

Leadership Team Values Assessment (LTVA)

Example



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To build a high performing, values-driven team that engenders high levels of engagement requires leadership commitment and an ongoing process of values management that becomes deeply engrained into the ethos of the team. The starting point is to find out what is and what is not working.

This Leadership Team Values Assessment provides you with an overview of what drives your leaders, how they see the leadership team operating now and provides you with a roadmap for change. Key performance indicators, such as values alignment and the Cultural Entropy score, can help you measure the success of change initiatives as you monitor progress and needs year by year.

Additional recommended reading:

- [The New Leadership Paradigm](#)
- [The Values Driven Organization](#)
- [The Metrics of Human Consciousness](#)

EXECUTIVE SUMMARY AND RECOMMENDATIONS

The following pages provide a quick, high level synopsis of the findings contained later in this report.

Who are the members of this leadership team?

Reference top Leadership Values.

- Decisions based on experience, strong principles, and high standards
- Focus on fostering a sense of ownership and mutual confidence
- Emphasis on creating a plan of action, with an ongoing willingness to refine business practices and explore fresh approaches
- Efforts to work closely with others, ensuring clear understanding and an open flow of information

What is their current experience of the leadership team?

See top Current Culture Values.

- Strong drive to meet objectives, expand the business, and excel in the market
- Efforts to uphold the highest of standards and maintain a can-do spirit
- Dedicated people who believe in taking ownership of their actions, yet fail to work cooperatively at times
- Limited budgets and a lack of planning for the future

What do they see as important for the future of the leadership team?

See top Desired Culture Values.

- People working closely together, with mutual confidence and a common understanding of the way forward
- A resilient approach, with willingness to explore new ways of thinking and implement bold initiatives
- Consideration for the future and development of an enduring business model
- Increased emphasis on encouraging a sense of ownership, with new focus on principle-based decisions
- Ongoing attention to upholding high standards and maintaining an upbeat spirit

Additional insights

1. Note that this leadership team would like to shift their focus beyond the performance emphasis of Level 3 and incorporate more of the transformative and common good perspective of Levels 4, 5, 6, and 7. The newly requested values of 'long-term perspective', 'shared vision', 'focus on sustainability', 'adaptability', and 'courage' suggest the need to consider how the team can lead with resilience in changing times.
2. The leaders in this group see themselves as able to incorporate the values of 'collaborative working', 'open to new ideas', 'trust', and 'integrity' into their individual leadership style, and they would like opportunities to make use of these strengths when they come together as a leadership team. What steps are needed to ensure these values play a prominent role in the way the group functions going forward?
3. Issues around being 'internally competitive' may be preventing this group from functioning as a cohesive team. How can the team come together and create 'trust' in one another as they request? How would they like to see 'trust' and 'collaborative working' manifest, and what are the priorities here? What role does 'shared vision' play in promoting cohesion?

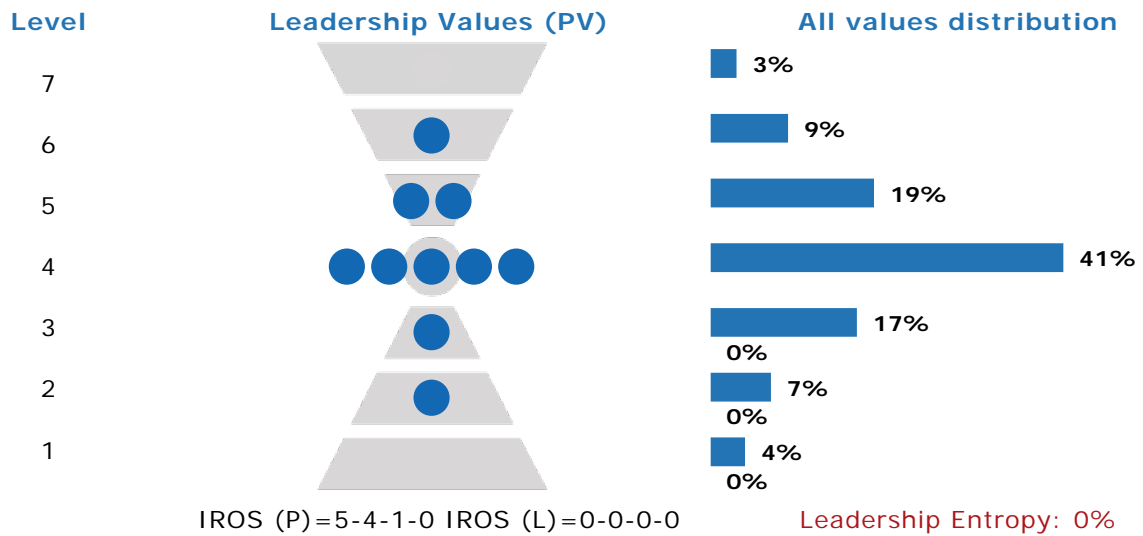
Suggestions for implementing change

1. Develop a plan to communication and explore these results. Remember to celebrate strengths, as well as looking at what can be improved.
2. Foster group dialogue to gain greater understanding around specific areas or issues and planning steps for improvement. An overview of steps you might take can be found in [Get Connected](#) pages 52-54 or in the following exercise: [From CVA to Action](#)
3. Determine what type of leadership team culture is needed to align with the business strategy. [Align Strategy & Culture](#)

4. Following these communication exercises, identify which are the key outcomes or processes that the group wants to achieve or improve. Here are some examples of possible next steps:
 - a) How might this group build 'trust' with one another? [Tools to build trust](#)
 - b) What steps can you take to honour the call for more focus on relationships across the group?
 - c) To what degree is the gap in the BNS area of Evolution and Societal Contribution reflective of missing need in the group? There is an underlying call for more focus here. Find out from participants what they believe the key priority to be.
 - d) People are asking to create a 'shared vision'. Consider how you might start to build understanding across the group. [Future Dialogue](#)
5. There is clearly a call for change. Consider if you undergo a transformation project, how you might help everyone understand the change journey and support them on it. Download the free book, [The Dynamics of Change](#), to give you an overview of things to consider. The following exercises may also be helpful: [The Change Curve Important Questions Force Field Analysis](#)
6. What help might the leaders of the organisation need to understand and address both the tangible and intangible aspects of any changes planned? [Balanced Action Plan](#)

SECTION 1: LEADERSHIP VALUES

Understanding the members of your leadership team



P: ● - Positive Value
 L: ○ - Potentially Limiting Value

I- Individual
 R- Relationship
 S- Societal

integrity	6	5(I)
accountability	5	4(R)
strategic thinker	5	4(I)
business/ industry knowledge	4	4(I)
open to new ideas	4	4(I)
collaborative working	3	6(R)
communication skills	3	2(R)
continuous improvement	3	4(O)
excellence	3	3(I)
trust	3	5(R)

What is important to these leaders? - *Derived from top Leadership Values.*

- Decisions based on experience, strong principles, and high standards
- Focus on fostering a sense of ownership and mutual confidence
- Emphasis on creating a plan of action, with an ongoing willingness to refine business practices and explore fresh approaches
- Efforts to work closely with others, ensuring clear understanding and an open flow of information

What drives them? – See concentration of top values and full values distribution by level.

Level 4 – Facilitator/Influencer

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

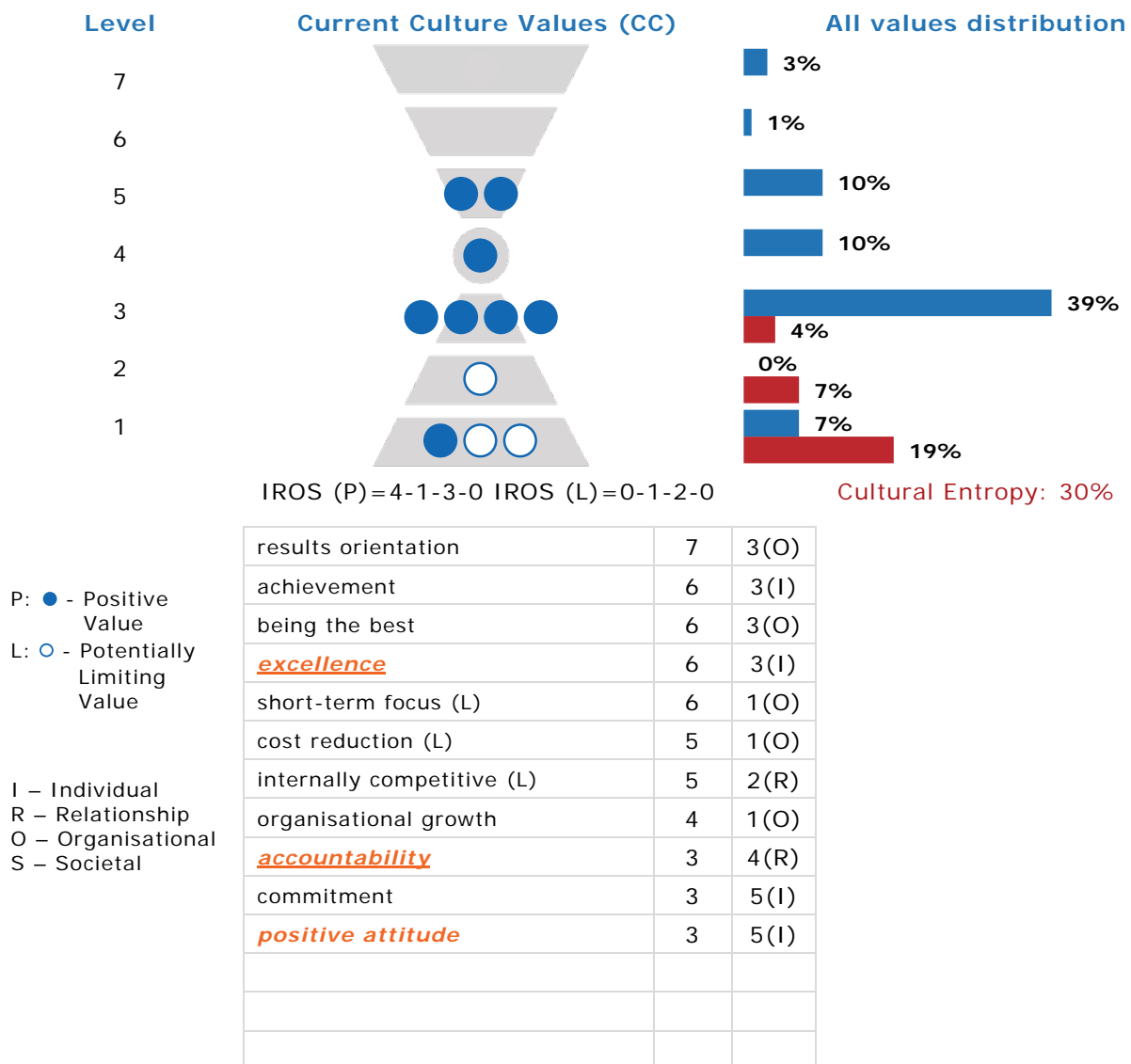
What is their main focus? – Refers to top values types favouring Individual, Relationship, Organisational or Societal Values (IROS).

The type of values selected shows most focus on their personal abilities. However, this group also clearly appreciates their connections with others.

How might knowing your leaders better help the group to further utilise their strengths?

SECTION 2: CURRENT CULTURE VALUES

An overview of participants' current experience of the leadership team



How is the leadership team seen to operate? – Refer to top Current Culture values.

- Strong drive to meet objectives, expand the business, and excel in the market
- Efforts to uphold the highest of standards and maintain a can-do spirit
- Dedicated people who believe in taking ownership of their actions, yet fail to work cooperatively at times
- Limited budgets and a lack of planning for the future

What areas receive most focus in the leadership team? - See concentration of top values and full values distribution by level.

Level 1 - Survival shows a focus on business and employee health.

Level 3 - Self-esteem is concerned with performance, systems and processes.

Note that some of this focus is potentially limiting, particularly at Level 1, and may be adversely affecting the team.

How do you see this focus expressed in the behaviours, strategy and structure of your leadership team?

How well does the focus of the team align with the strengths of the leadership team members?

Which types of values receive most attention? - Consider the balance between people-focus (IRS) and business-focus (O – Organisational values).

The range of top values selected shows most emphasis is placed on business needs, though from both a positive and potentially limiting perspective.

Is enough attention placed on each area? Is one area more heavily represented than others? If so, why?

What areas receive little apparent focus? – Levels without top positive Current Culture values are either unconsciously taken care of, a blind spot, or a next area of growth.

There are no top positive values in the following levels:

Level 2 - Relationship focuses on interpersonal working connections - internally, externally or both.

Level 6 - Making a Difference promotes positive changes through internal connectedness and external alliances.

Level 7 - Service focuses on long-term sustainability through care for the world and its people.

What concerns, if any, do these gaps raise for you?

What do you feel is the next area of growth for your team?

What potential issues impact the team? – Look at the top potentially limiting values represented by a white dot.

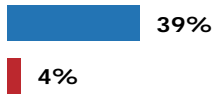

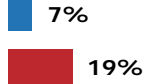
Consider the causes and corrective actions behind these values:

Short-term focus is potentially limiting when people expend available energy on short-term issues at the expense of long-term solutions. It can be reflective of a reactive mind-set or scarcity consciousness.

Cost reduction can be potentially limiting when actions to cut costs lead people to perceive that they lack access to necessary resources or when quality is compromised. Cost reduction can be positive when combined with efforts to improve returns or systems for the benefit of all stakeholders.

Internally competitive actions become potentially limiting when they prevent open communication and the sharing of information, resources or ideas. The focus may be on self-interest rather than the common good.

Where is the dysfunction within the leadership team? - *The Cultural Entropy score equates to the percentage of votes for potentially limiting values, which can stem from internal or external factors, or from the fear-based actions and behaviours of leaders, managers and supervisors. A Cultural Entropy score of 10% or lower is healthy. Note, report diagrams may show a variance in score due to rounding to the nearest whole number.*

LEVEL	Potentially Limiting Values (votes)	Cultural Entropy %
3 	confusion (1) hierarchy (1) long hours (1)	4% of total votes
2 	internally competitive (5)	7% of total votes
1 	short-term focus (6) cost reduction (5) caution (2)	19% of total votes

A Cultural Entropy score of 30% reflects significant issues requiring cultural and structural transformation, as well as leadership coaching.

Discuss with participants the degree to which these potentially limiting values impede their work. Determine where to focus attention for improvements.

The Cultural Entropy percentage is most concentrated at Level 1 - Survival, indicating concerns affecting business health.

Note where negative focus is undermining positive efforts.

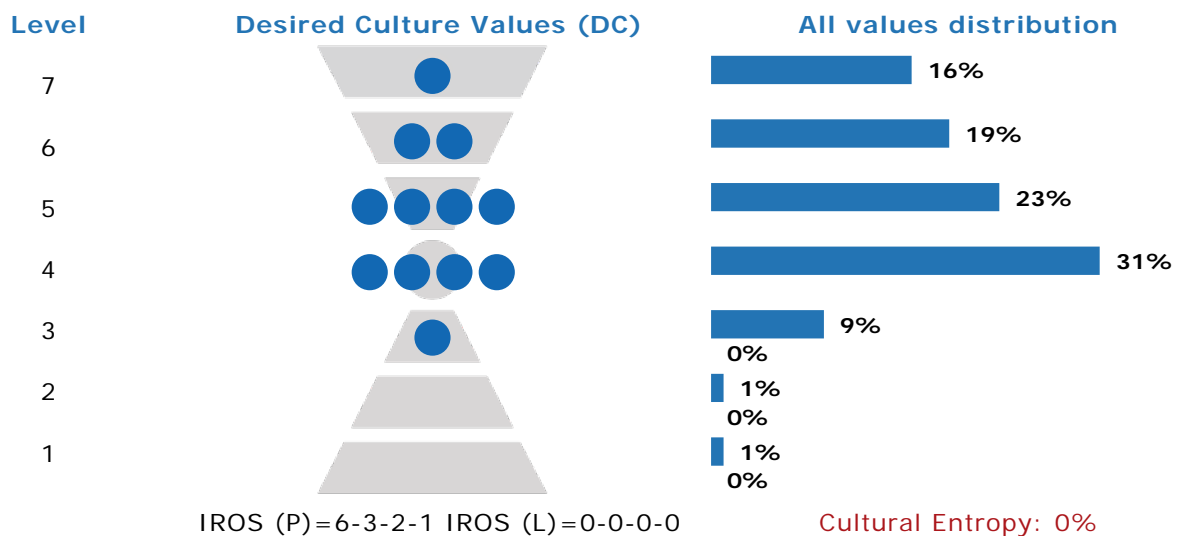
What are the key concerns for your leadership team? – *See potentially limiting values in table above.*

- Leaders may feel as if they are working against one another at times
- Emphasis is placed on meeting immediate needs, with little budget or planning for the future

How do these situations show up in the leadership team? What behaviours do people experience and how does this impact them?

SECTION 3: DESIRED CULTURE VALUES

An overview of participants' desires for the future of the organisation



P: ● - Positive Value
 L: ○ - Potentially Limiting Value

I – Individual
 R – Relationship
 O – Organisational
 S – Societal

accountability	7	4(R)
collaborative working	6	6(R)
long-term perspective	6	7(O)
shared vision	6	5(O)
excellence	5	3(I)
focus on sustainability	5	6(S)
open to new ideas	4	4(I)
trust	4	5(R)
adaptability	3	4(I)
courage	3	4(I)
integrity	3	5(I)
positive attitude	3	5(I)

What is seen as essential to reach the leadership team's highest potential? – Refer to top Desired Culture values.

- People working closely together, with mutual confidence and a common understanding of the way forward
- A resilient approach, with willingness to explore new ways of thinking and implement bold initiatives
- Consideration for the future and development of an enduring business model
- Increased emphasis on encouraging a sense of ownership, with new focus on principle-based decisions
- Ongoing attention to upholding high standards and maintaining an upbeat spirit

Where do team members want to see most focus in future? - See concentration of top values and full values distribution by level.

The top values and full values distribution show a desire for most attention to:

Level 4 - Transformation representing an openness to change and input from employees.

Level 5 - Internal Cohesion reflecting the strength of community spirit inside a group.

What types of values do they want to promote moving forward? – Note shifts in focus from top Current to Desired Culture values.

There is a call for the leadership team to increase positive focus on individual qualities, the way in which people interact with one another and on serving the common good.

What new behaviours and actions will support the success and development of your leadership team?

What additional requests are emerging? – *The following values received the greatest increase in votes from Current to Desired Culture. More people want to experience these values in the culture; these values jumps show where the leadership team can build engagement, as well as provide more insight into the themes emerging from the Desired Culture.*

Value	Level (IROS)	Current Culture Votes	Desired Culture Votes	Jump
collaborative working	6 (R)	0	6	6
long-term perspective	7 (O)	0	6	6
shared vision	5 (O)	0	6	6
focus on sustainability	6 (S)	0	5	5
accountability	4 (R)	3	7	4
open to new ideas	4 (I)	0	4	4
trust	5 (R)	0	4	4
adaptability	4 (I)	0	3	3
courage	4 (I)	0	3	3
integrity	5 (I)	1	3	2
wisdom	7 (I)	0	2	2

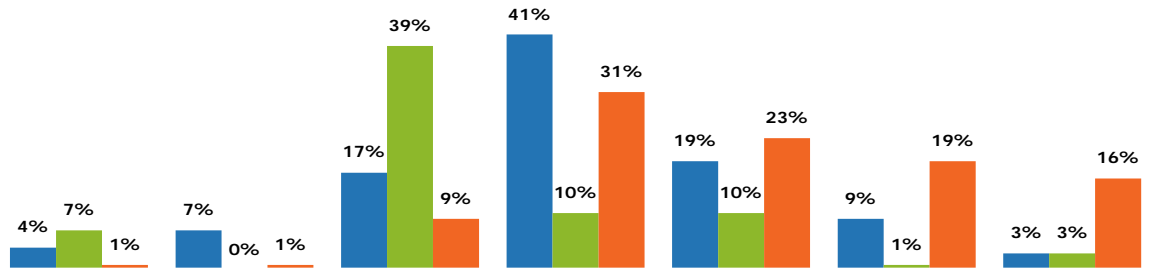
Values in bold are top values in the Desired Culture.

Those values, which are not top desired values, show underlying shifts in focus that may be worthy of additional attention:

- Participants would like to see the groups' acquired experience, knowledge, and insights being capitalised on in this leadership team.

What areas appear to require most focus, and how might you incorporate some of these values in your efforts to promote cultural change?

Which areas are of rising importance? – The distribution of all positive values by level clearly shows which levels are of rising importance (see increase from green/Current to orange/Desired). The table includes the main values associated with the rising requests from the top desired values and values jumps. Leadership Team values shows where talents and skills inherent in your team may support your efforts.



Level	1	2	3	4	5	6	7
Desired Culture Values				accountability open to new ideas adaptability courage	shared vision trust integrity positive attitude	collaborative working focus on sustainability	long-term perspective
Values Jumps							wisdom
Leadership Values		communication skills		accountability strategic thinker business/industry knowledge open to new ideas continuous improvement	integrity trust	collaborative working	

Leadership Values ■ Current Culture Values ■ Desired Culture Values ■

The largest shifts in focus are requested at Level 4 – Transformation and Level 6 – Making a Difference, revealing a call to focus on continuous renewal and efforts which serve the greater good.

What do you see as the call for action from the group, and how might the values included in this table help address these challenges?

SECTION 4: OTHER INDICES

Additional perspectives on the data to reveal other areas of significance

Values Matches - See repeating top values, which indicate cultural alignment.

Leadership/Current Culture Matches: 2

Indicates some connection between what is important to the people and their experience at work. In a highly aligned culture, one would expect to see three or four matching values.

Current/Desired Culture Matches: 3

Shows some confidence in the current direction of your team, yet with a call for change to strengthen performance and enhance commitment.

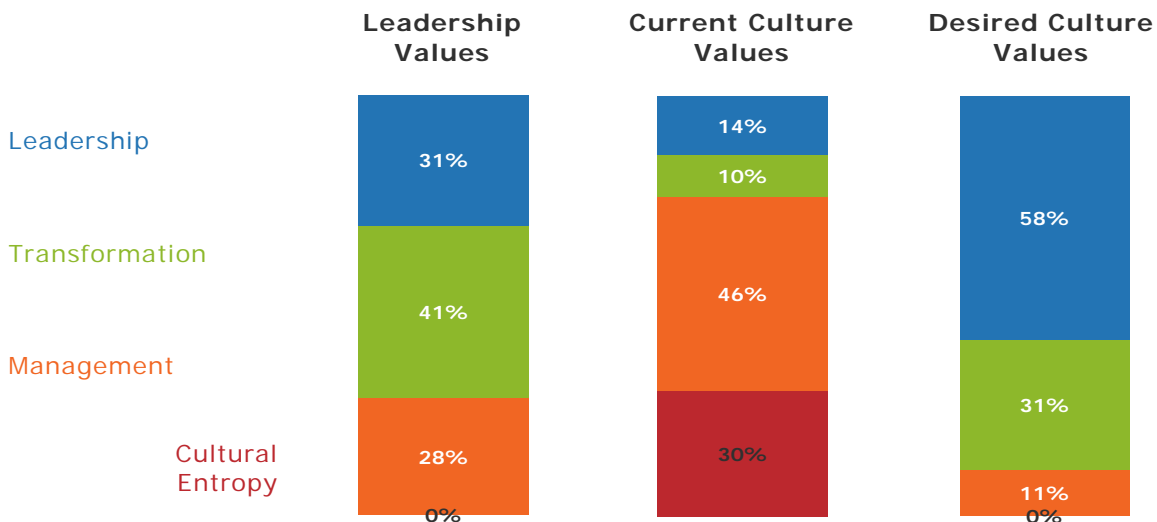
Underutilised Leadership Values requested in Desired Culture: 4

Not only are these values important to the individual leaders, but participants also believe they can improve the team’s performance. These new requests are:

- integrity**
- open to new ideas**
- collaborative working**
- trust**

How confident are people that the group is on the right track? What areas appear relevant to focus upon next?

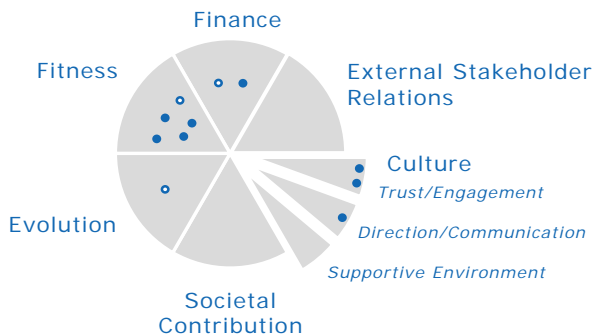
LTM Values Distribution – Here, votes for all values are grouped according to three major drivers: Management, composed of Levels 1, 2 and 3, Transformation at Level 4 concerning adaptability and employee participation, and Leadership, made up of Levels 5, 6 and 7.



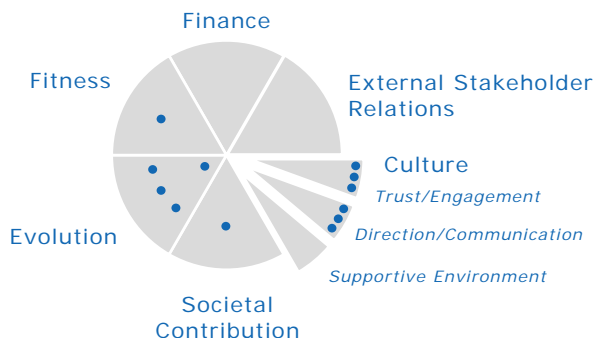
Severe misalignment between Current and Desired values distribution suggests that people here believe that their team is moving in the wrong direction. Participants would like to see more emphasis on Transformation and serving the Common Good.

Business Needs Scorecard (BNS) – The top Current and Desired values are displayed according to six key business indicators that can help guide strategy for ongoing success.

Current Culture Values



Desired Culture Values



	Current Culture	Desired Culture	
Finance	cost reduction (L) organisational growth		
Fitness	results orientation achievement being the best excellence internally competitive (L)	excellence	
External Stakeholder Relations			
Evolution	short-term focus (L)	long-term perspective open to new ideas adaptability courage	
Culture	Trust/Engagement	accountability commitment	accountability collaborative working trust
	Direction/Communication	positive attitude	shared vision integrity positive attitude
	Supportive Environment		
Societal Contribution		focus on sustainability	

Current Culture:

Dysfunction is impacting the team’s ability to deliver and progress, which ultimately affects the bottom line.

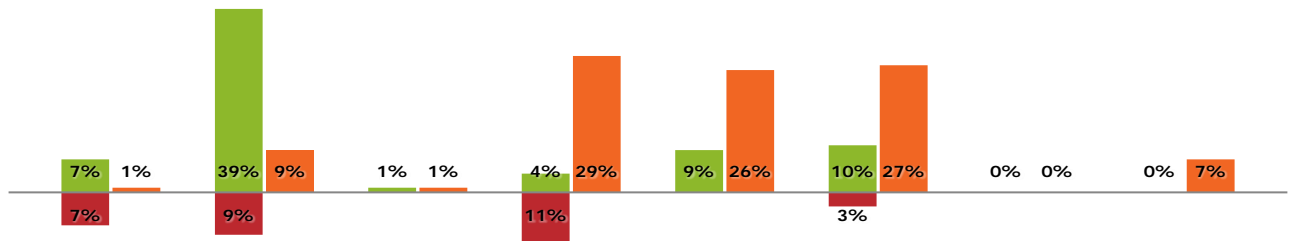
Desired Culture:

Participants seek a more progressive, enduring approach and a more cohesive team culture.

Note the gap in the area of External Stakeholder Relations for both Current and Desired top values.

Is this gap unconsciously addressed, a blind spot, or a next area for development? What areas may require focus to promote the group's overall business success?

BNS Values Distribution – Viewing all the Organisational values according to their BNS category reveals where people see a need for greater strategic focus (note increase from green/Current to orange/Desired). The table shows the top values and jumps associated with the increased focus. Potentially limiting values reveal what is causing dysfunction in each area.



	Finance	Fitness	External Stakeholder Relations	Evolution	Trust/Engagement	Direction/Communication	Supportive Environment	Societal Contribution
Desired Values				long-term perspective open to new ideas adaptability courage	accountability collaborative working trust	shared vision integrity positive attitude		focus on sustainability
Values Jumps						wisdom		
Potentially Limiting Values	cost reduction	internally competitive long hours		short-term focus caution		confusion hierarchy		

Positive Values - Current Culture ■ Cultural Entropy: Current Culture ■ Positive Values - Desired Culture ■

The biggest shift among positive values is requested in Evolution, which denotes a request to increase focus on the development of people, processes, products/ services, and ways of thinking. Look at the Desired Values and Values Jumps to see how people would like to support such initiatives, and review Potentially Limiting Values here for issues that may be hindering progress.

Review the areas where there is the largest concentration of Cultural Entropy to see what may be undermining the team's ability to utilise its full potential. Look at where change is requested and review the strategic plans of the business. How are these categories covered by existing activities, and what requires more focus? Consider which values in the table will help you address any concerns.

SEVEN LEVELS OF LEADERSHIP CONSCIOUSNESS

Levels of Consciousness

Motivation/ Fears



Distribution of Consciousness

There are seven well-defined levels of leadership that correspond to the Seven Levels of Organisational Consciousness. Leaders who learn to master the needs of every level of organisational 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 organisation 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 organisation 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 organisation 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.

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 organisation that inspires employees. They support a shared set of values and demonstrate congruent behaviours 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 endeavours.

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 organisation 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 recognise 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.

SEVEN LEVELS OF ORGANISATIONAL CONSCIOUSNESS

Levels of Consciousness

Positive Focus/ Excessive Focus



Distribution of Consciousness

Many organisations tend to be focused in the first three levels of consciousness – Level 1: profit and growth, Level 2: customer satisfaction and employee recognition, and Level 3: productivity, efficiency and quality. The most successful organisations live values and behaviours that are distributed across all seven of the levels, showing Full Spectrum Consciousness.

Level 1: Survival

Level 1 focuses on growth and survival. It includes values such as profit, organisational growth, employee health and safety, and shareholder value.

The potentially limiting aspects of this level are generated from fears about not having enough and not being in control. This leads to micromanagement, territorial behaviour, excessive caution and exploitation.

Level 2: Relationship

Level 2 focuses on the quality of interpersonal relationships between employees, and between employees and customers. It includes values such as open communication, conflict resolution, customer satisfaction, loyalty, and respect.

The potentially limiting aspects of this level are generated through fears around not belonging and not being acknowledged. This leads to rivalry, internal competition, manipulation, and conformity.

Level 3: Self-Esteem

Level 3 focuses on pride in performance, best business practices and effectiveness. Examples of values at this level include productivity, excellence, efficiency, professional growth, skill development, and quality.

The potentially limiting aspects of this level are generated through fears about not being enough, and low self-worth. This leads to arrogance, complacency, bureaucracy, and power seeking.

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

Level 4: Transformation

Level 4 focuses on adaptability and continuous renewal. It includes values such as accountability, employee participation, learning, innovation, teamwork, diversity, personal development, and knowledge sharing.

Level 5: Internal Cohesion

Level 5 focuses on building a sense of internal cohesion in the organisation. It includes values such as trust, integrity, honesty, value awareness, shared vision, cooperation, fairness and generosity. The by-products of this sense of cohesion are enjoyment, enthusiasm, passion, commitment, and creativity.

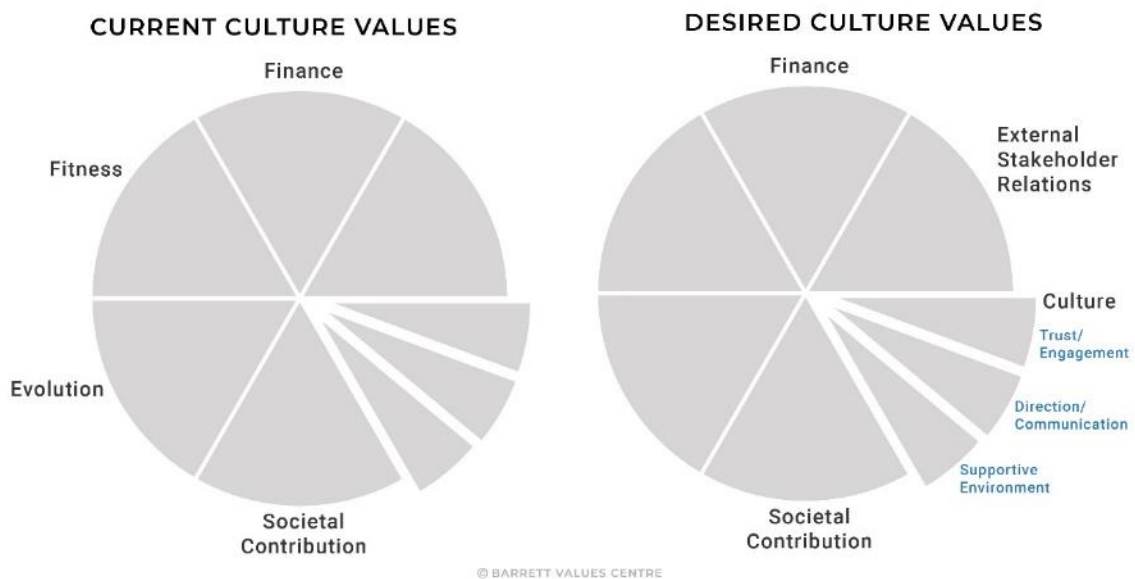
Level 6: Making a Difference

Level 6 focuses on deepening the internal connectedness and expanding the external connectedness. Inside the organisation it includes values such as mentoring, leadership development, and coaching. Outside the organisation it includes values such as strategic alliances, partnerships, customer and supplier collaboration, community involvement, environmental awareness, sustainability, and making a difference.

Level 7: Service

Level 7 takes internal connectedness to a deeper level and a more expanded external connectedness. Inside an organisation, it includes values such as wisdom, forgiveness, humility, and compassion. Externally it includes values such as social justice, long-term perspective, global perspective, ethics, and future generations.

THE BUSINESS NEEDS SCORECARD



While the Seven Levels Model examines values from a cultural perspective, the Business Needs Scorecard (BNS) places the values in a business context. By looking at the areas of current and desired focus, the BNS can be used to help guide an organisation's strategy for long-term success. These areas include:

Finance

Finance looks at economic health and financial growth with values and behaviours that have a direct impact on growth, the bottom line and investor interests.

Fitness

Fitness focuses on performance, systems and processes. Values and behaviours here have a direct impact on performance, quality and the effective delivery of products/services.

External Stakeholder Relations

External Stakeholder Relations highlights relationships with customers and other external stakeholders. This area includes values and behaviours that have a direct impact on the relationship with customers, the market, suppliers, and other strategic partners.

Evolution

Evolution covers innovation, group development and learning. Values and behaviours represented here have a direct impact on the development of people, processes, products/ services and ways of thinking.

Societal Contribution

Societal Contribution indicates emphasis on social and environmental responsibility. Values and behaviours appearing in this area have a direct impact on the relationship of the organisation to the local community or society.

Culture

This section includes the values and behaviours that have an impact on the culture of the group and is split into three subsections:

Trust/Engagement

Trust/Engagement relates to employees feeling empowered and able to contribute. This area includes values and behaviours that bring people together, build mutual confidence and encourage employees to participate.

Direction/ Communication

Direction/Communication shows focus on decision making and how people communicate. Values and behaviours that guide decision making and express how people communicate and exchange information are seen here.

Supportive Environment

Supportive Environment concerns employees feeling cared for and treated fairly. Values and behaviours in this area have a direct impact on how people are treated and looked after within the organisation.

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