



# FLIGHT 3C

## GROWING OUR LEADERSHIP



**CLEVER**

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Paul Zarookian

Executive Vice President and Chief Operating Officer  
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Congratulations, you have been selected to participate in the third of three leadership development flights that IPFS is kicking off in partnership with the Cleaver Company. The timing is right for us to continue development of key members of our leadership team, setting a standard that places high value on lifelong learning and continued individual Associate development.

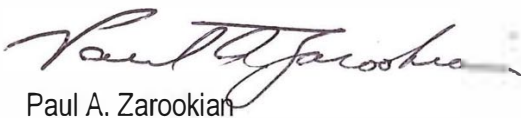
A couple of thoughts as you make the time-related commitment to this process:

- As a key leader in the organization, help us link your development work to your own success, the success of our team and the organization as a whole.
- Recognize that your full effort throughout this process will maximize both your professional and personal growth.

I see this initiative as leading two things: the company's capital investment in our balance sheet and our human resources, with both being equally critical to the company's long-term success.

I look forward to watching you grow as a leader, and serving as a role model for the company's commitment to ongoing personal development.

Thank you for your hard work and personal development focus, it enables us to all succeed.



Paul A. Zarookian

# FLIGHT DEVELOPMENT OVERVIEW

Pre-work	February	March	April	May	June	July
	Onsite Kick-Off – Full day	Call/Video	Call/Video	Call/Video	Call/Video	Close-out Dinner
Complete CleaverDISC	CleaverDISC Overview	CleaverDISC Feedback	ADP Intro	ADP Draft	ADP Completed	Recognition of Progress
Complete EQi 2.0	EQi 2.0 Overview	360 Invites sent & completed	360 Feedback	360 & EQi 2.0 Themes		No ongoing connect unless requested.
Send Feb Onsite Agenda & Overview	Group Work & Program Overview	Participant Interview // RAAM pg 1	RAAM pg 2 Intro	RAAM Draft	RAAM Completed	
	Dinner & Connection	<i>Separate Call:</i> Supervisor Interview			<i>Separate Call:</i> Triad Review w Supervisor	Hand-off to Supervisor



## Flight Expectations

Congratulations and welcome to IPFS Flight 3C! This is an opportunity to grow as a key member of the senior leadership team. This program is an investment in your development and your success in the company.

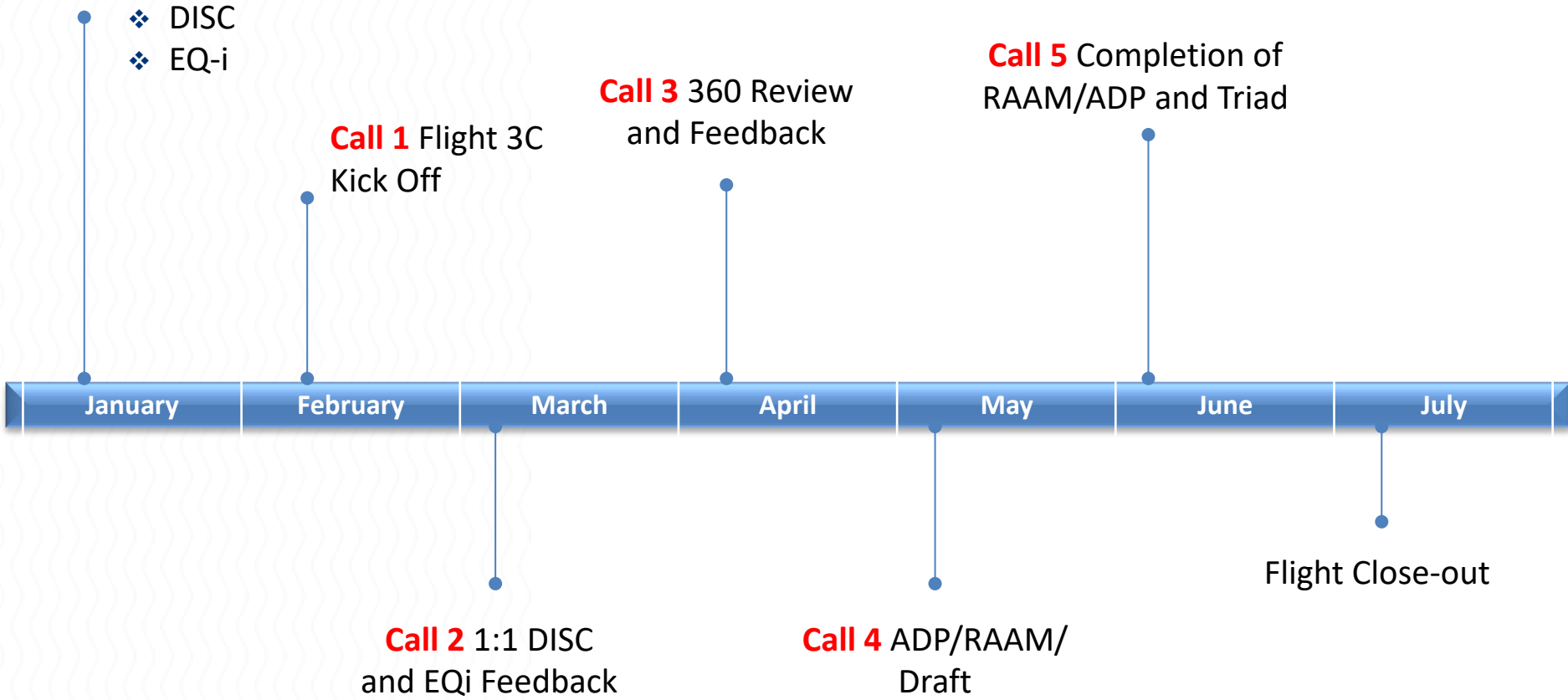
What is expected of a Flight participant?

- Do the work! While your involvement and certain tasks may seem like “extra load” on your already busy schedule, you will benefit from putting in the effort asked of you.
- Look at your own professional development as a journey rather than a stand-alone “project”. Most of you have likely been through something similar to this several times in your career; think of this next step as a stepping stone to achieving your own professional and personal goals.
- Approach this work with a commitment to honesty, open-mindedness and a willingness to move out of your comfort zone.
- Take a holistic approach to the process that focuses more on the positive outcomes of personal development, rather than the challenges that may emerge along the way.
- Set practical, daily modifications. This isn't intended to be a huge leadership makeover. It's about building on your success and creating greater impact and influence.
- Include others. Team, boss, partner, whoever...the more it's integrated into your life, the better.
- Push back – get feedback. Ask questions when you're not clear. Your coach is your dedicated Cleaver resource. The Cleaver RE is there to provide insight and support when you need it.

# IPFS Flight 3C Timeline

## Flight I Pre-Work

- ❖ DISC
- ❖ EQ-i



## Directory of Participants

**Mike Borst**



**Michael “Mike” Borst** is a Resource Executive (RE) at Cleaver Company. His passion for helping individuals succeed on both the professional and personal levels has fueled his career as an executive coach and team developer. Over the last 15 years, Mike has helped companies and non-profits in a variety of functions - from sales to client management to team development - while advancing his own work in leadership and organizational development. He has an Organizational Behavior degree from Miami University’s Farmer School of Business, a Master’s degree from Winebrenner Seminary. He currently lives in North Carolina with his wife and four boys.

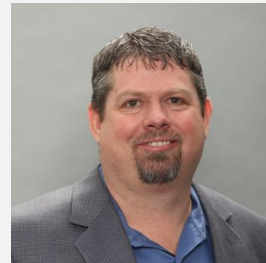
**Keith Cox**



**Bryan Mooney**



**James Block**



**Heather Garten**



**Terry Milburn**



**Rick Shaum**

Rick Shaum leads the strategic development team at Cleaver Company. His business experience, spanning several decades, has allowed him to build a reputation as a “results-oriented leader and manager” who accomplishes his objectives by recruiting and developing top talent. He has spent more than a decade working within private equity portfolio companies where he learned how these firms focus on developing enterprise value. His diverse business background has resulted in a broad understanding of core corporate functional silos including sales, operations, marketing, advertising, human resources and finance/accounting. Rick earned a Bachelor’s degree in Religion & Psychology from Vanguard University in southern California and his Master’s degree in Speech Communication from the University of New Mexico.

**Holly Mensendiek****Tarra Barrows****Jason Bailey****Michael Pritchard****Randy Hickman**



How can we use **jobs** to link organizational objectives and personal development?

# CLEAVER'S TOP MODEL





**DIAGNOSTICALLY  
INFORMED**



**COMPANY  
LINKED**



**TEAM  
BASED**



**FEEDBACK  
RICH**



**SUSTAINABLE &  
SCALABLE**

## **DIAGNOSTICALLY INFORMED**

Utilize field-validated diagnostics to provide accurate benchmarks of strengths and development opportunities

## **TEAM BASED**

Work with small participant units for maximum impact

## **SUSTAINABLE & SCALABLE**

Provide a variety of options to receive support, accountability, and continued training to sustain success

## **COMPANY LINKED**

Link individual results to company mission, vision, values, and targets at every step of the process

## **FEEDBACK RICH**

Cultivate dialogues between participants, superiors, and direct reports that encourages honest, authentic, and constructive feedback

# CLEAVER DISC REPORT INTERPRETATION GUIDE

CONFIDENTIAL

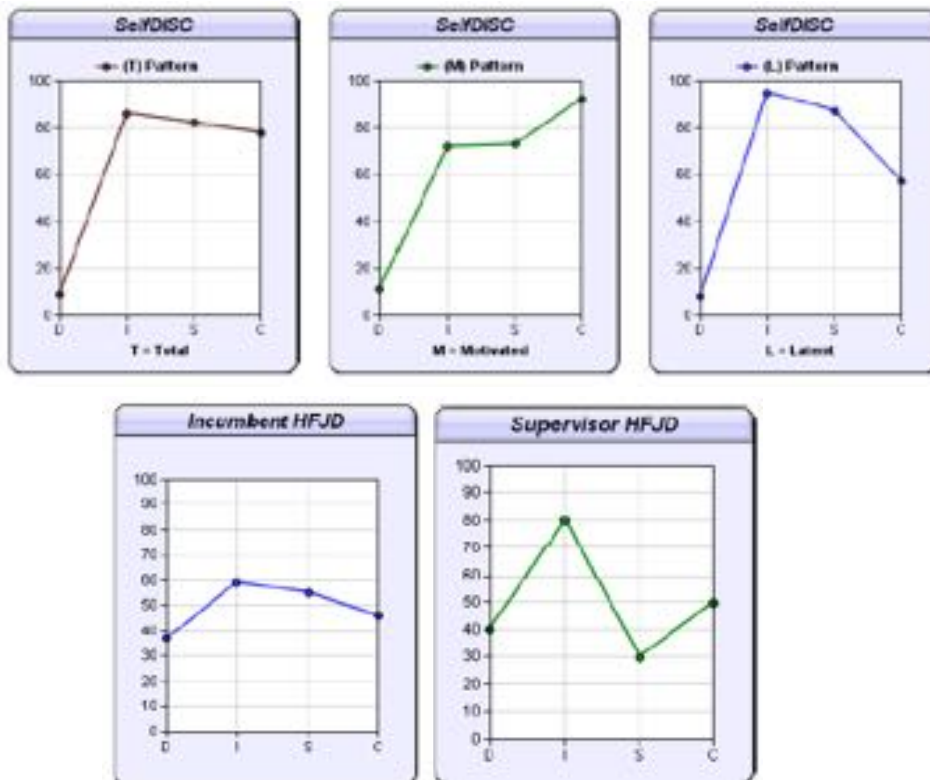
## BEHAVIOR

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.
- The **M pattern graph** is what current changes are occurring in the individual's behavior (what they are 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.
- **HFJD by the Supervisor** is how the Supervisor sees the job.





## 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 and impatient.
- Low D:** Seeks peace and harmony, prefer to let others take initiative in antagonistic situations, will sacrifice to accommodate others, avoids risk, more comfortable with indirect approaches, patient, calm. May need support in antagonistic situations, need clear directions, may be not comfortable making big decisions, needs more practice with encounter.

### Influence

- High I:** Outgoing, positive, optimistic, motivated by others, enthusiastic, willing to help others with projects, meets people easily, articulate. May be too trusting of others, shallow or superficial, inconsistent in order to please everyone.
- Low I:** Logical, objective, seeks understanding of things and how they work, analytical, prefers to work alone, good at figuring things out themselves. May be critical of themselves, seem withdrawn to others, struggles 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, uncomfortable 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, looks for new and different. May be disorganized, not follow through with all projects, be hard to locate at times, takes on too much.

### Compliance

- High C:** Comfortable with following policy and procedure, likes systems, steps, peaceful, adapts to avoid antagonism, seeks 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, prefers 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.



## **BASIC COMBINATIONS OF BEHAVIOR**

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**

- 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.
- SD – They tend to be logical, critical and incisive in their approach to attaining goals. They would be most challenged by problems requiring original and analytical effort. They may be blunt and critical with people.

### **D/S = Urgency / Scope**

- 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.
- SD – They respond quickly to a challenge and have mobility and flexibility in their approach. They tend to be a versatile self-starter who responds rapidly to competition.

### **D/C = Authority / Individuality**

- 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.
- SD – They act positively and directly in the face of opposition. A forceful individual, they will take a stand and fight for their position. They are willing to take a chance and may even overstep prerogatives.

### **I/D = Goodwill**

- 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.
- SD – They tend to behave in a poised, cordial manner displaying a “social assertiveness” in situations perceived by them to be favorable and unthreatening. They tend to exude charm and strive to establish rapport at first contact with people.

**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 – They tend to seek out people with enthusiasm and spark. They are 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 – They project self-confidence with most of their dealings with others. Although always striving to win others to his/her position, they are reluctant to give up their own point of view. They feel that, despite any obstacles, they 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 – They tend to be a steady, consistent individual who prefers to deal with one assignment at a time. They will usually direct his/her skills and experience into areas requiring depth and specialization. Steady under most pressures, they strive to stabilize their 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, they move with moderation and deliberateness in most undertakings. Even under stress, they will usually project a relatively unruffled, unconcerned appearance. They approach 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 – They tend to be a persistent, persevering individual who is not easily swayed once he/she has made up his/her mind on any matter. They will set his/her own pace and stick with it. They can be rigidly independent when force is applied to make their move, exasperating others to want him/her to adapt.





### **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 – They tend to act in a careful, conservative manner and is generally willing to modify or compromise their position in order to achieve their goals. A strict adherer to policy, they may appear arbitrary and unbending in following a set rule or formula. They desire harmony and prefer 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. They make decisions based on proven precedent and known facts. In all their activity, they try to meticulously meet standards that have been established by either themselves 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 they are under stress for results. Generally, uneasiness is evident until they has absolute confirmation of the correctness of their 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, they are often seen as a perfectionist. In a positive sense, this is a person who will not accept “any answer” to a problem, but strives



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. They prefer to operate on their own but is not inclined to fight for their independence. They are often unwilling to go along with suggestions from others although they may not have an alternate plan to propose.

**WANTS, NEEDS and POSSIBLE LIMITATIONS**
**HIGH DOMINANCE**
**Wants**

1. Power and authority
2. Prestige and position
3. Challenge
4. Opportunity for advancement
5. Accomplishments and results
6. To know why
7. Wide scope of operation
8. Direct answers
9. Freedom from controls, supervision & detail
10. New and varied activities

**Needs**

1. Negotiated commitment on a one-on-one basis
2. Identification with organization
3. To learn how to pace themselves and relax
4. Difficult assignments
5. To know what results are expected
6. Understanding of their impact on people
7. Empathy
8. Techniques based on practical experience
9. Awareness that sanctions exist
10. An occasional shock

**Possible Limitations**

1. Overstep prerogatives
2. Act recklessly
3. Inspire fear in others
4. Override people
5. Be blunt and sarcastic
6. Sulk when not in the limelight
7. Be critical and faultfinding
8. Be inattentive to little things
9. Be impatient and dissatisfied with routine work
10. Resist participation as part of a team

**LOW DOMINANCE**
**Wants**

1. Peace
2. Protection
3. Direction
4. Predictable environment
5. A leader to follow
6. A plan to understand
7. Methods
8. Freedom from conflict
9. Time to think
10. A secure future

**Needs**

1. Clear assignments
2. Directions from their manager or the book
3. Assistance in new or difficult assignments
4. A way to say no
5. Alternate methods
6. Support in the clutch
7. Techniques and tools to handle conflicts
8. A participative climate (teams or committees)
9. Appreciation for the "price" paid to perform
10. Methods to translate ideas into action

**Possible Limitations**

1. Yield position to avoid controversy
2. Hesitate to act on new problems
3. Be self-deprecating
4. Be fearful of accountability
5. Retreat when confronted
6. Be defensive
7. Allow themselves to be taken advantage of
8. Be dependent
9. Be too conservative
10. Be evasive

**HIGH INFLUENCE**
**Wants**

1. Popularity with social recognition
2. Monetary rewards to cover expenses of a social lifestyle
3. Public recognition to indicate ability
4. Freedom of speech, people to talk to
5. Favorable working conditions
6. Group activities outside the job
7. Democratic relationships
8. Freedom from control and detail
9. "Psychic" income – praise
10. Identification with an organization

**Needs**

1. Control of time
2. Objectivity
3. Emphasis on the bottom line
4. A democratic supervisor with whom he/she can associate
5. Introductions to influential people
6. Emotional control
7. Measurement of results
8. Analyzed data
9. Financial systems and control
10. More precise presentations

**Possible Limitations**

1. Be more concerned w/ popularity than tangible results
2. Over-sell
3. Act impulsively
4. Be inconsistent in conclusions
5. Make decisions based on surface analysis
6. Be unrealistic in appraising people
7. Be inattentive to detail
8. Trust people indiscriminately
9. Have difficulty planning and/or controlling time expenditure
10. Be superficial

**LOW INFLUENCE**
**Wants**

1. To be left alone
2. Logical format
3. Facts
4. Limited socializing
5. Respect
6. Straight talk
7. Puzzles to solve
8. Equipment to operate
9. Limited emotional exposure
10. Objectivity

**Needs**

1. Social skills
2. Introductions to people
3. Appreciation of the feelings of others
4. An objective manager or supervisor
5. Logical answers
6. The opportunity to ask questions
7. Sincerity
8. To soften the edge
9. Time to think
10. Feedback from others

**Possible Limitations**

1. Be aloof
2. Be blunt
3. Be critical
4. Be suspicious
5. Lack empathy
6. Hurt people's feelings
7. Be withdrawn
8. Be cool or cold
9. Prefer things to people
10. Lack social confidence

**HIGH STEADINESS****Wants**

1. Status quo
2. Security of the situation
3. Happy home life
4. Sincerity
5. Limited territory
6. A long time to adjust to change
7. Constant appreciation
8. Identification with the organization
9. Recognition for long service
10. Specialized products, programs or services

**Needs**

1. Conditioning prior to change
2. Tangible rewards
3. Fringe benefits
4. Introduction to new groups
5. A mate sympathetic to career
6. Shortcut methods
7. Established relationships
8. Packaged presentations
9. Reassurance
10. Feeling of worthwhile accomplishments

**Possible Limitations**

1. Strive to maintain the status quo
2. Take a long time to adjust to change
3. Have trouble meeting deadlines
4. Need help getting started on new assignments
5. Resist pressure to accelerate pace
6. Be relaxed and content with things as they are
7. Continue to do things the way they were always done
8. Hold a grudge
9. Wait for orders before acting
10. Have difficulty establishing priorities

**LOW STEADINESS****Wants**

1. Variety
2. Travel
3. Generalist work
4. New environments in which to work/play
5. A wide scope
6. Freedom from routine
7. Big picture approaches
8. Support troops to follow through
9. More time in the day
10. Outside activities

**Needs**

1. To pace themselves
2. Systems
3. Stick to priorities
4. Appreciation of slower moving people
5. Respect for personal property and prerogatives
6. Deadlines for completion
7. Budgets
8. Consistence
9. Retreading
10. Vacation time

**Possible Limitations**

1. Be inconsistent
2. Fail to complete what they start
3. Keep too many balls in the air
4. Over extend themselves
5. Change jobs frequently (especially early in career)
6. Be disruptive
7. Be difficult to locate
8. Have family or health problems
9. Travel extensively
10. Fail to respect others' territory, property



## **HIGH COMPLIANCE**

### **Wants**

1. Standard operating procedures
2. Limited exposure to antagonism and confrontation
3. Security (a sheltered environment)
4. References
5. Reassurance
6. No sudden or abrupt changes
7. To be part of a group
8. Personal attention
9. Shared responsibility
10. Door openers

### **Needs**

1. Precision work
2. Planning
3. More confidence
4. Wider angle and larger perspective
5. Rebuttal arguments
6. Support in the clutch
7. Explanations and more explanations
8. An exact job description
9. Encouragement to be independent
10. Self-respect

### **Possible Limitations**

1. Lean on supervision
2. Hesitate to act without precedent
3. Be bound by procedures and methods
4. Get bogged down in details
5. Defer decisions to others
6. Want full explanations before changes are made
7. Worry too much
8. Yield their position to avoid controversy
9. Be defensive when threatened
10. Be suggestible and easily led

## **LOW COMPLIANCE**

### **Wants**

1. Freedom
2. Unusual assignments
3. Independence
4. No restrictions
5. To be measured by results
6. No supervision
7. The chance to have fun
8. Exposure
9. Ventilation
10. Excitement

### **Needs**

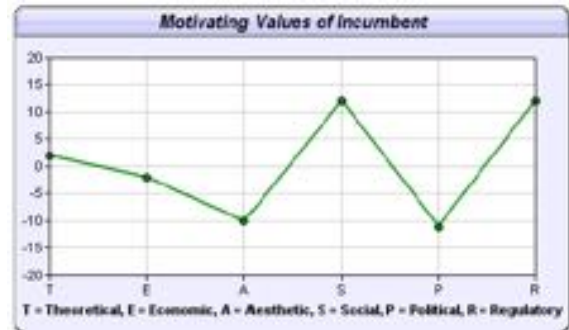
1. A tolerant manager
2. Restraints
3. Recognition that limits do exist (and why)
4. Bottom line measurement
5. Opportunity to try the untried
6. Support in detail
7. Documentation
8. Independent assignments
9. Authority
10. Life, health and accident insurance

### **Possible Limitations**

1. Be unconventional
2. Ignore instructions and directions
3. Be inattentive to detail
4. Court danger
5. Fail to document
6. Be accident prone
7. Overstep policy
8. Generate ulcers in others
9. Be reckless
10. Be oblivious

## 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.



### Theoretical

- **High T:** 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

- **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

- **High S:** 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

- **High P:** 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

- **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 their own needs and to rationalize to justify their individualistic actions.



## DISC FEEDBACK PREP WORKSHEET

**NAME:**

**COMPANY:**

1. What was your overall reaction to your DISC profile?

2. What 1 or 2 areas of your DISC Report did you find most surprising?

3. What 1 or 2 leverageable assets did you identify?

4. Please identify 1 or 2 critical issues that may hinder you from leveraging your assets.

5. What 1 or 2 focus areas would you like most to discuss during your feedback session?



# Introduction to Emotional Intelligence



EQ-i<sup>2.0</sup>  
assess. predict. perform.

# What is Emotional Intelligence?

Emotional intelligence is a set of emotional and social skills that collectively establish how well we:

- Perceive and express ourselves
- Develop and maintain social relationships
- Cope with challenges
- Use emotional information in an effective and meaningful way

It is a predictor of success in life and work



# The EQ-i<sup>2.0</sup> Model



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Based on the original BarOn EQ-i authored by Reuven Bar-On, copyright 1997.



**EQ-i** 2.0  
assess. predict. perform.

# What Does it Measure?

The EQ-i<sup>2.0</sup> measures five distinct aspects of emotional and social functioning:

- **Self-Perception** – understanding your emotions
- **Self-Expression** – expressing your emotions
- **Interpersonal** – develop and maintain relationships
- **Decision Making** – use emotions to make better decisions
- **Stress Management** – cope with challenges

# Self-Perception

Consists of the following sub-categories:

- **Self-Regard** – confidence
- **Self-Actualization** – continuous development
- **Emotional Self-Awareness** – understanding my emotions

# Self - Expression

Consists of the following:

- **Emotional Expression** – saying how you feel
- **Assertiveness** – standing up for yourself effectively
- **Independence** – standing on your own two feet

# Interpersonal

Consists of the following:

- **Interpersonal Relationships** – developing and maintaining good relationships
- **Empathy** – recognizing and appreciating how others feel
- **Social Responsibility** – contributing to society

# Decision Making

Consists of the following:

- **Problem Solving** – effectively managing emotions when solving problems
- **Reality Testing** – seeing things as they really are
- **Impulse Control** – ability to resist or delay impulses





# Stress Management

Consists of the following:

- **Flexibility** – adapting to change effectively
- **Stress Tolerance** – successfully coping with stressful situations
- **Optimism** – having a positive outlook



## CLEAVER 360 LEADERSHIP ASSESSMENT

### OVERVIEW

The Cleaver 360 Leadership Assessment is designed to provide participants with a comprehensive picture of their strengths and developmental opportunities in key functional skill areas, including insight on how they are perceived by their supervisor, other superiors, peers, and subordinates. The opportunity to get input from a well-rounded group of raters, who are typically willing to provide candid and constructive feedback due to the anonymous nature of the process, has been described as “game-changing” by participants as they work on their individual development targets and plan.

The 360 is administered through Cleaver’s cloud-based platform, with individual links sent by email to each rater, as well as to the participant who completes a self-assessment. In some cases, additional feedback may be collected through verbal interviews.

Listed below are the master categories and 21 skills that comprise the Cleaver Leadership 360 Assessment. Clients also have the ability to customize the 360 to align with their own competencies and/or to tailor the assessment to a given functional area (e.g. sales).

### CLEAVER 360 LEADERSHIP MASTER CATEGORIES AND SKILLS

#### **Applied Knowledge**

1. Knowledge of Business
2. Knowledge of Management

#### **Mental Agility**

3. Planning
4. Decision Making
5. Judgment
6. Innovation and Creativity

#### **Professional Management**

7. Self-Motivation
8. Use of Time/Priorities
9. Organizational Ability
10. Delegation of Authority
11. Communication

12. Succession Planning and People Development

#### **Effectiveness with People**

13. Understanding Human Behavior
14. Motivation of Others
15. Catalytic Leadership

#### **Individual and Team Contribution**

16. Integrity
17. Team Relationships
18. Discipline to Achieve Standards
19. Company Dedication

#### **Results**

20. Accomplishment of Objectives
21. Execution of Accountability



## CLEAVER 360 LEADERSHIP ASSESSMENT

### STEPS IN CLEAVER 360 PROCESS

1. Cleaver Resource Executive (RE) and participant review 360 process/objectives
2. Confirmation of 360 instrument/customized factors
3. Participant to submit rater roster
4. Supervisor review/edit rater roster
5. Supervisor send communication to raters asking for support of process (typically done when flight of individuals are going through 360 process; possibly done with individual 360s)
6. Email with individual links to complete 360 sent from Cleaver to raters
7. Verbal 360 interviews conducted (if needed)
8. 360 report generated and sent to participant and RE
9. 360 Feedback session with RE; identification of Action Development Plan (ADP) targets
10. ADP draft by participant and review with RE
11. 360/ADP Triad meeting scheduled with participant, RE and Supervisor

RESPONSIBILITIES	AUTHORITY	ACCOUNTABILITY	MEASUREMENT
<b>1. Growth</b> <ul style="list-style-type: none"> <li>• Internal Sales</li> <li>• External Sales</li> <li>• Unit/Premiums</li> <li>• Profit</li> </ul>			<b>Growth from existing business and achievement of annual unit and growth goals.</b> <b>Branch 2018 Budget:</b> <b>Unit Increase by X.X%</b> <b>Premium Increase by X.X%</b>
<b>2. Profit Management &amp; Leadership</b>			<b>2018 Budget Profit of \$X.XX</b> <b>Overall NIBT and individual under-performing Branch results.</b>
<b>3. Operational Efficiency</b>			<b>Accts Per Employee (APE) = X</b> <b>Cost Per Acct (CPA) = X</b>
<b>4. Receivable Management</b>			<b>Late charge Hit Ratio = X</b> <b>Charge-offs Ratio = X</b> <b>Cancellation Ratio = X</b> <b>Over 60 Days Ratio = X</b>
<b>5. Compliance</b> <ul style="list-style-type: none"> <li>• Fraud</li> <li>• Audit Standards</li> <li>• BPG</li> <li>• Regulatory</li> </ul>			<b>Fraud Reports</b> <b>Internal Audit Scoring</b>

RESPONSIBILITIES	AUTHORITY	ACCOUNTABILITY	MEASUREMENT
<b>6. Client Relationships / Legendary Service</b>			<b>Retention, Penetration and future Customer Satisfaction Ranking</b> <b>Program Entity Activity and Value by Branch, SE &amp; AE</b> <b>Define what to Measure/Report:</b> <ul style="list-style-type: none"> <li>• # Specific Client Action Plans per Qtr</li> <li>• # Client Visits w SE/AE, alone</li> </ul> <b>Legendary Service Nominations by Branch Quarterly</b> <b>Legendary Service Stories, Forwards, Efforts Quarterly</b>
<b>7. IPFS Process, Technology and CRM</b> <ul style="list-style-type: none"> <li>• STP</li> <li>• PBX</li> <li>• CRM</li> </ul>			<b>Implementation per Project Plan</b> <b>Full Training</b> <b>Usage</b>
<b>8. Talent Readiness (Human Capital Optimization – HCO)</b>			<b>Associate Turnover</b> <b>Promotions from within</b> <b>Performance Rating</b> <b>Future Expert Certification</b> <b># Leadership Hours per Qtr</b> <b>Team: Action Plans/Performance Review</b>
<b>9. Corporate Initiatives</b> <ul style="list-style-type: none"> <li>• BUG</li> <li>• Committees</li> <li>• Other</li> </ul>	<b>As determined by role on various committees</b>	<b>Shared with other committee members and peers</b>	<b>Individual Participation</b>



## ACTION DEVELOPMENT PLAN

**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 =
		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?**



## Themes

As we go through each of the tools together, use this as a place to capture themes that have stood out to you.

Tool	Insight from the Tool	Insight from the Feedback	Other Related Insights
<b>DISC</b>			
<b>360</b>			
<b>EQi</b>			
<b>Other</b>			

Of the above themes, what is most relevant to my success over the next 12 months?

What do I want to do about these insights?

## TRIAD MEETING PREP WORKSHEET - PARTICIPANT

**PARTICIPANT NAME:**

**COMPANY:**

1. What discussion topics do you want to make sure are covered during the triad meeting?

2. What message do you want to convey to your supervisor in this meeting?

3. Do you have any concerns about meeting with your supervisor in the triad meeting?

4. What do you think the critical issues or challenges will be in successfully implementing your ADP strategies?

5. How can your supervisor help or provide support as you continue to refine and implement your ADP?

5. Additional insights, comments or questions?





## TRIAD MEETING PREP WORKSHEET - SUPERVISOR

**PARTICIPANT NAME:**

**COMPANY:**

1. What stood out to you when you reviewed this participant's Action Development Plan (ADP) draft?

2. What do you think can be upgraded or adjusted?

3. What are 1 – 2 pieces of advice you have for this individual as they work to implement their ADP targets?

4. What discussion topics do you want to make sure are covered during the triad meeting?

5. Additional insights, comments or questions?