# Cleaver DISC and Emotional Intelligence Training Manual



2018

Focus on You!

# FOCUS ON YOU!!! "KNOWING THYSELF IS THE BEGINNING OF ALL WISDOM"

- Aristotle

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NOTES:

# Agenda

NOTES:

# WELCOME

# AGENDA

# **Goals and Chartering**

GOALS	CHARTERING	NOTES:

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# Leadership

NOTES:

# WHO DO YOU ADMIRE AS A LEADER AND WHY?



DO THEY HANDLE ANY OF THESE PARTICULARLY WELL?-





PROCESS	

# > POLICY/PROCEDURE

# Manager vs. Leader

	NOTES:	
EIGHT FUNCTIONS OF A MANAGER	EIGHT FUNCTIONS OF A LEADER	
<ol> <li>PERSONAL PRODUCTION</li> <li>EXPEDITING</li> <li>ORGANIZING</li> <li>TRAINING</li> <li>SUPERVISING</li> <li>PLANNING</li> <li>STAFFING</li> <li>ANALYZING</li> </ol>	<ol> <li>CREATES "CHANGE"</li> <li>VISION</li> <li>STRATEGIES</li> <li>PERSUADES</li> <li>BUILDS COALITIONS</li> <li>SERVES ALL</li> <li>ALIGNS</li> <li>CHANGES CULTURE</li> </ol>	
* COPES w/ COMPLEXITY * STABILITY * DEFINED BOX * DEDUCTIVE PROBLEM SOLVING	* COPES w/ CHANGE * THINKS BEYOND THE BOX * INDUCTIVE PROBLEM SOLVING	

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NOTES:

# **Behavior - Values - Cultures**

**BEHAVIOR**... How they do things VALUES... Why they do things **CULTURES...** Where they do things

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NOTES:

# **Job Success Indicators**

# \* JOB SUCCESS INDICATORS \*

1.	EDUCATION	
2.	WORK EXPERIENCE	
3.	MENTAL AGILITY	
4.	PROFESSIONAL CHARACTER	
5.	FINANCIAL ACUMEN	
6.	<b>COMPUTER / RELATED TECHNOLOGY SKILLS</b>	
7.	BEHAVIOR	
8.	<b>MOTIVATING FACTORS / VALUES</b>	
9.	CAREER INFLUENCES	
10	. MATURITY	
11	. PROFESSIONAL CONTACTS	
12	. PERSONAL PROJECTION	
13	. COMMITMENT	

# **Behavior**

### **BEHAVIOR**

- PAST BEHAVIORS ARE EXCELLENT PREDICTORS OF FUTURE ACTIONS
- A RESPONSE TO AN ENVIRONMENT
- HOW TASKS ARE DONE
- INNATE OR LEARNED
- PHYSICAL OR PSYCHOLOGICAL
- DIFFICULT TO CHANGE

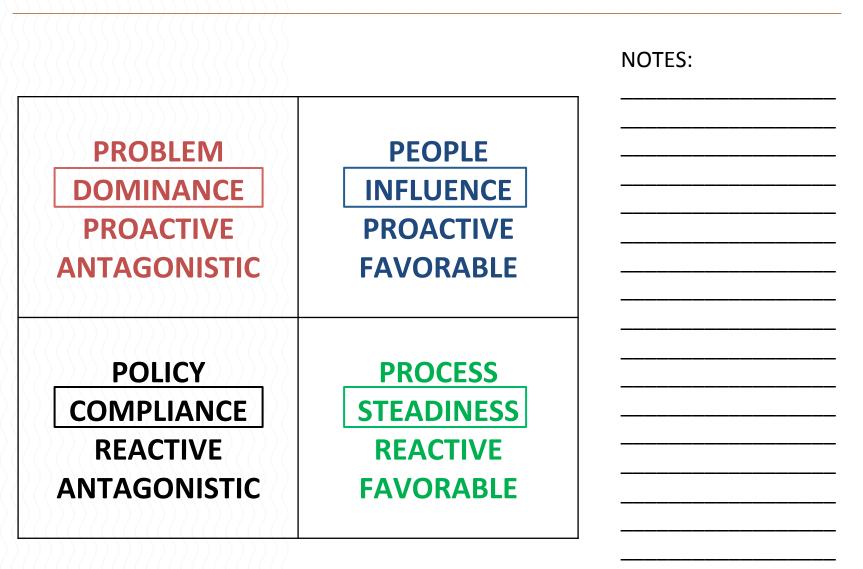
AT CLEAVER, WE BELIEVE THAT "FIRMS HIRE ON SKILLS AND EXPERIENCE, AND FIRE BASED ON 'FIT'... FIT WITH THE MANAGER, THE TEAM, AND FIT WITH THE CULTURE AND VALUES." ¢

NOTES:

# **Marston's Research**

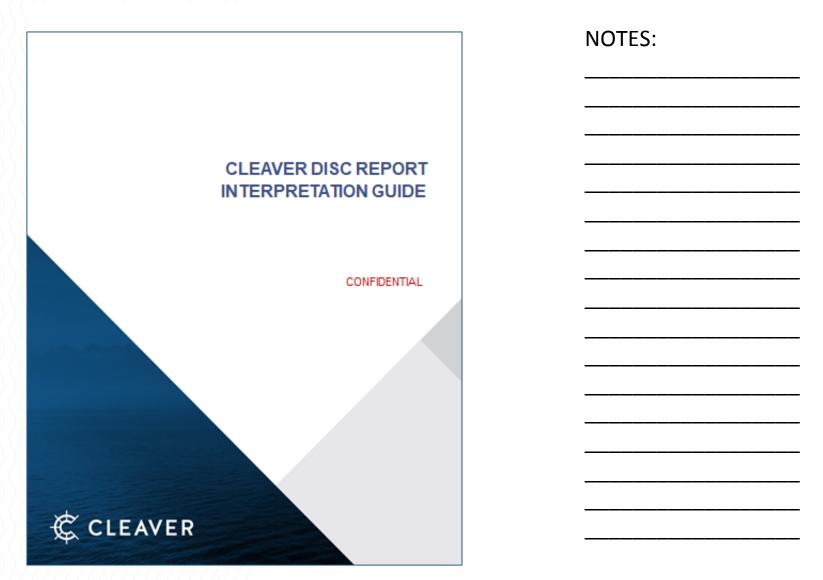
	N 1920-30's OR WILLIAN	s WORK BY M MARSTON	NOTES:
	E DETECTOR ONDER WOI NOTIONS OF	MAN NORMAL PEOPLE	
SITUATIONS: A RESPONSES: PI		TIC vs. FRIENDLY 5. REACTIVE	
- POST WW II -			
	OMINANCE =	DRIVE TO ACCOMPLISH IN SPITE OF OBSTACLES OR ANTAGONISTIC CIRCUMSTANCES	
PEOPLE = IN	IFLUENCE =	INFLUENCING OTHERS TO ACT POSITIVELY	
PROCESS = ST	TEADINESS =	PRODUCE CONSISTENTLY & PREDICTABLY	
POLICY = CO	OMPLIANCE =	CAREFUL ADHERENCE TO EXACTING STANDARDS TO AVOID ERROR, DANGER OR RISK	

# DISC



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# **Cleaver DISC Interpretation Guide**



# Behavior: T, M, L Profiles and HFJD

#### **BEHAVIOR** NOTES: A person's behavior is measured against four dimensions: D, I, S, C. D stands for **Dominance** and measures how one deals with problems. I stands for **Influence** and measures how one deals with other people. S stands for Steadiness and measures how one deals with routine and pace. C stands for Compliance and measures how one deals with policy or procedure. There are 5 graphs related to behavior: The **T** pattern graph represents the total or everyday observable behavior of the individual. ٠ The **M** pattern graph is what current changes are occurring in the individual's behavior (what they are ٠ motivated to change). The L pattern graph is how the individual behaves in extreme situations such as stress. This is the least observable but tends to be the most accurate depiction. **HFJD by Incumbent** graph is how the individual sees the job. **DO THEY MATCH? HFJD by the Supervisor** is how the Supervisor sees the job. SelfDISC SelfDISC SelfDISC 🔶 (T) Pattern 🔶 (M) Pattorn 🔶 (L) Pattorn 100 100 100 80 80 60 60 60 40 20 Ś T = Total M = Motivated L = Latent Incumbent HFJD Supervisor HFJD 100 90 -90 80 80-70 70-60. 60 -50 50 -40 40 30 30 20 20 -10 10

# **DISC** Outstanding Characteristics

#### **OUTSTANDING CHARACTERISTICS**

#### Dominance

- **High D:** Loves a challenge, comfortable in antagonistic situations, takes risks, makes decisions with ease, direct and straightforward in encountering others, adventurous. May be overbearing, overly critical, reckless, risky, impatient.
- Low D: Seeks peace and harmony, prefer to let others take initiative in antagonistic situations, will sacrifice to accommodate others, avoid risk, more comfortable with indirect approaches, patient, calm. May need support in antagonistic situations, need clear directions, may be not comfortable making big decisions, need more practice with encounter.

#### Influence

- **High I:** Outgoing, positive, optimistic, motivated by others, enthusiastic, willing to help others with projects, meet people easily, articulate. May be too trusting of others, shallow or superficial, inconsistent in order to please everyone.
- Low I: Logical, objective, seek understanding of things and how they work, analytical, prefer to work alone, good at figuring things out themselves. May be critical of themselves, seem withdrawn to others, struggle with relationships and first impressions.

#### Steadiness

- **High S:** Follows through with work, works steadily, keeps routines, easygoing, relaxed, patient, consistent, not easily triggered. May struggle in new environments or change, not be comfortable with many projects at once, can be possessive, may not be inclined to go above "status quo."
- Low S: Flexible, on the move, likes variety and changing environments, multi-tasking, look for new and different. May be disorganized, not follow through with all projects, be hard to locate at times, take on too much.

#### Compliance

- **High C:** Comfortable with following policy and procedure, likes systems, steps, peaceful, adapt to avoid antagonism, seek appreciation, loyal, cautious, makes good educated decisions. May be too much of a perfectionist, not comfortable taking risks, may be too reflective, may not have a lot of self-confidence (dependent on policies, procedures, etc.)
- Low C: Independent, adventurous, free spirit, can wing it easily, prefer to be measured by end results, unconventional, ready to try anything. May be a rule-breaker, not easily mimicked (when training or teaching others), may be frustrated with more conservative styles.

# **Behavior Combinations** (HF = Functional, SD = Behavioral Descriptions)

BASIC COMBINATIONS OF BEHAVIOR	NOTES:
The HF paragraph is written in terms of the functional job requirements.	
The SD paragraph is written to indicate the behavioral aspects of the job as well as the expected behavior of the individual possessing these characteristics.	
D/I = Creative / Direct	
<ul> <li>HF – Challenging situations require exploring the unknown or untried and coming up with unique or imaginative solutions to problems. This approach is usually oriented to technical, abstract or conceptual areas. Original solutions must be attained in the realm of things or ideas. In lower level jobs, the problems tend to be limited to equipment, tools or things.</li> <li>SD – He/She tends to be logical, critical and incisive in his/her approach to attaining goals. He/She would be most challenged by problems requiring original and analytical effort. He/She may be blunt and critical with people.</li> </ul>	
D/S = Urgency / Scope	
<ul> <li>HF – Tangible, measurable results must be obtained despite opposition or resistance to their accomplishment. There is pressure to meet deadlines in an environment laced with a wide variety of problems and unexpected interruptions.</li> <li>SD – He/She responds quickly to a challenge and has mobility and flexibility in his/her approach. He/She tents to be a versatile self-starter who responds rapidly to competition.</li> </ul>	
D/C = Authority / Individuality	
<ul> <li>HF – Antagonistic situations require taking direct and positive action where there may be little or no precedent. The job carries freedom to act and the authority to make decisions, even when these decisions may be unpopular. Note: Always pay attention to the "Authority Issue" in jobs.</li> <li>SD – He/She acts positively and directly in the face of opposition. A forceful individual, he/she will take a stand and fight for his/her position. He/She is willing to take a chance and may even overstep prerogatives.</li> </ul>	
I/D = Goodwill	
<ul> <li>HF - Situations involving people require creating and maintaining good will as well as making a good impression both personally and for one's company. This job features a "soft sell" and long range or relatively intangible results. Cultivating new relationships is generally required. The approach is indirect.</li> <li>SD - He/She tends to behave in a poised, cordial manner displaying a "social assertiveness" in situations perceived by him/her to be favorable and unthreatening. He/She tends to exude charm and strives to establish rapport at first contact with people.</li> </ul>	

# **Behavior Combinations** (continued)

#### I/S = Contact-ability

• **HF** – The job environment requires actively influencing and motivating a variety of people in changing situations. Active generation of many contacts with people is usually required. Selling a product or a concept must be accomplished gaining willing acceptance.

• **SD** – He/She tends to seek out people with enthusiasm and spark. He/She is an outgoing person who displays a contagious optimism and tries to win people through persuasiveness and emotional appeal.

#### I/C = Self-Confidence (projected)

• **HF** – Contact situations require motivating and influencing people where there is little protocol or precedent available to serve as a guide. He/She must be able to meet each situation with people on his/her own. He/She may be required to commit him/herself to taking a position which is controversial. (Emphasized in combination with high D, adding authority to confidence.)

• **SD** – He/She projects self-confidence most of his/her dealings with others. Although always striving to win others to his/her position, he/she is reluctant to give up his/her own point of view. He/She feels that, despite any obstacles, he/she will be able to act in order to attain success.

#### S/D = Patience

• **HF** – Job environment requires consistent performance in a highly structured, specialized, predictable climate. The job may have very little variation on a day-to-day basis. Problem solving is typically limited to the area of specialty. The cycle is often relatively short. Skill levels can differ widely.

• **SD** – He/She tends to be a steady, consistent individual who prefers to deal with one assignment at a time. He/She will usually direct his/her skills and experience into areas requiring depth and specialization. Steady under most pressures, he/she strives to stabilize his/her environment and reacts slowly to change.

#### S/I = Reflectiveness (Concentration)

• **HF** – Job situation requires concentration on things, ideas, concepts or equipment within a familiar area. Combined with a high D, it most often involves reflection and problem solving requiring a specialized background. With a low D, it usually involves operating equipment, gathering facts or performing various clerical or operational assignments.

• **SD** – Tends to be a patient, controlled individual, he/she moves with moderation and deliberateness in most undertakings. Even under stress, he/she will usually project a relatively unruffled, unconcerned appearance. He/She approaches most situations with care and concentration.

#### S/C = Persistence

• **HF** – Assignments in this job require independent activity in specialized areas. The incumbent has authority to act; however the authority is limited to the subject in which he/she is expected to be an expert. In rare cases, it may indicate a very repetitious job with little room for error. (This would be in combination with a low D and low I.)

• **SD** – He/She tends to be a persistent, persevering individual who is not easily swayed once he/she has made up his/ her mind on any matter. He/She will set his/her own pace and stick with it. He/She can be rigidly independent when force is applied to make him/her move, exasperating others to want him/her to adapt.

# **Behavior Combinations** (continued)

#### C/D = Adaptability

• **HF** – Avoidance of trouble is the keynote of this job. The incumbent is expected to act with caution in conformity with rules, regulations, and protocol. In combination with a high I, avoidance of trouble with people should be stressed. In combination with a low I, avoidance of trouble with things is highlighted; therefore, accuracy, precision and attention to detail are featured. Note: Always pay attention to the "Authority Issue" in jobs.

• **SD** – He/She tends to act in a careful, conservative manner and is generally willing to modify or compromise his/her position in order to achieve his/her goals. A strict adherer to policy, he/she may appear arbitrary and unbending in following a set rule or formula. He/She desires harmony and prefers an atmosphere free from antagonism.

#### C/I = Perfectionism

• **HF** – Job demands avoidance of trouble with things. Attention to detail and precision are required to insure that standards are met accurately and without error. Use of formulae, gathering of facts, and inspecting to specification are representative job samples.

• **SD** – This person tends to be a stickler for systems and order. He/She makes decisions based on proven precedent and known facts. In all his/her activity, he/she tries to meticulously meet standards that have been established by either himself/herself or others.

#### C/S = Alertness / Awareness

• **HF** – Concern for the consequences of action and alertness to quality are key components in this job. The position may involve a variety of activities in which stress is placed on accuracy or awareness of protocol or regulations, yet there is an urgency to "do something"

• **SD** – This individual would be concerned with avoiding risk or trouble. Tension may be evident particularly when he/ she is under stress for results. Generally, uneasiness is evident until he/she has absolute confirmation of the correctness of his/her action or decision.

#### D=C = Ambivalence / Vacillation

"When active dominance and active compliance, evoked by the same stimulus, take place simultaneously, they tend to cancel each other out, or at least, mutually to modify one another."

- Emotions of Normal People by William Moulton Marston

#### High D with High C

- **HF** This job involves coming up with proposed solutions to problems and critically analyzing the pros and cons of any particular solution. It may require checking and double checking, with the final action being the presentation of a balance sheet listing advantages and disadvantages. The job carries no authority to implement action. RED FLAG: Many times this combination indicates responsibility for results without the necessary authority to act in order to effectively achieve those results. Note: Always pay attention to the "Authority Issue" in jobs.
- **SD** Since this individual has an equal striving for accomplishment and quality, he/she is often seen as a perfectionist. In a positive sense, this is a person who will not accept "any answer" to a problem, but strives

# **Behavior Combinations** (continued)

for the "best answer". It could be the case however, that the individual finds it difficult to make decisions. External signs of this situation are tension and vacillation.

#### Low D with Low C

• HF – This rarely occurs in jobs. When present, it usually indicates no problem solving and little possibility of error where quality is not of particular importance.

• SD – This person tends to be resistant to demands for adaptability from others. He/She prefers to operate on his/her own but is not inclined to fight for his/her independence. He/She is often unwilling to go along with suggestions from others although he/she may not have an alternate plan to propose.

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# **Motivating Values**

# "...INDIVIDUAL JUDGMENT ABOUT WHAT IS IMPORTANT TO US IN EVERYDAY LIFE"

VALUES



# **Motivating Values – The WHY We Do Things**

#### Motivating Values

The Motivating Values graph shows which of the 6 key values are high and low for the individual. The numbers tell us the strength of the value but it is best to identify the top 2 or 3 in relation to the other 3 or 4 values instead of focusing on the numbers. Lower ranked values do not mean they are not valued; they simply fall under the others in importance.



NOTES:

#### Theoretical

- **<u>High T</u>**: Interested in a logical, sequential process of reasoning. Intellectualizes, arranges and interrelates everything into a logical system. Objective, critical, and seeks the facts. Prefers ideas and things to people.
- Low T: Forms opinions on subjects or situations quickly. Feels that instincts are right and not a great deal of investigation is required. Tends to accept things at face value. Deals with feelings and opinions instead of facts.

#### Economic Does the individual like and understand business?

- High E: Interest in economic gain. Sees all objects, things, and ideas in their environment as a part of materialist structure. Practical, look for utility and investment potential.
- Low E: Reveals a disregard for material things, prefers more intangible concepts of personal service and spiritual relationships. Wants to help the underdog.

#### Aesthetic

- High A: Seeks artistic beauty or creativity in cultural areas of expression. Sees form and harmony, grace, and symmetry, wants freedom to create "their own thing". Can be a perfectionist about design, color, and detail.
- Low A: Not concerned with aesthetic beauty or taste. Tends to be practical and pragmatic. Judges objects, things, or programs by their usefulness or production of financial return.

#### Social Does the individual favor people over business necessity?

- <u>High S</u>: Altruistic feeling for all people. Represent their end product rather than a means to the end. Seek selflessly to improve the welfare of others by serving them. Actions impelled by social justice.
- Low S: Tends to be unconcerned with underprivileged people who have less material goods and wealth. Believes each person gets what he/she deserves. Lack compassion for strangers. Other values can produce biases against people.

#### Political

- <u>High P</u>: Seek power and status. Seek to be places above others in the organization hierarchy structure. Enjoy being influential and are excited by personal recognition.
- **Low P**: Conscious of the risk of the drive for power and shun the required contacts with "undesirable" people or situations. Power is not worth the adversities one must face to gain it. May exhibit leadership behind the scenes to champion a cause.

#### Regulatory What is their moral compass? What keeps them morally grounded?

- **High R**: See to identify with a recognized force for good or to govern their lives by a code of conduct. "Right" or "Wrong" is important to them. Tend to be corporative and self-controlled.
- Low R: Independent, individualistic. Wants to make decisions independent of established codes or customs. Can interpret the law for his/her own needs and to rationalize to justify their individualistic actions.

# **Other Values**

# VALUES

Service Loyalty Duty **Balance Excellence** Humor Responsiveness Caring Humility **Stewardship** Credibility Discipline **Purpose/Relevance** Honor Respect Learning Innovation

Teamwork Integrity Compassion **Forgiveness Kindness** Perseverance Trust Dignity **Spiritual** Political Aesthetic Courage Selflessness Passion Candor Competency Curiosity Greed

Grace Agility **Empathy** Accuracy **Economic Theoretical** Social **Results Responsibility** Family **Friendship Environment Diversity** Order Commonsense **Fair-play** Competition

#### NOTES:

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NOTES:

# **CEO vs. Janitor**

# THE CEO AND THE JANITOR CAN BOTH HAVE THE SAME BEHAVIOR...

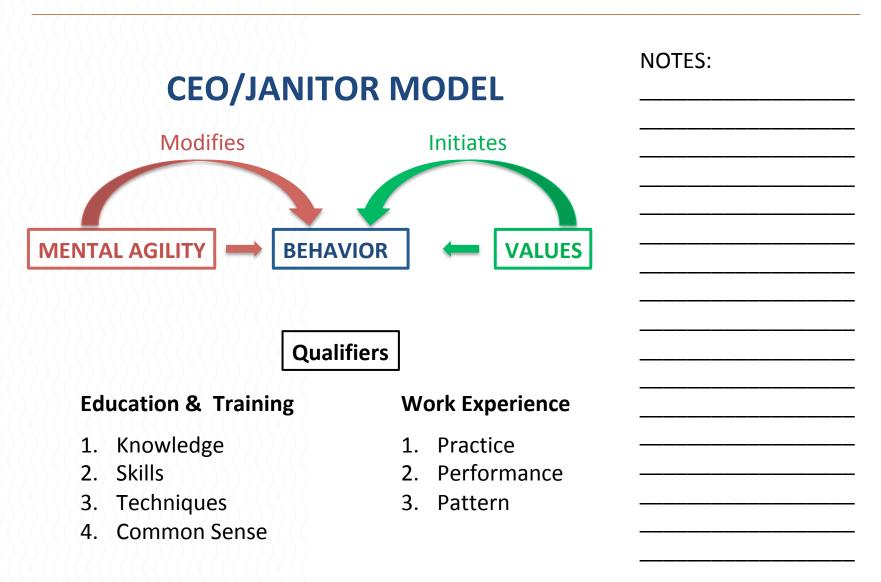
- MOTIVATING VALUES
- MENTAL AGILITY \*
- EDUCATION
- > EXPERIENCE
- INTERNAL MOTIVATION

#### \* NOT IQ BUT MENTAL AGILITY IS KEY!

The range and flexibility to think, strategize, plan, problem solve and create new ideas necessary to effectively perform critical tasks and responsibilities of a job or position.

### **"THINK UNDER PRESSURE, TRANSLATE INTO ACTION"**

# **Behavior Model**



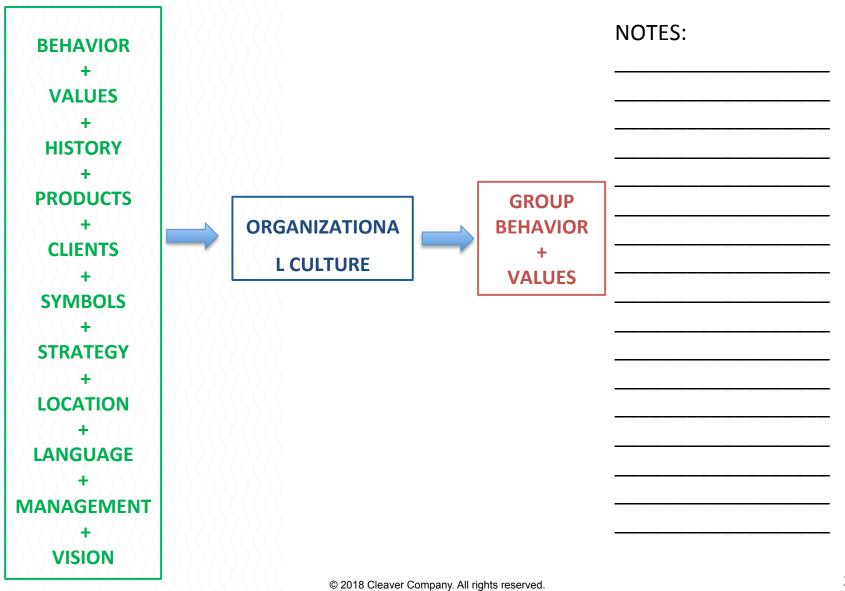
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NOTES:

# **Organizational Culture**

ORGANIZATIONAL CULTURE
ENCOMPASSES
"BEHAVIORS AND VALUES THAT
CONTRIBUTE TO THE UNIQUE SOCIAL
AND PSYCHOLOGICAL ENVIRONMENT
OF AN ORGANIZATION"

# **Organizational Culture**



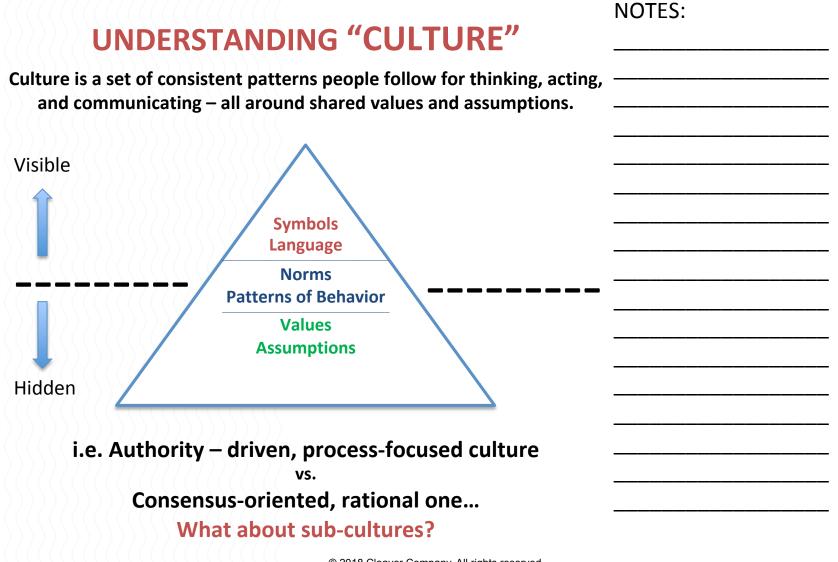
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# **Understanding Culture**



# Cultures

			NOTES:
STRONG CULTURES		20-30% of the differential in performance compared to "culturally unremarkable."	
	≻	7% lower compensation	
	≻	30% less turnover (Wikipedia)	
WEAK CULTURES		Must rely on policies and procedures	
CULTURES are:		Shared, Pervasive, Enduring, and Implicit (Silent Language)	
SUB CULTURES?			
WHAT IS THE DANG	iER	OF TOO STRONG A CULTURE?	

# **Understanding Cultural Norms**

**IDENTIFYING CULTURAL NORMS** 

Support from Patron or Peers 1. INFLUENCE... 2. MEETINGS... Address tough issues vs. rubber stamp decisions reached privately Process driven or Know right people **3. EXECUTION...** 4. CONFLICT... Can people talk openly w/o fear of retribution? Or, do they avoid conflict or push it to a lower level? 5. RECOGNITION... Is it merit or seniority driven? Is individual initiative or collaboration valued more? Are there restrictions on how you achieve 6. ENDS vs. MEANS... results? Are company Values wellarticulated?

#### CONNECTIONS ARE THERE BOTH VERTICAL (Boss & Direct Reports) HORIZONTAL (Peers)

# **Alpha Males and Females**

## **COACHING "ALPHAs"**

- 1. Natural Leaders Comfortable with responsibilities in a way non-alphas can never be.
- 2. Being in-charge is a thrill.
- 3. Independent and action-oriented.
- 4. Take high level of performance for granted both for themselves and others.
- 5. Very smart, quick, have answers early and often Responses become intuitive.
- 6. Great mid-level managers.
- 7. Their intuition is normally correct so they focus on the flaws in other's argument.
- 8. Leadership style evolves from constructive to intimidating, or even abusive.
- 9. Impatient...They read ahead... Miss subtle details.
- 10. People avoid them Work around them.
- 11. Little or no "EQ" curiosity about feelings and emotions... Feelings detract from getting the job done.
- 12. Alphas don't recognize their own emotions anger, impatience, disruption and their impact on others.
- 13. Challenge to connect with.
- 14. Female Alphas Much more collaborative and attention to feelings. They minimize conflict.

**"I'VE LEARNED THAT PEOPLE WILL FORGET** WHAT YOU SAID, **PEOPLE WILL FORGET** WHAT YOU DID, BUT **PEOPLE WILL NEVER FORGET** 

HOW YOU MADE THEM FEEL."

Maya Angelou

NOTES:

# **Emotional Intelligence**

### WHY EMOTIONAL INTELLIGENCE?

- #1 PREDICTOR OF PROFESSIONAL SUCCESS & PERSONAL EXCELLENCE – MORE THAN EDUCATION, KNOWLEDGE, OR INTELLECTUAL HORSEPOWER.
- EQ STRATEGIES ARE RESPONSIBLE FOR 58% OF PERFORMANCE IN ALL TYPES OF JOBS.
- OUR BRAINS ARE HARD-WIRED TO GIVE OUR EMOTIONS THE UPPER HAND ... SPINE > FEEL > RATIONAL THINKING.
- 90% OF HIGH PERFORMERS ARE ALSO HIGH IN EQ ... AND ON THE FLIP SIDE, JUST 20% OF LOW PERFORMERS ARE HIGH IN EQ.

# **Intelligence Quotient**

### INTELLIGENCE QUOTIENT or EMOTIONAL QUOTIENT

"PEOPLE WITH THE HIGHEST LEVEL OF INTELLIGENCE (IQ) OUTPERFORM THOSE WITH AVERAGE IQ JUST 20% OF THE TIME, WHILE PEOPLE WITH AVERAGE IQ'S OUTPERFORM THOSE WITH HIGH IQ'S 70% OF THE TIME."

# **EQ** IS THE CRITICAL FACTOR!

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# **Intelligence Quotient**

FIVE CORE FEELINGS	NOTES:
HAPPINESS	
SADNESS	
ANGER	
FEAR	
SHAME	
SELF-CONTROL DOES NOT MAKE FEELINGS OF FEAR OR ANGER GO AWAY, BUT IT DOES KEEP THOSE EMOTIONS FROM HIGH-JACKING OUR BEHAVIOR	

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NOTES:

# **Triggering Events**

TRIGGERING EVENTS

WRITE TWO OF YOUR PERSONAL TRIGGERS FOR EACH FEELING.

ASK SOMEONE WHO KNOWS YOU VERY WELL TO MAKE THE SAME LIST.

**DO THEY OVERLAP?** 

# **Emotional Intelligence Grid**

<u>Personal</u>	SELF-	SELF-	
<u>Awareness:</u>	AWARENESS	MANAGEMENT	
<u>Personal</u>	SOCIAL	RELATIONSHIP	
<u>Competency:</u>	AWARENESS	MANAGEMENT	

NOTES:

# Change

NOTES:

	WHAT	<b>CAN YOU</b>	CHANGE?
--	------	----------------	---------

IQ	<b>"ABILITY TO LEARN"</b>	FIXED	
PERSONALITY	"INTROVERT/EXTROVERT"	FIXED	
BEHAVIOR	"HOW WE DO THINGS"	FIXED	
EQ	"ADAPT TO SETTING"	CHANGEABLE!	
VALUES		CHANGEABLE!	
CULTURE		CHANGEABLE!	

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# **EQ** Foundation

EQ IS THE FOUNDA	NOTES:	
TRUST	PRESENTATION SKILLS	
ANGER MANAGEMENT	EMPATHY	
ACC SOCIAL SKILLS	COUNTABILITY INTEGRITY	
CHANGE TOLERANCE	STRESS TOLERANCE	
FLE DECISION-MAKING	CUSTOMER SERVICE	
ASSERTIVENESS	COMMUNICATIONS SKILLS	
ASSENTIVENESS	LOYALTY	

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NOTES:

# **Next Phase = Team Building**

**TRANSITION TO TEAMS** 

- 1. 360 CRITERIA
- 2. 360 RATERS
- 3. 360 PROCESS
- 4. 360 REPORT
- 5. ACTION DEVELOPMENT PLANS
- 6. TRIAD CALLS
- 7. COACHING / ACCOUNTABILITY
- 8. CHANGE IMPLEMENTATION
- 9. 360 COMPOSITE REPORT "XMAS TREES"

# **Action Development Plan (ADP)**

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#### ACTION DEVELOPMENT PLAN

NOTES:

NAME:

DATE:

	360 ASSESSMENT		DISC						
	HIGHEST RANKED SKILLS	LOWEST RANKED SKILLS	T – TOTAL (Every Day)	M - MOTIVATED (to Change)	L - Latent (Extreme)	MOTIVATING VALUES			
			D =	D =	D =	T =	S =		
			I =	I =	I =	E =	P =		
Γ			S =	S =	S =	A =	R =		
_			C =	C =	C =				

ACTION DEVELOPMENT TARGETS	TOPIC/SUBJECT OBJECTIVES/ACTION STEPS	TRAINING / EDUCATION / RESOURCES	SUPPORT & ACCOUNTABILITY	TRACKING / MEASUREMENT	TIMELINE / KEY DATES

SUCCESS LINKERS (Strategic targets/critical issues that link to performance goals/targets of your job)

DECLARATION - What do you commit to doing over the next three months to enhance the success of your targets?

## Cleaver 360 Composite – "Xmas Tree"

#### **CLEAVER 360 ASSESSMENT SKILL COMPOSITE SCORES**

_eadership Assessment Skills	Rater #1	Rater #2	Rater #3	Rater #4	Rater #5	Rater #6	Rater #7	Rater #8
APPLIED KNOWLEDGE								
Business/Financial Acumen - Technical Credibility	17							
Knowledge of Management								
MENTAL AGILITY			1					
Planning (Strategic and Tactical)	( (							
Strategic Thinking / Decision Making	77							
Judgment								
Continuous Improvement - Innovation	$\langle \rangle$							
PROFESSIONAL MANAGEMENT								
Self-Motivation	( ( _							
Use of Time (Priorities)								
Collaboration and Organizational Perspective	77							
Delegation								
Communication								
Talent / Succession Development								
EFFECTIVENESS WITH PEOPLE								
Understanding Human Behavior								
Motivation of Others	( ( ) )							
Influencing - Inspirational Leadership								
MANAGEMENT TEAM CONTRIBUTION		1	1	1	1	1		
Integrity								
Team Relationships	77							
Discipline to Achieve Standards (Individual)	(							
Company Dedication								
Change Management	//							
Executive Disposition	( )							
RESULTS						I		
Accomplishment of Objectives								
Accepting Responsibility and Accountability								

#### NOTES:

# **Cleaver Resource Executive**



**Peter Miles** has three decades of experience working as a leader in commercial banking and high tech manufacturing. He was trained by John Cleaver in 1980 in Cleaver Company's tools and methods, and used Cleaver methods to merge eight independent banks into a single bank holding company with a strong sales mentality. He joined Cleaver as a Resource Executive in 2014. Pete has also served as an Adjunct Professor, teaching business courses in finance, personnel management, and organizational behavior. He received his BS in Engineering from West Point and his MBA from the University of New Hampshire.

## Thank you!

We provide coaching, training and consulting to evolving companies who want to optimize human capital by linking thought leadership, organizational design and people development.

