

Leadership Values Assessment

John Leader

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SECTION 1: STRENGTHS AND VALUES ALIGNMENT

Your Stated Strengths

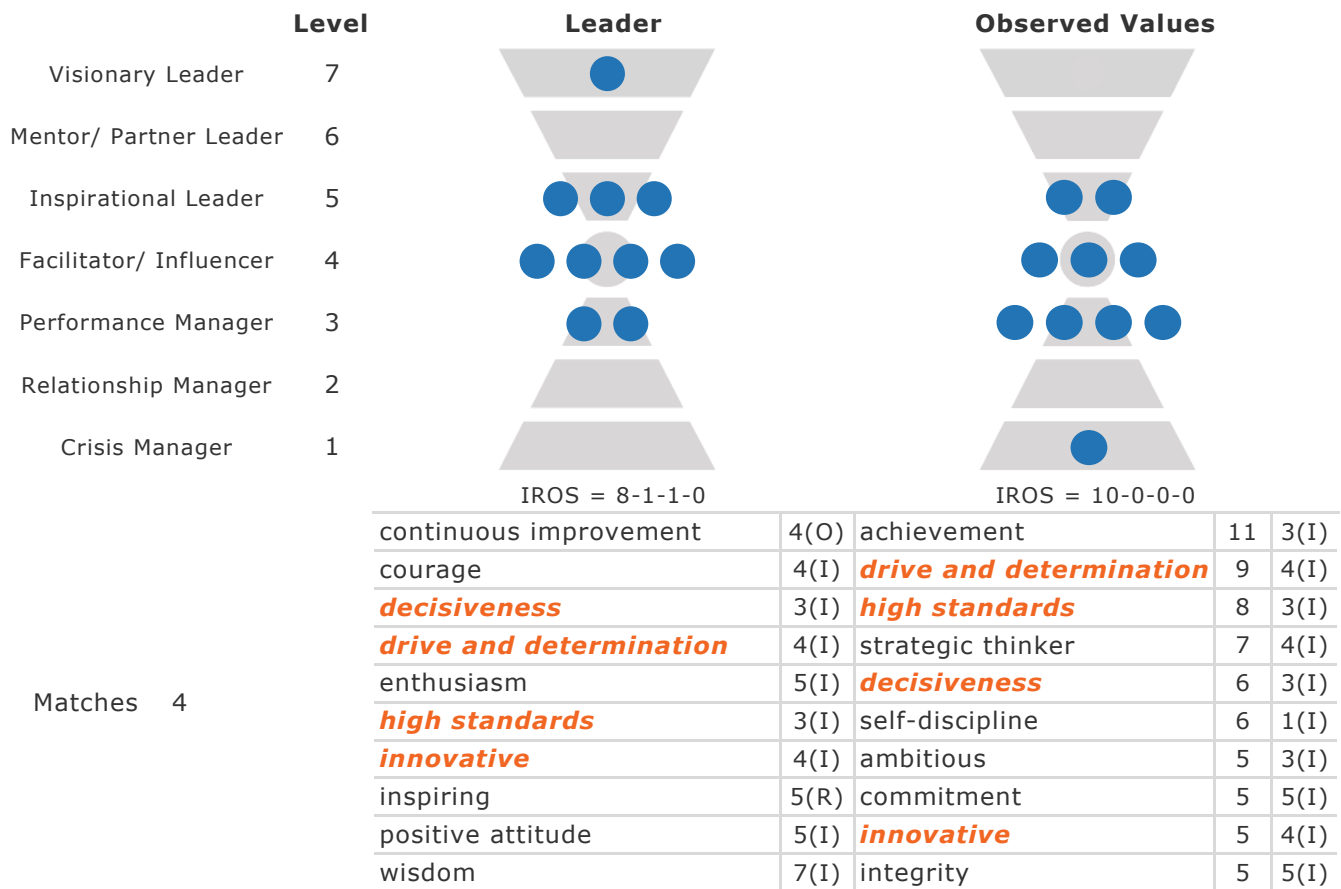
- High energy/capacity
- Ability to quickly synthesize complex problems and simplify them to the essential
- Social intelligence

Your Assessors' View of Your Strengths

- Continuous learning
- Integrity
- Drive
- Passion
- Commitment
- Honesty
- Warmth
- Communication skills
- High standards
- Innovation
- Strategic thinking
- Speed
- Results focus
- Courage

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Key Values Themes Observed by Assessors



- You are very focused and motivated, and ensure you act with principle
- You demonstrate resolve and dedication in your endeavors, and strive for quality outcomes
- You plan ahead tactically, encouraging new ideas and ways of working

Your assessors chose four of your values. This shows that a fair number of your values are coming across authentically:

drive and determination
high standards
decisiveness
innovative

Additionally, they selected six values / behaviors that you demonstrate, perhaps without awareness of their significance:

achievement
strategic thinker
self-discipline
ambitious
commitment
integrity

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Values Alignment

Your selected values show concentration at:

Level 4 - Facilitator/Influencer

Level 4 leaders empower their staff and encourage accountability. They focus on team building and innovation. They enjoy a challenge.

Your assessors have a different perspective and see most focus at:

Level 3 - Performance Manager

- focuses on excellence and manages performance
- builds systems that create order and efficiency
- thinks strategically and makes rational decisions
- wants to be successful

When the manager's needs for self-esteem are driven by subconscious fears, they often demonstrate a desire for power, authority, or status. They may:

- work long hours
- build bureaucracies and hierarchies to demonstrate their authority

Balance of Values

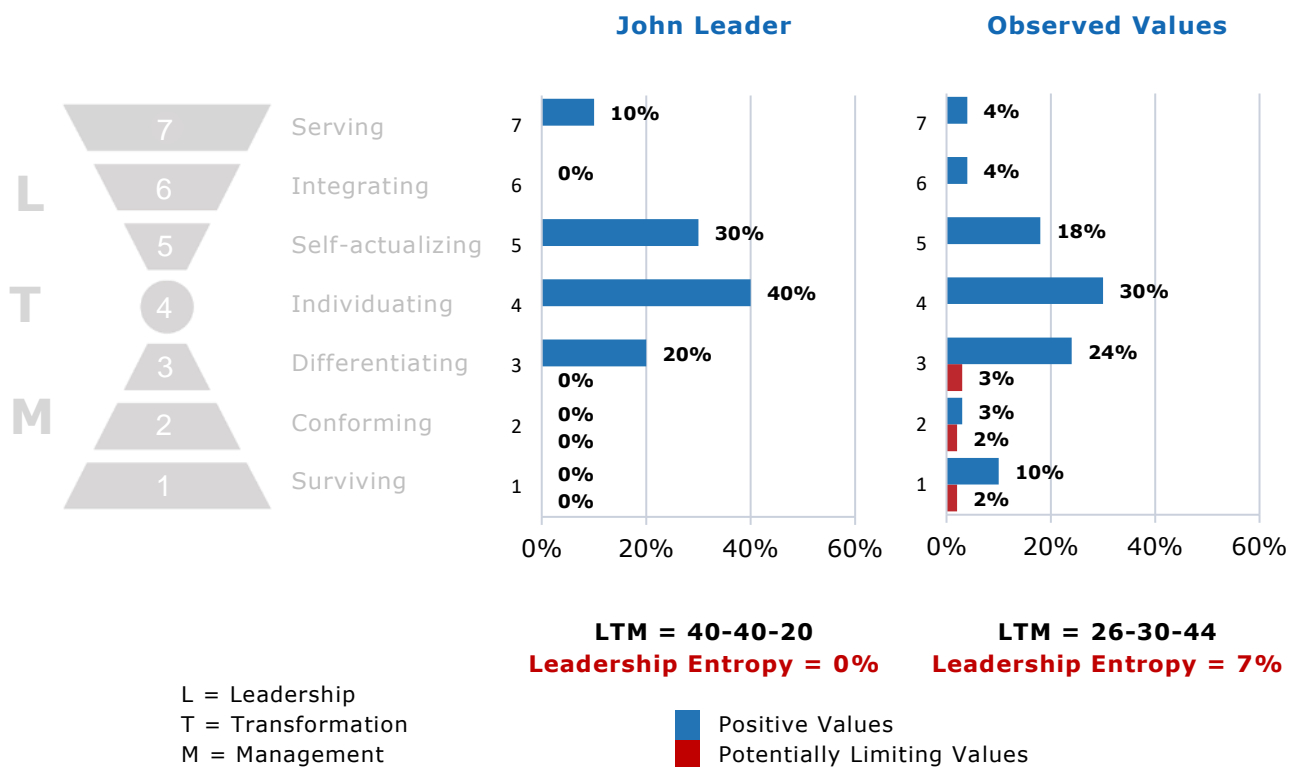
*IROS Index: Values can be classified as **I**ndividual, **R**elationship, **O**rganizational, or **S**ocietal type values and as either Positive (P) or Potentially Limiting (L).*

Your Selected Values	Assessors' Observed Values
IROS (P) = 8-1-1-0 IROS (L) = 0-0-0-0	IROS (P) = 10-0-0-0 IROS (L) = 0-0-0-0
<ul style="list-style-type: none">• You see most of your focus on your personal contributions and accountabilities.	<ul style="list-style-type: none">• Your assessors echo this perspective.

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Values Distribution Alignment

The distribution of observed values helps to indicate how others perceive your current stage of development. Look to the highest level at which your observers note significant concentration (both positive and potentially limiting), to determine where your development is currently focused.



The pattern of values selected by your assessors, indicates you are currently at the **Individuating** stage of development: Your primary motivations appear to be driven by a desire for ownership and independence.

The selection of observed values indicates that your concerns or fears may be preventing you from achieving your potential. To move to the **Self-Actualizing** stage of development, you should focus on creating internal cohesion and trust within the group, to enable the organization to fulfill its purpose.

It appears, from the values you have chosen, that you already see yourself operating in this way. However, currently this is not as strongly recognized by others.

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SECTION 2: DEVELOPMENT AREAS

Values Integration

The following values/ behaviors are not among the top values selected by your assessors. It appears these values are not coming across clearly to others (votes in parenthesis):

continuous improvement (4)
enthusiasm (4)
courage (3)
positive attitude (3)
wisdom (2)
inspiring (0)

Values Gaps

A gap may indicate an area in which you are highly competent, a blind spot or an area requiring attention.

You selected no positive values at:

Level 1 - Crisis Manager

Level 2 - Relationship Manager

Level 6 - Mentor/Partner Leader

Your assessors selected no positive values at:

Level 2 - Relationship Manager

Level 6 - Mentor/Partner Leader

Level 7 - Visionary Leader

Pay particular attention to any levels where you believe you show focus, which is not clearly recognized by your assessors.

Leadership Entropy

Leadership entropy is calculated by the percentage of votes from your assessors for potentially limiting values, which may stem from personal fears showing through in your behavior.

Level 1	Level 2	Level 3	
authoritarian (1) controlling (1) short-term focus (1)	internally competitive (2) conflict avoider (1)	demanding (2) long hours (1) power (1)	
2% of total votes	2% of total votes	3% of total votes	Total: 7%

Your degree of leadership entropy is relatively low (7%) and your leadership style largely supports your ability to reach your objectives.

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Your Defined Areas for Improvement

- Appreciate and positively acknowledge others
- Better at storytelling
- Be more direct

Your Assessors' Recommendations

- Focus on building deeper relationships. Move beyond a transactional interaction and truly seek to understand others, their challenges and their accomplishments.
- Provide greater transparency, holding yourself and the rest of the partners accountable to being more open with staff. Make time to help support their understanding around business motives and directives.
- While your speed is appreciated, there is also a call for you to be aware of when you need to slow down. Ensure you are bringing people on the journey with you and creating space for them to talk and be heard. Be open to other people's perspectives and points of view, and be willing to take them on board.

Your Stated Actions for Change

- Daily practice on all three

Take time now to review the list of strengths and the direct feedback provided by your assessors. It is clear that you have already built a foundation on which to grow. Consider each of your values and how they have helped you to get where you are now. Look to your values to support you on your path to the next level of development.

SECTION 3: FEEDBACK FROM YOUR ASSESSORS

- I am very excited to be working with you. I'm inspired both by your drive to learn new things and your courage to try them. You are highly intentional and of high integrity. They read like platitudes stated so simply, but I really mean them. As a leader at the company, I see you operating as a master practitioner. Given that, you're stretched thin and leading less internally than you could with your many talents and gifts. That may be the right tradeoff for your career and the business, but I'd invite you to think what it might look like to build a team and a system that allows you to scale yourself. Maybe you'll see something interesting. Either way, I'm excited to be collaborating more closely over time. (Will)
- I see these qualities already, so it's more about bringing them forward a bit more: 1) Inspiring / Celebrating. It's your polarity so not sure I need to say more here. 2) Mentoring. It would be really cool to see you and maybe a rotation of the partners sharing a monthly email to the team (though I could see it being great blog content too) on the areas where you may have 'failed' as a leader recently -- serving a few purposes 1) increased transparency into decision making that affect the team 2) demonstration of authenticity/vulnerability and greater connection to the partners 3) shared learning from the most palpable source (failure) 3) Transparency -- where appropriate. I know the partner team does their best on this front but it doesn't hurt to restate because we are all moving so fast we think that communication is widespread and then there are gaps in information. John, my experience of you from three years ago to today is markedly different. I really feel that you took the feedback from our team offsite and applied it to how you show up as a leader. It seems you've made a conscious choice to define your own path of what great leadership is and you are living it fully. It is a pleasure to witness you walk the talk. As we are just beginning to work more closely together professionally, I don't have much in terms of critical feedback to offer, though I'll encourage you to continue a practice of finding micro mentoring moments to share your thinking and how you got from point A to point B. And I will commit to speaking up and asking as many questions as I can to try and draw out that wisdom. (Kim)
- I've always been impressed with John's ability to be extremely thoughtful, analytical and effective in his decision making. He's able to quickly analyze a situation, identify all available courses of action, and productively push a process forward while holding a very fair and balanced perspective and without overthinking things. I so appreciate and admire your depth, your intelligence and your work ethic, John. In the beginning, I found you very intimidating, and you would not have been the first person I thought I'd connect with and find a mentor in. What became clear to me over the past 2 years is that I truly feel heard and seen by you, and that was something I didn't experience from other leaders at the company in the early days. It's had a huge impact on me and my growth. I deeply value our relationship and look forward to continuing to learn from you. (Christina)
- Really glad that he's part of the leadership team because he complements the other partners with his skills and capabilities. **STRENGTHS:** + Strategic thinking: John has an incredible gift for taking a holistic perspective, synthesizing and spotting the core issues + Integration of new ideas/ thinking: The voracious reader and learner that he is, John is able to take in new ideas and integrate them to raise the level of client work and impact + Energy & drive: There's no stopping John, and his passion always comes through. You know that he's committed to delivering the best for clients **IMPROVEMENTS:** + Build deeper relationships: I'd like to see John initiate relationship-building internally, to really understand the team + Bring people along: John moves

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really quickly and it sometimes feels like he'd rather "go-it-alone". If he believes in the strength of diverse team members, it'd be helpful to bring them into his thinking and create space for them to get aligned, and then able to contribute equally + Slow down, sometimes: While John moves quickly - and it's often a good thing! It sometimes feel like he and the team can benefit from slowing down, being more deliberate and reflective on next steps, for example, rather than shooting from the hip

- John - you have incredible strengths: huge capacity to be hard-driving and work hard, you confidently manifest results, and do so in such a way that you consistently walk the talk. Areas where you could improve: I wonder what you would be capable of if you had even broader range of emotional empathy and ability to connect. In the workplace, this could improve your ability to bring others along and mentor them. On a related note, for those who don't meet your standard, we wouldn't see you sink so quickly to such a deep place of judgment.
- Courage: John has guts. I've never seen him back down from a challenge. Responsibility: John's responsible mindset consistently comes through in his ways of operating; what he says and what he does. He raises the bar just by being in the room, and I don't know if he realizes that. Honesty: I trust John to be honest. This is linked to courage. I also appreciate those moments when John is honest about himself and what he's working on. It makes him more accessible and therefore safer and more lovable. Continue: Trusting yourself, your own intelligence and wisdom. I want your external resources to be clearly secondary to your own perspective, even as it relates to this values exercise. I encourage you to continue to look for answers inside yourself, paying a little less attention to external resources such as books, and I understand you are already on this path in writing your own book. I want to know what you believe and know, from your own experience. Joe Biden once described Obama as having "his heart as big as his head", and I want people to see that in you too, as I do. I believe I've shared this with you before. This metabolizing of what you learn and making it truly your own, discarding it, and/or adding to it your own lived experience, will give you a deeper authority, and by that I mean for you to become an "originator". I would say, start with your heart and your gut, and then move to your head. I've seen the changes in you, John. You have shifted from someone that used to inadvertently raise anxiety to someone that brings a great deal of safety and warmth to others. You have done this in a way that continues to keep the bar high. I'm so happy to see you using your strengths. (Kate)
- John, it's been GREAT starting to work together. This list of strengths could easily have continued toward a list of 7-10 major ones. And I had to somewhat reach for these two development opportunities (though I do think in your perpetual pursuit of "John V-next," these are opportunities). **STRENGTHS** 1. Extraordinary commitment to knowledge building for himself and as an incredibly high-impact guide and teacher for others in the company / at clients. 2. Presence and corresponding ability (especially when combined with #1 here) to be seen as a valued adviser by top-level execs. 3. Prolific capacity to create and successfully manage many simultaneous effort threads across clients, internal development and personal development. 4. Strong, clear communications skills -- verbally and in writing. 5. Highest level of integrity and commands/deserves implicit trust. **DEVELOPMENT OPPORTUNITIES** (let's discuss these if useful -- I'm just shooting from the hip here!). 1. At times (only at times -- perhaps when especially time-pressed?) John seems to let his own high level and fast pace of thoughts constrain space for others in a conversation or idea exchange. By being conscious of times where this leads to cutting off other people or somewhat quickly dismissing their ideas, he may be able to

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further improve his own ideas and their impact -- and give others the sense of a more-open environment where it's more "worth it" to offer thoughts. 2. Be conscious of how his intensity and drive (essential positive qualities) can affect the energy and mood of others. It may not always, for all people, draw them forward and get the best out of them. (Mark)

- Outstanding teacher, leader, and colleague.
- John's action orientation is a strength. He is able to move fast while producing high quality work and thus gets a lot done. John is a learner and is able to absorb a ton of information and quickly synthesize and then make it actionable/usable, which allows for innovation and collaboration to iterate on new IP, new ways of working with clients, etc. John delivers high quality work but knows how to focus on the things that matter. While details matter, he also doesn't sweat the small stuff, which creates room for the team to learn from mistakes and move on. He embodies the responsible mindset which creates a safe space for the team. John is great when he collaborates and he adds a ton of value internally when he does so, but he doesn't collaborate much in group settings. I see that sometimes he quickly loses patience and is triggered if meetings aren't run how he would like them or if people are staying on one subject too long. I know John is aware of this, but he can continue to find ways to collaborate and bring people in to his work, while still being efficient and moving quickly. Ultimately, I think it will create more value for John and the company overall. As a leader of the firm, John can continue to improve communications. He seems to like to keep things flexible/informal/not a big deal, and that leads to subtle messages that aren't always clearly communicated and can come across as noncommittal, which can create swirl/noise/confusion internally.
- Slow down.
- You have a strong impact on the culture of the firm. Be conscious of your presence and the non-verbal signals/expectations you set.
- John, you have extraordinary strengths. Here are 4 I wanted to call out: 1) Quickly digests big picture client situation (strategic & interpersonal) and generates quality, workable client solutions to respond to what he sees 2) Decisive and fast in providing direction to team on what he would like to see and how he would like them to engage (objectives, deliverables, messages for client, etc) 3) Very ready to provide quality, specific, actionable feedback after major interactions and when it occurs to him as material / important 4) John takes time to appreciate strong contributions and to pause for brief period aimed at building relationship. Those appreciations and moments are valued and valuable. John has much respect and social capital at the company and these intentional efforts go a long way. Your role is so pivotal at the company. The result is that your growth edges have disproportionate impact. And yet, you show a great willingness to continue to go to your growth edges and learn. I believe that by applying attention and energy in these 3 areas, you can become an even more effective leader. 1) John puts tremendous energy into building his knowledge base and has a lot of confidence about his judgment in how to respond to client situations. The good of this is that he has good judgment. The shadow side of this is that he tends to control a very significant share of decisions regarding the work - design, content, delivery, etc. In the event of a tie between John's view and differing views on the team, John goes with John's view 75%+. There is space to offer alternative views, but there is less space to shape the direction of the work with John than with other partners. When John doesn't have a point of view yet, recommendations are welcomed (especially if they fit the line of his thinking.)

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When John has a point of view, his willingness to move is limited - and occasionally his response to alternative views is one that shows non-verbal irritation. This can invite a dynamic of "guess what John is thinking." 2) John has a well-embodied value of "challenge" and he makes use of it to invite the team to stretch ourselves and to be our best. It's a great strength. The shadow side of the strength is that there is an underlying feeling that in the pursuit of maintaining a very high bar, John ends up relating to people as means. My sense is that John respects me and cares about me to a certain sincere extent, and yet I can also feel a certain arm's length aspect to my relationship with John. I have an intuition that the relationships (especially with junior and mid-level staff) may be somewhat disposable if they cease to fit his ideal person in the ideal role. 3) John shares high quality feedback often. And yet, I am recently discovering that there is also material feedback (or context) that will often be missing that interferes with the feedback landing with an appropriate sense of (this is most important, this is what this level of performance means in terms of what I am looking for from you, etc.) If John improved at providing a more complete context of priority and consequence around his feedback, I suspect he could get even more mileage from his team in terms of performance and development over time.

- John is a highly respected role model for all of us at the company. His focus on continuous improvement and the growth of the firm is incredibly valuable.

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SUMMARY

Observed Qualities- Top Values

- You are very focused and motivated, and ensure you act with principle
- You demonstrate resolve and dedication in your endeavors, and strive for quality outcomes
- You plan ahead tactically, encouraging new ideas and ways of working

Predominant Leadership Style Demonstrated

Level 3 - Performance Manager

Level 3 leaders are managers of performance. They build systems and processes to create order and efficiency. They embrace excellence and strive to be the best at what they do.

Note that there appear to be issues that are undermining your effectiveness here.

Self-Awareness

Values matches with your assessors: 4

You have a good degree of self-awareness but there are a number of values which your assessors do not clearly recognize in you.

<<RBA values types differences>>

Leadership Entropy

Your level of leadership entropy is relatively low (7%) and your leadership style largely supports your ability to reach your objectives. However, you may wish to explore some of your behaviors that could be impacting on your ability to achieve your full leadership potential.

Suggested Development Areas

- **Focus on building deeper relationships.** Move beyond a transactional interaction and truly seek to understand others, their challenges and their accomplishments.
- Provide greater transparency, holding yourself and the rest of the partners accountable to being more open with staff. Make time to help support their understanding around business motives and directives.
- While your speed is appreciated, there is also a call for you to be aware of when you need to slow down. Ensure you are bringing people on the journey with you and creating space for them to talk and be heard. Be open to other people's perspectives and points of view, and be willing to take them on board.

Suggested Next Steps and Areas for Reflection

John, it is clear that you are a highly regarded leader and are well thought of by your assessors. However, it appears that there are some underlying issues centered around how you connect with others that are impeding your effectiveness and ability to reach your full potential. There is

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a clear call for you to take to build relationships; people want to feel a stronger connection to you and would like you to get to know them. Your ability to operate at such a rapid pace has clearly served you well, however, it is also important to think about how it may be hindering you. Your assessors are asking you to make sure that you are able to bring people on the journey with you and have an awareness of the pressures they may be experiencing. What may be holding you back from doing this already?

Your assessors are also asking you to truly listen to them. They want you to create space for them to talk and ask that you be open to different ideas and perspectives, ensuring that others feel heard. Almost all of your assessors noted your strength in building knowledge and you yourself value your “wisdom”. To what extent may your drive for more theoretical knowledge be preventing you from being open to the insights you can also gain from those around you?

Recommendations

- Take some time for self-appreciation. You have shown courage in stating what is important to you and in inviting people to help you examine how you come across as a leader.
- Reflect on what people have asked you to improve, and look to the strengths both you and they have noted, to determine what you can use to develop and deepen your journey as a leader.
- Determine your action plan.
- Find a way to acknowledge the people who have taken the time to help you with this journey.
- Share this report with someone significant in your life who supports you and can help you foster some of these changes.

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SEVEN LEVELS OF LEADERSHIP CONSCIOUSNESS



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DISTRIBUTION OF CONSCIOUSNESS

There are seven well-defined levels of leadership that correspond to the Seven Levels of Organizational Consciousness. Leaders who learn to master the needs of every level of Organizational consciousness operate from Full Spectrum Consciousness and are the most resilient and successful leaders. These levels also correspond with stages of psychological development that individuals go through as they move from satisfying their basic needs to focusing more on growth needs.

The principal focus of the lower levels of leadership consciousness is on creating a financially stable Organization with a strong customer base that has efficient systems and processes. The principal focus of the transformation level of leadership consciousness is to promote a climate of continuous learning and employee empowerment so that the Organization can be responsive and adaptable to changes in its internal and external environment. The principal focus of the upper levels of leadership consciousness is to create a vision, mission and values for the Organization that builds internal and external connectivity through strategic alliances and makes a contribution to society. Personally, the leader is finding a sense of purpose and aligning with others in support of a greater good.

The Seven Levels of Leadership Consciousness are described below in detail.

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LEVEL 1: THE CRISIS MANAGER

Leaders at Level 1 understand the importance of financial stability and/or shareholder returns, and look after the health and safety of employees. One of the most important attributes of these leaders is the ability to handle crises. They are calm and decisive in the midst of chaos and danger.

The potentially limiting aspects of this level are generated from fears about not having enough control or stability. When these fears predominate leaders quickly lose the trust and commitment of their people. The greater their fears, the more demanding and risk-averse these leaders become.

LEVEL 2: THE RELATIONSHIP MANAGER

Relationship managers handle conflicts easily and invest time in building harmonious working relationships, both internally and externally. They use their relationship skills to handle difficult interpersonal issues, and their communication skills to build loyalty with their employees and customers.

The potentially limiting aspects of this level stem from fears about not being liked, and/or not being able to deal with their own or others' emotions. Consequently, they avoid conflicts, resort to manipulation to get what they want and protect themselves by blaming others when things go wrong.

LEVEL 3: THE PERFORMANCE MANAGER

Performance managers focus on excellence and use metrics to manage results. They build systems and processes that create order, efficiency, and enhance productivity. They are logical and rational decision-makers. They want to be successful and they want to be the best.

When Performance managers' needs for self-esteem are driven by subconscious fears, they become hungry for power, authority, and/or recognition. They build bureaucracies and hierarchies to demonstrate their authority. Their need for self-esteem can lead them to work long hours. Image and status may be important to them and they could find themselves playing office politics to get what they want.

Note: there are no potentially limiting values in levels 4 to 7.

LEVEL 4: THE FACILITATOR/INFLUENCER

Facilitators seek advice, build consensus and empower their staff. They support the research and development of new ideas and embrace continuous learning. They become enablers of others, encouraging them to express themselves, share their ideas and be accountable for their actions. They encourage innovation and focus on team building. They enjoy challenges and are courageous in their approach. Facilitators are in the process of shifting from becoming a manager to becoming a leader.

LEVEL 5: THE INSPIRATIONAL LEADER

The Inspirational leader promotes a shared vision for the Organization that inspires employees. They support a shared set of values and demonstrate congruent behaviors that guide their decision-making. By creating an environment of openness, transparency and fairness, they build trust and commitment. The culture they create brings out the best in people by unleashing enthusiasm, passion and creativity. They are honest and display integrity in their endeavors.

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LEVEL 6: MENTOR/PARTNER LEADER

Mentor/Partners are motivated by the need to make a difference in the world. They are true servant-leaders. They care about their people, seeking ways to help employees find fulfilment through their work, and are active in building a pool of talent for the Organization by mentoring and coaching their subordinates. They collaborate with customers and suppliers to create win-win situations. They may be active in the local community, building relationships that create goodwill and recognize the importance of environmental stewardship.

LEVEL 7: VISIONARY LEADER

Visionary leaders are motivated by the need to serve. They have a long-term perspective. They are concerned about the state of the world and about the legacy they are leaving for future generations. They are committed to social responsibility. They act with humility and compassion. They are generous in spirit and forgiving by nature. They are at ease with uncertainty and can tolerate ambiguity. They enjoy solitude and are reflective. Level 7 leaders are admired for their wisdom and vision.

STAGES OF DEVELOPMENT

The following table provides an overview of the seven stages of psychological developmentⁱ.

Stages of Development	Overview of task	Needs	Stages of Evolution
Serving	Fulfilling your destiny by caring for the well-being of humanity or the planet.	Leading a life of significance by being of service.	External Cohesion <i>(Cooperating with others in alliances, for the common good)</i>
Integrating	Aligning with others who share the same values and purpose, to create a better world.	Making a difference by actualizing your purpose.	
Self-actualizing	Becoming more fully aware of who you are by leading a values- and purpose-driven life.	Finding meaning through activities or work you are passionate about.	Internal Cohesion <i>(Aligning with your true, authentic self)</i>
Individuating	Letting go of the aspects of your parental and cultural conditioning that no longer serve you	Gaining freedom and autonomy by becoming accountable for your life.	
Differentiating	Distinguishing yourself from the crowd by honing your skills and talents.	Receiving acknowledgement for your achievements.	Personal Mastery <i>(Becoming viable and independent)</i>
Conforming	Keeping safe and secure by staying loyal to your family, kin and culture.	Experiencing love, respect and belonging at home and work.	
Surviving	Staying alive and healthy in the best conditions possible.	Fulfilling your physiological and nutritional needs.	

ⁱ: Richard Barrett , Evolutionary Coaching- Stages of Psychological Development