questioning and observation to keep aware of the work place activities and project performance of the organization, teams, and individuals
- Clarifying performance expectations and providing feedback and direction
- Helping identify improvement opportunities and providing support for continuous improvement efforts
- Supporting and recognizing work place accomplishments
- Removing barriers and constraints which inhibit an individual or team from accomplishing goals and objectives
- Teaching

The bottom line is that *everyone* will more clearly understand how to reach the Star Category. In addition, they will have the tools and support to stay there. Contact us at info@cardwellgroup.com or 800-395-1410 to see how **Connections Online** can help you by developing your STARS and coaching your noticeable DILEMMAS.