



Leadership ForecastTM
Coaching Report

Report for:

Joe Sample

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CONFIDENTIAL

Introduction

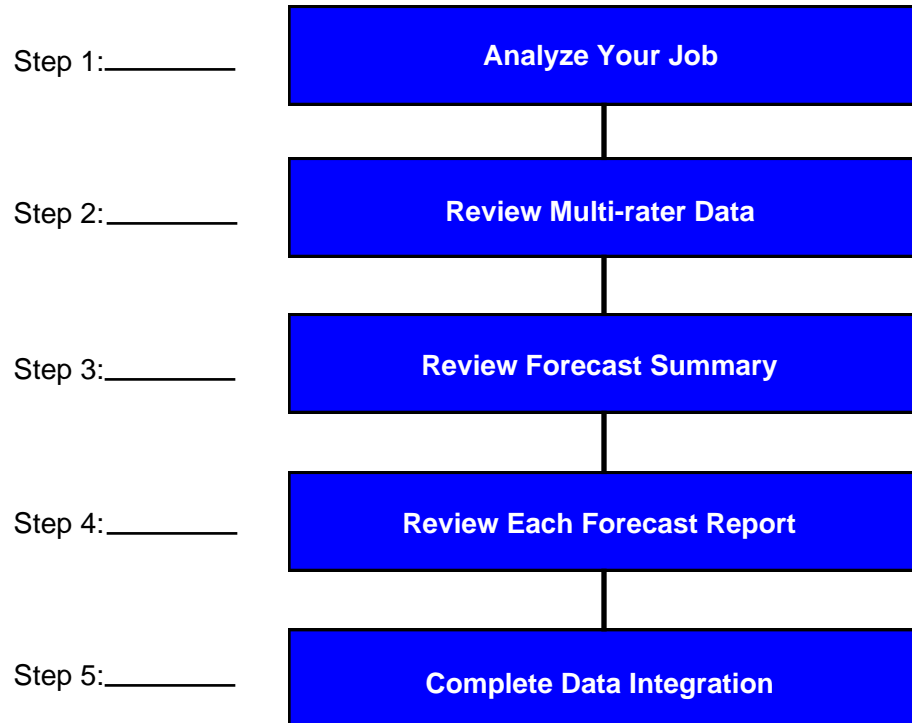
The Coaching Report is designed to guide you through the development planning process. The report will help you bring together the results from the Leadership Forecast Reports (and any other assessment data you may have) and integrate those results into a comprehensive development plan. You can make effective use of this report on your own or in conjunction with a more formal coaching process. The report includes the following components:

- Process Checklist designed to walk you through building a development plan
- Development Model that provides guidance for integrating assessment data
- Job Analysis Worksheet to better understand the target job for your development effort
- Multi-rater Worksheet to indicate 360 results or behavioral examples
- Forecast Summary that overviews the results of your Leadership Forecast Reports
- Assessment Worksheet to summarize results of your Leadership Forecast Reports
- Data Integration Worksheet to organize all results into an overall performance snapshot
- Development Planning Form to record your development information (Appendix A)

Process Checklist

The process checklist shown below outlines the steps necessary to fully understand the large volume of information you now have regarding your development and how to use the information to create a comprehensive development plan. Before you begin to build your development plan, you should carefully read the next section outlining the Hogan Development Model. The model provides an excellent overview of the steps involved in creating a development plan.

This report follows the sequence of steps listed below beginning with the section following the Hogan Development Model.



When you have completed the five-step process, you will have all the information needed to build an exceptional development plan. The final section of the report offers three options for building a development plan including a company specific approach, a simple paper-and-pencil approach, or an online system called iCoachPlus™. Regardless of the approach you select, the key to success is a commitment to change.

Hogan Development Model

General Model

One of the most difficult challenges associated with development is sifting through performance data and targeting areas for change. The Hogan Development Model is a simple way of meeting this challenge. The model has three components: Behavioral Attributes, Competency Domains, and Job Performance. Behavioral Attributes describe "why we do what we do." Competency Domains describe "what we do and how we do it." Job Performance represents the requirements necessary to be successful in a job. If you have development information on your Behavioral Attributes and Competency Domains, you can relate that information to job requirements. Accurately targeting development is a matter of choosing those areas that you can reasonably expect to change and, if you make the change, it will produce a noticeable performance improvement. The best targets are those that will produce the most improvement with the least amount of effort to change.



Job Performance

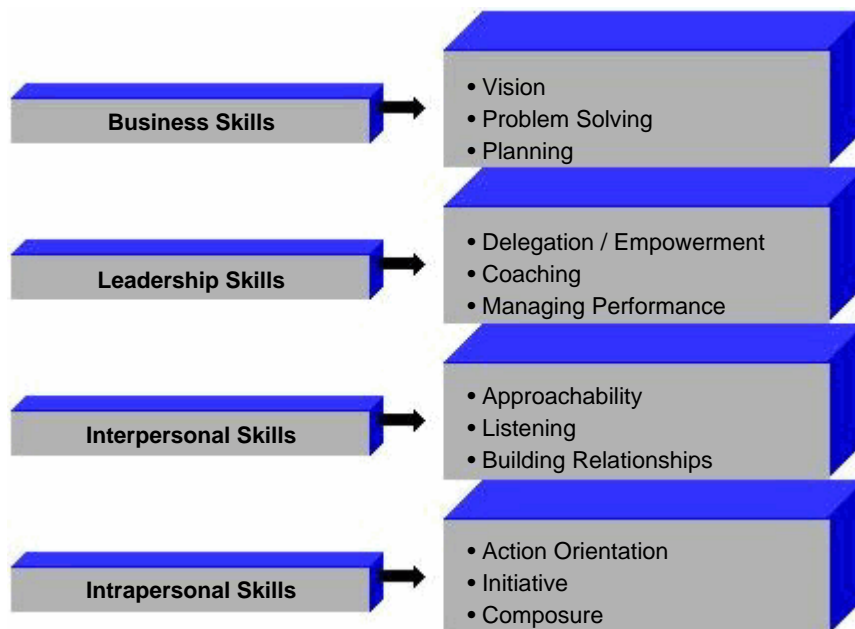
An appropriate development target should have a significant impact on job performance. If you understand the requirements of the job that impact successful performance, then targeting development is a matter of lining up the three components of the model. You should think about job requirements in terms of the Competency Domains. In other words, consider the competencies responsible for successful performance and group them according to the four domains. The domains will then serve as an organizing structure for all development planning activities. Your manager is probably the best source of information regarding those competencies most responsible for successful performance.

Competency Domains

Competency Domains are clusters of competencies that tend to go together. They are best measured using on-the-job behavioral examples obtained through feedback. This can be done systematically using a 360 rating process or by simply asking for feedback from those individuals that know your work best. Four domains capture most of the competencies that commonly occur in business. Business Skills include competencies that can be done on your own and usually are thoughtful in nature. Leadership Skills include competencies used in managing others. Interpersonal Skills encompass competencies used in getting along with others. Finally, Intrapersonal Skills refer to competencies considered to be at the core of how one approaches any work assignment.

The Competency Domains have an important developmental relationship to each other. Intrapersonal Skills develop early in life followed by Interpersonal, Leadership, and Business Skills. The earlier in life a skill is developed, the more difficult it is to change. For example, planning skills (Business Skills Domain) are much easier to develop than initiative (Intrapersonal Skills Domain). This distinction should be considered when choosing development targets.

***"What" we do and "how" we do it ...
... measured using job-related feedback***

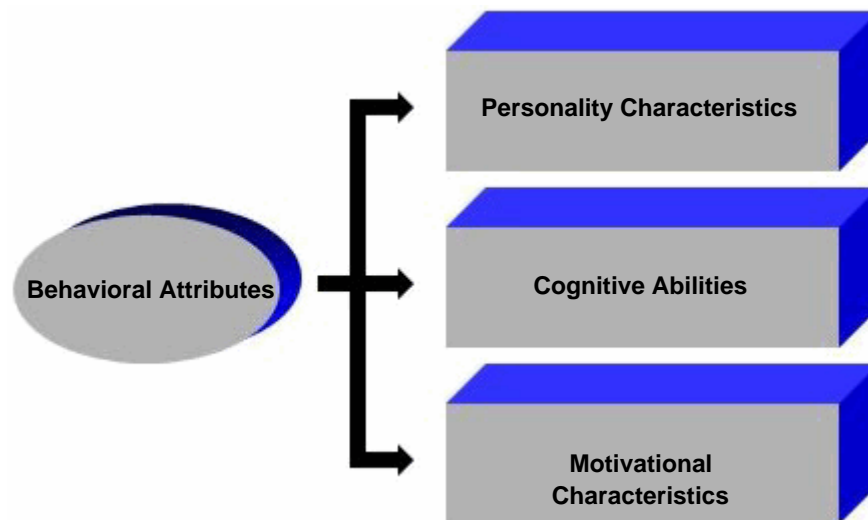


Behavioral Attributes

Behavioral Attributes are best measured by assessment inventories that are capable of looking beyond a small sample of behaviors to provide a description of "why" those behaviors occur in the first place. Behavioral Attributes are comprised of personality characteristics, cognitive abilities, and motivational characteristics. The Leadership Forecast Potential Report and Challenge Report both provide excellent measures of personality characteristics. A measure of critical thinking such as the Watson-Glaser Critical Thinking Inventory is a good measure of cognitive abilities. Motivational characteristics speak to our wants and desires and are often manifested in our values. The Leadership Forecast Values Report provides a good understanding of motivational characteristics. Understanding your personality characteristics, cognitive ability, and motivational characteristics is the foundation for development. Knowing "why you do what you do" often dictates the targets you are likely to be successful in changing. It may also dictate the change strategy with the highest probability of success.

"Why" we do what we do ...

... measured using assessment inventories



Applying the Model

You now have a better understanding of the three components of the model. The next step is to apply these components to create a high impact development plan. The following example uses a sales job to illustrate how the model works.

Sales jobs have many critical requirements including planning (Business Skills), listening (Interpersonal Skills), and initiative (Intrapersonal Skills). In analyzing the sales job, you find that initiative is the most important competency followed by listening, then planning. In reviewing Competency Domain data (from your 360 ratings), you were rated high in initiative, but low in listening and planning.

Turning to data on your Behavioral Attributes, you were somewhat low on personality characteristics associated with listening and planning. Since you have Competency Domain and Behavioral Attribute data that indicate weaknesses in listening and planning, which one should be the primary target for development? You have to use some judgment at this point. Since listening was rated as more important to success than planning, it would be reasonable to target listening. However, it is important to realize that your listening skills develop long before your planning skills and will be a more challenging development target. You essentially have to balance the development challenge with the potential impact on successful job performance. In this case, it would be reasonable to conclude that, as a sales person, listening skills take priority over planning skills.

The following pages will help you apply this model in building a development plan for your target job.

Step 1 – Analyze Your Job

The starting point in building your development plan is to identify the key requirements of your job that are responsible for successful performance. Spend a few minutes thinking about the truly important requirements for success. You may want to ask your manager just to make sure you fully understand the requirements that will lead to success.

In the space below, write down the competencies that are critical to success, grouping them according to the Competency Domains. Once you have listed them, describe in your own words what you think is the most important job requirement for each domain.

Domains	Competencies	Describe the most important requirement
BUSINESS	<ul style="list-style-type: none"> • _____ • _____ • _____ • _____ 	
LEADERSHIP	<ul style="list-style-type: none"> • _____ • _____ • _____ • _____ 	
INTERPERSONAL	<ul style="list-style-type: none"> • _____ • _____ • _____ • _____ 	
INTRAPERSONAL	<ul style="list-style-type: none"> • _____ • _____ • _____ • _____ 	

Step 2 – Review Multi-rater Data

Multi-rater data can be very important to understanding "what" you do and "how" you do it on the job. If you have multi-rater data such as a 360 assessment, you can use this section to summarize the results. If you do not have 360 data, but have feedback from your manager or others in your organization regarding your job performance, you may want to use this section to summarize that information. Skip this section if you do not have any feedback regarding your job performance.

Review your multi-rater data and think about what the results reveal about your strengths and opportunities for development in each of the competency domains. Note your strengths and opportunities in the space provided and write down the specific multi-rater item (or statement) that was most important in leading you to your conclusions.

Domains	Strengths / Opportunities	Multi-rater Items
BUSINESS	<p>Strengths:</p> <p>Opportunity:</p>	<ul style="list-style-type: none"> • _____ _____ • _____ _____
LEADERSHIP	<p>Strengths:</p> <p>Opportunity:</p>	<ul style="list-style-type: none"> • _____ _____ • _____ _____
INTERPERSONAL	<p>Strengths:</p> <p>Opportunity:</p>	<ul style="list-style-type: none"> • _____ _____ • _____ _____
INTRAPERSONAL	<p>Strengths:</p> <p>Opportunity:</p>	<ul style="list-style-type: none"> • _____ _____ • _____ _____

Step 3 – Review Forecast Summary

This section summarizes your results from the Leadership Forecast Potential Report, Values Report, and Challenge Report. The summary will prepare you to do a more detailed review of the individual Leadership Forecast Reports. This section is organized in four parts: (1) Performance Strengths; (2) Values and Drivers; (3) Challenges; and (4) a Career Development Summary. At the end of this section, there is a table containing your individual scale scores for each of the Leadership Forecast Reports.

Performance Strengths

- **Personal Impact**

You seem confident and willing to take charge of a group or project when necessary, but also comfortable letting others assume the lead role. You appear friendly, outgoing, and approachable, but you are willing to listen and let others talk.

- **Interpersonal Skill**

You are a pleasant and tolerant person, but one who will take a stand when necessary. Flexible and spontaneous, you will usually be able to change directions quickly, work on several problems at the same time, and will not mind being interrupted. You will be comfortable using new and/or non-standard procedures to solve problems, and will probably be willing to challenge rules and take risks. These characteristics are important for jobs in fast-paced environments with changing priorities and possibilities for failure.

- **Working and Learning Style**

You are stable and poised, have a positive attitude, and are usually in a good mood. You can easily handle job pressure and/or heavy work loads, and will rarely be irritable. Coworkers and team members will appreciate your steadiness; this is particularly important for jobs or tasks where there is a great deal of urgency, stress, and/or potential risk, and where it is necessary to keep emotions under control. In times of stress, your coworkers can count on you to be calm, consistent, and upbeat. You are practical, able to focus your attention, and do not get caught up in pointless abstractions. You do not seem to need a lot of variety or change at work, but you will be willing to work in a wide range of environments. These characteristics are important for jobs and tasks that require practical interests and hands-on work. You should be interested in learning new material, but will see education as a tool rather than as an end in itself.

Values and Drivers

- **Achievement Motivation**

Although you are serious about work, you also enjoy entertaining others, like variety in your life, and know how to have a good time. You do not seem interested in competition or challenges for their own sake and prefer to let your career unfold naturally—whatever happens is what happens. You do not need to dramatize your achievements, but you appreciate positive feedback and enjoy a "pat on the back" from time to time.
- **Social Interests**

You appreciate the company of others, but you also enjoy your private time and look forward to it. You probably prefer to work alone, as opposed to working on a team, and you do not like spending time giving others feedback. You prefer the company of close friends to that of strangers. You focus on your work and take a practical, matter-of-fact interest in the needs and complaints of staff. You prefer to make staff decisions based on rational business considerations rather than people's wishes and fantasies, and, as a result, you want meetings to start on time and follow sensible agendas. You typically follow established procedures and change things only when necessary—because you do not like to fix things that are not broken. You also believe that there are differences between right and wrong, and that they should be observed and respected.
- **Entrepreneurial Values**

You seem to have a sensible attitude toward money; although you appreciate its value, you are not preoccupied by compensation issues. You judge yourself in part by income potential, but you also take pride in family, friends, and leisure time activities. You have a reasonable attitude toward risk-taking versus risk-avoidance; you will take a chance when the payoff seems to warrant it, but avoid risk for its own sake. You value safety but understand that little in life is perfectly safe.
- **Decision Making Style**

You seem to strike a balance between form and function in decision making. You want equipment to look good but also to perform reliably and efficiently. You understand the trade off between elegant style and durable performance and use it in making decisions. You seem to prefer to make decisions based on experience, intuition, and insight, and you avoid "paralysis by analysis".

Challenges

- **Reactions to Others**

You seem calm and not easily frustrated; others may also find that your enthusiasm for new projects and people can be guarded at times. You seem to be quite insightful about others' motives and intentions, but somewhat thin-skinned and easily offended. Under pressure, others may see you as mistrustful, uncooperative, or argumentative. Although you are confident and willing to accept challenges, you might threaten colleagues who are more risk averse. You are a sturdy person who can stand up to criticism and adversity. Nonetheless, because you can be reserved, others may think you are aloof, detached, and unconcerned about their interests. You seem to welcome coaching, which could be a problem if you need more feedback than others want to provide.

- **Personal Performance Expectations**

Others may see you as rather modest and reluctant to speak up unless your opinion is explicitly solicited. You seem charming, interesting, fun, risk-taking, and willing to think and act quickly. In time, however, people may find you hard to work with because you can change directions so quickly, seem not to follow through on some commitments, ignore your mistakes, and expect that others will not notice your mistakes. You seem to prefer to take a low profile and to avoid the appearance of showing off. You may be reluctant to put forward ideas that others may see as radical or different.

- **Reactions to Authority**

You seem willing to let others do their work, but you may not give them needed feedback. You seem willing to make your own decisions and may need to work harder at keeping others informed about what you have decided.

Career Development

- **When Strengths Become Weaknesses—Development feedback for Mr. Sample**

In view of your unusual resilience and ability to handle pressure, remember your previous errors and mistakes in order to learn from them, and make sure you are aware that others may be stressed when you are not. You should find ways to step up to challenges, take initiative, and show enthusiasm. At the same time, you should stay focused on important organizational tasks and be results-oriented. Find opportunities to assume leadership roles while continuing to support coworkers through both words and actions. You should be reminded to talk regularly with your coworkers, to ask them questions, and seek their advice. The goal is for you to achieve a balance between the social and technical aspects of work. You should anticipate others' expectations during interactions and respect their needs. You should be positive and remember that you can gain others' trust by being rewarding and honest in interactions with them. Remember to be patient when others make mistakes—typically, others do not make errors on purpose. Because you sometimes do not pay attention to details, you should make a list each day of things to accomplish. Be sure there is a system in place to follow-up on loose ends and commitments to customers and coworkers. You should make a special effort to complete tedious tasks and be sure to gather enough information before making important decisions. From time to time, remind yourself to think and talk about the big picture, the vision, or the strategy that drives the company or business unit. You also may benefit from remembering how research and innovation helps the organization compete. You should develop a plan for self-improvement and implement a system to check progress periodically. Find ways to stay current in the field and be alert for opportunities to learn new skills and develop competencies.

- **Dealing with Derailment Tendencies**

- First, other people may think that you follow your own agenda and do not consider how your decisions impact them. As a result, they may be as reluctant to make commitments to you as you seem to be in return. Thus, you need to be careful to follow through on all your good faith commitments.
- Second, when you find circumstances have altered the conditions under which you made a commitment, make sure you negotiate the changes with the person to whom you have made the promise—rather than simply going on about your business.
- Third, you tend to have a higher tolerance for risk than most people. Understand that not everyone is as adventurous as you seem to be.
- Fourth, realize that you may have disappointed others by not following through. You need to acknowledge your errors and make amends—rather than trying to finesse the situation.
- Finally, remember your strengths—at your best, you are charming, spontaneous, and fun. You adapt quickly to changing circumstances, handle ambiguity well, add positive energy to social interactions, and people like being with you.

Summary of Scores from Your Leadership Forecast Reports

Scale	%	Scale Interpretation
Hogan Personality Inventory		
Adjustment	89	Concerns composure, optimism, and stable moods.
Ambition	47	Concerns taking initiative, being competitive, and seeking leadership roles.
Sociability	59	Concerns seeming talkative, socially bold, and entertaining.
Interpersonal Sensitivity	60	Concerns being agreeable, considerate, and skilled at maintaining relationships.
Prudence	21	Concerns being conscientious, dependable, and rule-abiding.
Inquisitive	27	Concerns being curious, imaginative, visionary, and easily bored.
Learning Approach	58	Concerns enjoying formal education and actively staying up-to-date on business and technical matters.
Motives, Values, Preferences Inventory		
Recognition	46	Desire to be known, seen, visible, and famous.
Power	33	Desire for challenge, competition, achievement, and success.
Hedonism	82	Desire for fun, excitement, variety, and pleasure.
Altruistic	12	Desire to serve others, to improve society, and to help the less fortunate.
Affiliation	22	Need for frequent and varied social contact.
Tradition	78	Concerns for morality, family values, and devotion to duty.
Security	60	Need for structure, order, and predictability.
Commerce	53	Interest in earning money, realizing profits, and finding business opportunities.
Aesthetics	48	Interest in the look, feel, sound, and design of products and artistic work.
Science	25	Interest in new ideas, technology, and a rational and data-based approach to problem solving.
Hogan Development Survey		
Excitable	36	Concerns being overly enthusiastic about people/projects, and then becoming disappointed with them.
Skeptical	73	Concerns being socially insightful, but cynical and overly sensitive to criticism.
Cautious	48	Concerns being overly worried about being criticized.
Reserved	83	Concerns lacking interest in or awareness of the feelings of others.
Leisurely	37	Concerns being charming, but independent, stubborn, and hard to coach.
Bold	24	Concerns having inflated views of one's competency and worth.
Mischievous	93	Concerns being charming, risk-taking, and excitement-seeking.
Colorful	18	Concerns being dramatic, engaging, and attention-seeking.
Imaginative	58	Concerns thinking and acting in interesting, unusual, and even eccentric ways.
Diligent	10	Concerns being conscientious, perfectionistic, and hard to please.
Dutiful	59	Concerns being eager to please and reluctant to act independently.

Step 4 – Review Each Forecast Report

The Leadership Forecast Reports are designed to help you understand "why" you do what you do. There are three reports in the series including the Potential, Challenge, and Values Reports. Use this section to record strengths and opportunities as identified in the Leadership Forecast Reports.

In the previous step, you reviewed a summary of the three Leadership Forecast Reports. You are now ready to complete an in-depth review of the individual reports. We suggest you read all three reports before completing this section. Once you have read the reports, you should go back, and beginning with the Potential Report, review and record strengths and opportunities for development in each of the competency domains. Do the same for the Challenge and Values Reports. Keep in mind that it is not necessary to list something in every box. Only record the strengths and opportunities that are pertinent to your job success.

Domains	Potential Report	Challenge Report	Values Report
BUSINESS	Strengths: Opportunity:	Strengths: Opportunity:	Strengths: Opportunity:
LEADERSHIP	Strengths: Opportunity:	Strengths: Opportunity:	Strengths: Opportunity:
INTERPERSONAL	Strengths: Opportunity:	Strengths: Opportunity:	Strengths: Opportunity:
INTRAPERSONAL	Strengths: Opportunity:	Strengths: Opportunity:	Strengths: Opportunity:

Step 5 – Complete Data Integration

You have now completed an analysis of your job, reviewed your 360 results, and reviewed your assessment results. You have all the data you need to identify some high impact development targets. First, use your overall impression of the data to identify any behaviors that you believe need to change to improve your job performance. Record those behaviors in the right-hand column under the appropriate domain. It is not necessary to list something in every box. Record only those behaviors that indicate a clear need for attention. Second, in the middle column record the actual 360 items (or statements) that suggested a need for improvement. Finally, in the left-hand column record the Leadership Forecast Report results that help you understand "why" you exhibit these behaviors. Keep in mind, the best development targets are those that will significantly improve your job performance, you have clear data supporting the need for change, and you have acquired some insight as to "why" you exhibit the behavior.

Domains	Using the assessment data from Step 4, describe the results that indicate why you do what you do.	Using the 360 data (or statements) from Step 2, list items that led you to select behaviors needing improvement.	Describe behaviors that need to change in order to improve your performance.
BUSINESS			
LEADERSHIP			
INTER PERSONAL			
INTRA PERSONAL			

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Building Your Development Plan

There are many options for creating a development plan. Three options you should consider are outlined below.

Your company's approach

Most companies offer some form of a development planning form that can be used to document and track your personal development. In-house approaches vary widely, but usually include a place to specify development goals, action plans, and a way to document progress. The advantage of using an in-house approach is that it is consistent with what other people are doing in the organization and likely has some structure which conforms to an in-house development process.

If an in-house approach is not available or if you are looking for an alternative, the following two approaches should be considered.

Development Planning Form

For those interested in a simple paper-and-pencil approach that does not require a large time investment to create, we have provided a planning form that is located in Appendix A. Based on the information you recorded in Section 5, you should identify one or two development goals and record them in the first column of the form. A good development goal is one that is stated in behavioral terms and can be measured over time to ensure progress. Development action items can be listed in the second column and progress toward achieving the goal can be recorded in the subsequent columns over time. If you need suggestions for development actions, the Internet provides a rich source of information. An inverted pyramid approach is recommended to complete a successful Internet search. Begin with a specific development question, perhaps even the goal you have selected. Work backward using less specific search questions until you locate information that you find useful. This approach often reduces search time on the Internet and improves the probability of finding information directly related to your development goal.

iCoachPlus™

iCoachPlus™ is an online development planning and tracking system. The information that you developed using this report can be directly entered into iCoachPlus™. Once you have entered your development information, the system acts as an online coach helping you monitor your progress and stay on track to achieve your development goals. You will receive specific instructions for using iCoachPlus™ with this report if your company has purchased access to the system for you. If you do not have access to iCoachPlus™, you can contact Hogan Assessment Systems at 800-756-0632 for further information or to gain access to the system.

Appendix A – Development Planning Form

	Development Actions	Results		
		3 Months	6 Months	9 Months
Goal				