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SUCCESS
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THE PRIORITIZED LEADER

REPORT PREPARED FOR
Frank Duex
11-14-2019



Frank, thanks for taking the *Prioritized Leader Assessment*. This report has been tailored to help you understand where your true priorities are as a leader and how you can best recalibrate them to maximize your influence and impact. We know that if your priorities are in the right order, you will not only do well in business, but also energize and empower those around you. However, if your priorities are out of order, even if your heart is in the right place, you will always desire more, yet never really get there. None of us want to leave potential on the table! This report will help to affirm your strengths, identify weaknesses and blind-spots, and offer workable solutions.

PROGRESS NOT PERFECTION

This assessment will guide you through a process of self-discovery that leads to personal, professional, and organizational breakthrough. Honestly reflecting on your results, inviting others into the process and creating relevant action plans will put you on a track toward greater success. Put simply, we want you to become the best possible version of yourself and the best leader for your team.

REPORT STRUCTURE

Frank, your report is divided into **FIVE** major sections. The *first* section is a summary of your overall results based upon how you ordered the Five Priorities. Section *two* dives deeper into each of the Five Priorities, giving insight into your areas of strength and weakness. Section *three* offers suggested next steps and prescriptive pathways to become a better leader. Section *four*, dives deeper into the gaps, strengths and weaknesses of your scores. In section *five*, we'll offer additional goal-setting opportunities to assist you in documenting tangible next steps that will comprise your action plan.

GETTING THE MOST OUT OF YOUR REPORT

Carefully review: The scores shown are not intended to be absolute. Instead, view them as indicators to be further explored.

Seriously consider: Which work and life choices have led you to align your priorities in the way you have? The exercises and next step questions that follow are designed to help you build an action plan to thrive personally and professionally.

Be authentic: This process works best when we choose to be honest and transparent.

Take action: Don't settle for just talking about change. Rather, consider which specific next steps and behaviors, if implemented, would lead to meaningful transformation.

Share with others: Whether it's with your boss, coach or colleagues, take the opportunity to invite others into your plan to thrive. Remember, change is always more difficult when we walk alone; it is in sharing with others that we find encouragement and accountability.



THE IDEAL ORDER OF THE FIVE PRIORITIES

Freakonomics, written by Levitt and Dubner and published in April of 2005, describes how the world is run by different kinds of capital within a surprisingly complex market system. The book got our team thinking. We concluded that there are five essential priorities available to us. There is an optimal order to these priorities, and each one has its own currency, or way that it manifests itself. If we keep these priorities aligned properly, we will experience unprecedented success personally and professionally.

The old saying is still true: "As the leader goes, so goes the company." Organizations can only reach their desired levels of health, productivity and profitability if their leaders model attitudes and behaviors worth following. Leaders worth following are humble and hungry. They are characterized by their investment in personal and organizational growth and their commitment to keeping the right priorities in the right order. Companies known for their empowering culture hold fast to the following ordering of priorities:



1. Purpose: The vision to see, articulate and go for a compelling future. The currency is integrity and inspiration.

Purpose, at its core, is knowing what you are here to do. You are living with purpose when helping your organization actualize goals and priorities as they align with the company's values and vision. Individually, it means you have clarity of vision and depth of intentionality. Your growing self-awareness illumines the unique, positive contribution you're able to make. Healthy leaders pursue a purpose bigger than themselves, and encourage others to do likewise. This shared big-picture perspective brings alignment, focus and discipline to teams throughout the organization. Clarity of vision, combined with adherence to a set of values, maximizes the potential of the organization, ensuring the "why" ultimately informs their "what" and "how".



2. People: The level of health and productivity we have with our colleagues and connections. The currency is encouragement and accountability.

Our people priority is second. Our day-to-day interactions with colleagues and customers either fuels empowerment or drains the life out of a healthy, productive culture. Skillfully bringing encouragement and accountability at the right time (and in the right manner) is the best way to invest in your most valuable asset: your people. Sustainable organizational success always relies upon ongoing and progressive people development.



THE IDEAL ORDER OF THE FIVE PRIORITIES - (Cont.)



3. Pace: Discerning how quickly or slowly the organization and its personnel need to move to sustain long-term success, maximize opportunities, and grow capital. The currency is time and energy.

As we descend our hierarchy of priorities, pace comes next. Pace is more important than the following two priorities of perception (intellect) or profit. Think about it this way: If you get too stressed to work effectively, your profits will suffer. If you are burned out and exhausted in your role, you won't have the mental energy to innovate or solve problems. No amount of money or creativity can replace the value of being content in your job, and devoting time, energy, and attention to the projects that matter.



4. Perception: Choosing a growth mindset and staying open to creative solutions and new ideas. The currency is insight and innovation.

The perception priority unleashes the intellectual and creative firepower that drives innovation and complex problem solving. It is more valuable than money because we can't creatively innovate simply by spending a lot of cash. We can throw all the money in the world at a problem, but it won't get solved without bringing the innovative and intuitive powers of perception to bear.



5. Profit: The effective management, investment and release of an organization's resources. The currency is dollars and cents.

Profit is lowest in our hierarchy of priorities, which might surprise many business owners. Of course, profitability is mission critical; and if we have all of our other priorities in order, it will be a natural outcome. Businesses get into trouble by over-valuing or devaluing profit. When we over-value it and sacrifice other priorities to obtain it, like purpose, people, energy calibration or innovation, we undermine the very things that made us profitable in the first place. On the other hand, when we devalue profitability by not paying attention to the bottom line or spending irresponsibly, we ultimately will not have the funds to pay the salaries to fulfill the vision. The key is to take the long-range view in this area.



YOUR FIVE PRIORITIES

Below, we have ordered the Five Priorities based on your responses. While we could have done the analysis for you, there's value in processing and comparing your results personally. Profound insights ensue when participants reflect on the two columns in light of their current circumstances as well as the optimal ordering of the priorities.

Left Column

Displays the *actual order* of your priorities - the current objective order of your priorities as they are right now, or where they have been in the past, ranked highest to lowest. This is based upon your responses to the 50 questions and reveals your subconscious assessment of the Five Priorities.

Right Column

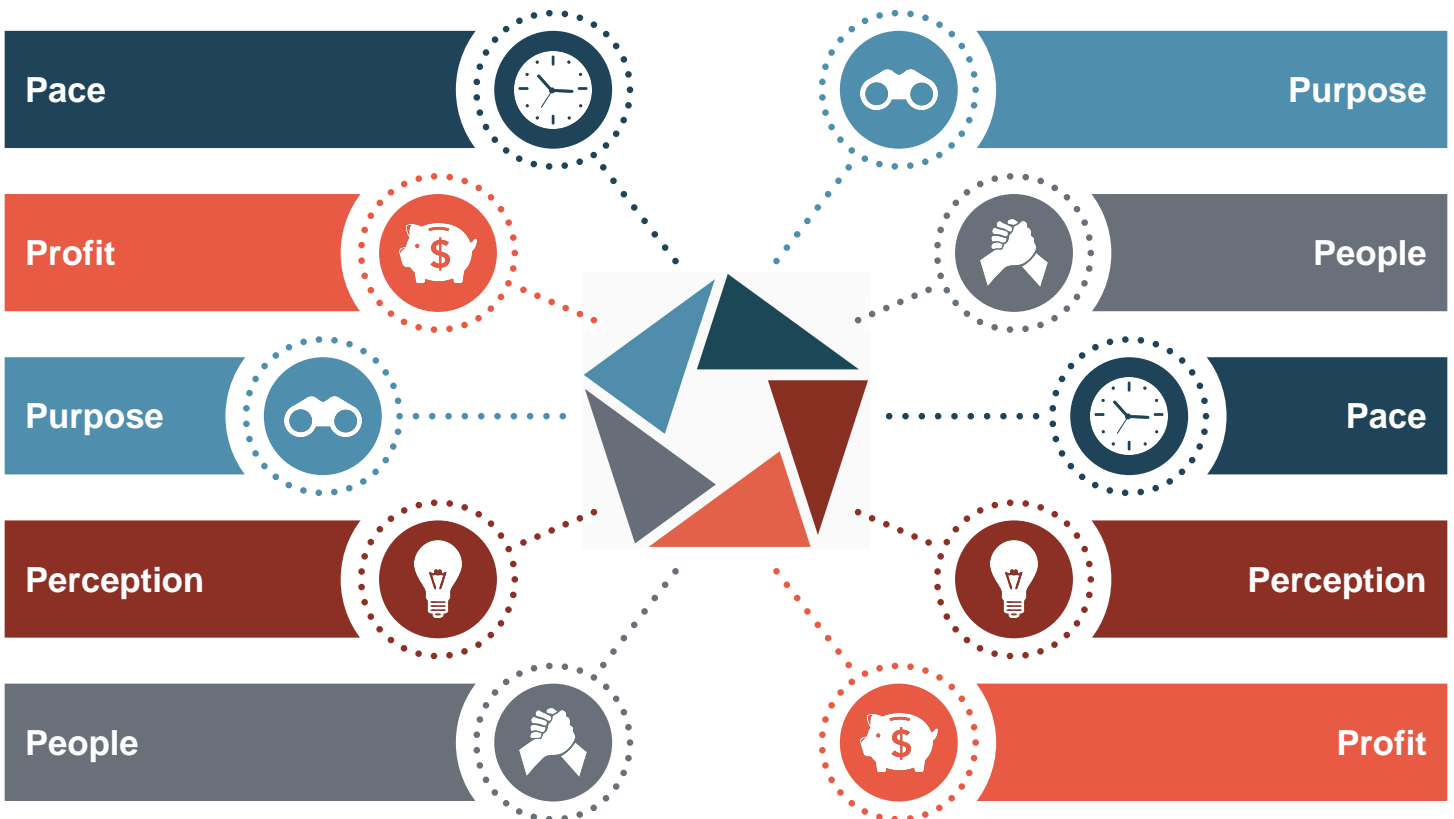
Displays the *optimal order* of your priorities.

Left Column

Your actual order

Right Column

The optimal order





REFLECTION QUESTIONS:

1. Do you feel your assessed order accurately reflect the realities in your life and business right now? Yes or No? Why?

2. Contrast the two columns: Are they in the same order? Are they different? Which column resonates the most with you and why?

3. How do these results give insight into what's happening in your life and organization right now?



UNDERSTANDING YOUR SCORES

Frank, the graphic below visually illustrates your scores in each of the Five Priorities and an overall score. The graphic is also color-coded to indicate strengths and weaknesses in each area.

GREEN Indicates you had a total score at or above 4.0 for this priority. This signifies an area of strength for your company. Keep in mind, even though you scored high in this area overall, we will highlight specific statements to which you scored 3.0 or lower that reveal opportunities to grow that will help you and your business to fully thrive.

YELLOW Indicates a score between 2.6-3.9 and demonstrates some progress or strength within the priority. Your company is experiencing success with certain aspects of this priority, but there are deficiencies as well. For those statements to which you scored 3.0 or lower, we'll offer ideas and solutions to help the organization grow.

RED Indicates a score at or below 2.5. This conveys a significant deficiency in this priority. You probably have already recognized the weakness of this area in your organization. Intentionality and perseverance will be required to turn things around.





ENGAGING WITH EACH PRIORITY

Now it's time to examine the scoring details of each priority. This report intentionally arranges the Five Priorities based on the ideal order for living a life and leading a business that thrive. This will help you put "first things first" as you work through your next steps.

Keep in mind, the goals are personal development and corporate success, not downloading clever information. Therefore, we aren't expecting (or suggesting) that you work through this report in one sitting. This is a life-long journey! Remember, the best leaders and best companies are learners. So, don't go too fast!

 PURPOSE PRIORITY	 2.9 out of 5 Stars
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Frank, your purpose priority score puts you in the **yellow** range which indicates you have a general sense of where your life and work are heading, but your vision is clouded. You live and work with integrity most of the time, but you lack energy and focus for the future.

Statement Analysis

Below you'll find a list of questions from the assessment which you scored 3.0 or less. We've called out your yellow and red scores to create the opportunity for you and your company to explore specific actions to grow in these areas. Remember, we are looking for progress rather than perfection.

1. This organization has a compelling vision, which attracts top industry talent.

READ

"If you are working on something exciting that you really care about, you don't have to be pushed. The vision pulls you." - Steve Jobs

REFLECT

Is there a lack of excitement about the company's vision? Does it seem too small, out-of-date, or misdirected? How would you articulate a more inspiring vision?



Statement Analysis (Cont.)

RESPOND

Write down the things that once excited you about your company's vision. Look for creative ways to re-engage those aspects of the organization and see if your passion is stirred. If this isn't a good option, consider preparing yourself for a different role that would more directly touch upon what you care about.

2. I am not sure that my vision fits the organizational culture.

READ

"Here's to the crazy ones. The misfits. The rebels. The troublemakers. The round pegs in the square holes. The ones who see things differently. They're not fond of rules. And they have no respect for the status quo. You can quote them, disagree with them, glorify or vilify them. About the only thing you can't do is ignore them. Because they change things. They push the human race forward. And while some may see them as the crazy ones, we see genius. Because the people who are crazy enough to think they can change the world, are the ones who do." - Steve Jobs

REFLECT

What is it about the company or your role that causes you to feel like you don't fit or belong? Do you and company leaders care deeply about the same things? Are you in the wrong position? Are you working for the wrong organization?



Statement Analysis (Cont.)

RESPOND

Find someone you trust at work to give you honest feedback about your fit with the organization. Do you have a good grasp on what the company most values and why? Do you know why the company was started in the first place? Invest in more training, your workplace relationships, or your work/home life balance to gain a fresh perspective.

3. I lead with a clear vision for the future, which directly connects with the established company goals.

READ

"The very essence of leadership is that you have to have a vision. It's got to be a vision you articulate clearly and forcefully on every occasion. You can't blow an uncertain trumpet." - Reverend Theodore Hesburgh

REFLECT

What is clouding your vision? Why don't you have a strong sense of where the company needs to go next? What do you need in order to gain more clarity?



Statement Analysis (Cont.)

RESPOND

Write your response to this question: "If you were the CEO of this company and could accomplish anything over the next 5 years, what would you go for?" Remember, vision describes the destination you want to arrive at in the future. Be bold and confident as you communicate that vision clearly.

4. Employees can communicate the values of the organization from memory on a moment's notice.

READ

"In order to carry a positive action we must develop here a positive vision." - Dalai Lama "The greatest leaders mobilize others by coalescing people around a shared vision." - Ken Blanchard

REFLECT

Does your team struggle articulating the company's values because they are not written in a memorable and meaningful way? What is your team's next step in better understanding and aligning with the underlying values?



Statement Analysis (Cont.)

RESPOND

Once a company's values become evident, the difficult work of communication and continual reinforcement begins. Values answer critical questions: Why do we exist? What do we care most about? What kind of organization do we want to be? Be intentional about coalescing others around your shared values.

5. I am proud to be a part of this business.

READ

"Never doubt that a small group of thoughtful, concerned citizens can change the world. Indeed, it is the only thing that ever has." - Margaret Mead

REFLECT

People feel more connected to their work when they can see the meaning behind what they do - connecting to the overall vision of the company. If you are not enthusiastic about the vision of your company makes, is it because of the company itself or your attitude toward your work?



Statement Analysis (Cont.)

RESPOND

Look beneath the surface to see how your company makes a contribution to society. If your company went out of business tomorrow, who would be adversely affected? If the answer isn't readily apparent, search to find a more meaningful role within your organization.

6. The company's established values guides decision-making.

READ

"It is not hard to make decisions once you know what your values are." - Roy E. Disney

REFLECT

Consider making a new commitment to the timeless values of honesty and integrity. How would your leadership track record improve if you decided that these values were more important than short-term outcomes?



Statement Analysis (Cont.)

RESPOND

Successful companies ensure their vision and values are well thought through, regularly re-evaluated, and function as the lenses for all strategic decisions. If clarification is needed, then do the hard work to say what you mean; if better communication is needed, find creative ways to consistently recast the vision. Ultimately, do everything you can to make certain the company's vision and values are well crafted, widely understood, and lived out top to bottom.

7. Company leadership is united around the company's strategic vision.

READ

"Greatness starts with a clear vision of the future." - Simon Sinek "My own definition of leadership is this: The capacity and the will to rally men and women to a common purpose and the character which inspires confidence." - General Montgomery

REFLECT

What makes you believe company leadership lacks unity? If you serve on the executive leadership team what steps can you take to address this? If you don't serve on that team, how can you influence one or more members to take a serious look at this issue?



Statement Analysis (Cont.)

RESPOND

Exert whatever influence you can to encourage organizational leaders to have serious and constructive dialogue about a unifying vision for the company's future. A good coach or consultant can help to facilitate these conversations. Do your research and tap into the best resources.

SUMMARIZING YOUR WORK

Frank, great job working through your purpose priority detailed report. As you look back on your work, take the opportunity to summarize any insights you don't want to forget.

Are you happy with your purpose priority score? How could it be improved?

Key Points / Action Steps to remember

1. _____
2. _____
3. _____
4. _____
5. _____



PEOPLE PRIORITY



2.3 out of 5 Stars

Frank, your people priority score puts you in the red range which indicates you can feel isolated from time to time. You would like to have a closer working relationship with your team. There is little accountability and can seem like no one take any personal responsibility for excellence.

Statement Analysis

Below you'll find a list of questions from the assessment which you scored 3.0 or less. We've called out your yellow and red scores to create the opportunity for you and your company to explore specific actions to grow in these areas. Remember, we are looking for progress rather than perfection.

1. This company prioritizes the relational health of employees.

READ

"A good leader leads the people from above them. A great leader leads people from within them." – M.D. Arnold

REFLECT

Why do team and employees feel undervalued in your company? Is there anything you are doing to perpetuate the dysfunction?

Three horizontal lines for reflection notes.

RESPOND

Strategize on how to help your organization better care for their employees. Do something tomorrow to let an individual or team know how much they are appreciated.

Three horizontal lines for response notes.



PEOPLE PRIORITY



2.3 out of 5 Stars

Statement Analysis (Cont.)

2. I am empowered to do my best.

READ

"The best executive is the one who has sense enough to pick good men to do what he wants done, and self-restraint enough to keep from meddling with them while they do it." - Theodore Roosevelt

REFLECT

Is your supervisor more high invitation positive, affirming) or high challenge (speaking truth, high expectations) by nature? Does he or she delegate and release, or delegate and micromanage? How can you start influencing up the org chart?

RESPOND

Be intentional about building trust and relational health with your supervisor. Once that is established, then gently and respectfully set appropriate boundaries with the goal of maximizing your productivity.

3. Professional development opportunities are available to those who are interested.

READ

"Empires of the future are empires of the mind." - Winston Churchill



Statement Analysis (Cont.)

REFLECT

Why are there limited opportunities for training and development in your organization? Why doesn't the company invest more in its people?

RESPOND

Successful companies attract and retain the brightest and best. If there is a lack of investment to get and keep good talent, go back to the drawing board and rethink your vision, values, and key strategies.

4. I am treated as a valued member of the company and my efforts are acknowledged.

READ

"Great things in business are never done by one person. They're done by a team of people." - Steve Jobs

REFLECT

Explore why you feel undervalued and unacknowledged. Do your good ideas directly correlate to the organization's goals? Have you shown yourself to be a person of high character and competency?



Statement Analysis (Cont.)

RESPOND

Proactively begin bringing more value to the people and projects at work. Decide upon one thing you can do this week to bring needed encouragement or accountability.

5. Employee concerns are taken seriously.

READ

"An employee's motivation is a direct result of the sum of interactions with his or her manager." - Bob Nelson

REFLECT

Is there an "Us and Them" mentality between upper management and the rest of the team? Why are some people not given a voice and treated with respect? Are valid concerns being expressed constructively?

RESPOND

Reopen the lines of communication between upper management and the workforce. Address and resolve constructive, reasonable complaints and deal gently, yet firmly, with personal preferences or old grudges. Craft policies and processes to encourage feedback up the corporate ladder.



Statement Analysis (Cont.)

6. I believe there is a healthy level of accountability in the organization.

READ

"Creating a culture of integrity and accountability...generates a respectful, enjoyable and life-giving setting in which to work." - Tom Hanson

REFLECT

Is there too little or too much accountability? Do you feel micromanaged? Or conversely, do you feel like no one knows or cares about what you are doing?

RESPOND

Healthy accountability holds people responsible for their work in a context that provides the necessary authority and latitude to meet or exceed expectations. If you struggle being held accountable, or if you struggle holding others accountable, reflect upon the underlying causes.

7. Employees enjoy winning together and celebrating those wins.

READ

"Outstanding leaders go out of their way to boost the self-esteem of their personnel. If people believe in themselves, it's amazing what they can accomplish." - Sam Walton



PEOPLE PRIORITY



2.3 out of 5 Stars

Statement Analysis (Cont.)

REFLECT

Does your company raise the bar the moment a goal is reached, without stopping to celebrate the win? Do people feel worn out from this relentless over achievement?

RESPOND

People are far more productive over the long haul when they get to catch their breath and celebrate the wins along the way. Be intentional about pausing when goals are reached to enjoy the moment together, rest, and recharge before surging ahead.

8. Regular reviews are conducted in an honest, positive, and constructive manner.

READ

"The key is keep company only with people who uplift you, whose presence calls forth your best." - Epictetus

REFLECT

Do people have to wait until their annual review to get performance feedback? Are managers giving encouragement and correction along the way? What ideas do you have to improve communication and helpful feedback?



Statement Analysis (Cont.)

RESPOND

Everyone needs the right balance of invitation (encouragement and affirmation) and challenge (feedback and accountability). Determine to give constructive input formally and informally. Make sure the tone is honest and positive.

SUMMARIZING YOUR WORK

Frank, great job working through your people priority detailed report. As you look back on your work, take the opportunity to summarize any insights you don't want to forget.

Are you happy with your purpose priority score? How could it be improved? What might it look like for you and your organization to build stronger relationships? Identify 1-3 people you'd like to collaborate with. How might you engage them?

Key Points / Action Steps to remember

1. _____
2. _____
3. _____
4. _____
5. _____



PACE PRIORITY



3.3 out of 5 Stars

Frank, your pace priority score puts you in the **yellow** range which indicates you are either running a bit too hard resulting in fatigue and poor follow through, or you are moving a bit too slow to innovate and stay on the cutting edge. Your company gets enough done to stay afloat, but they fail to maximize the time and energy available.

Statement Analysis

Below you'll find a list of questions from the assessment which you scored 3.0 or less. We've called out your yellow and red scores to create the opportunity for you and your company to explore specific actions to grow in these areas. Remember, we are looking for progress rather than perfection.

1. The pace of the organization fosters a healthy work-life balance.

READ

"There's no question that workplace wellness is worth it. The only question is whether you're going to do it today or tomorrow. Get it on today." - Warren Buffett

REFLECT

Does your company culture value rest and recreation? Do you struggle stepping away from job responsibilities to recharge your batteries or invest in relationships and hobbies outside of work?

RESPOND

When we rest and recharge, the resulting energy boost can move us forward in creativity and problem solving. Be intentional about making the most of your vacation days and personal time. How can you maximize your time off the remainder of this year?



PACE PRIORITY



3.3 out of 5 Stars

Statement Analysis (Cont.)

2. Office politics negatively impact our company's productivity.

READ

"Leadership is a potent combination of strategy and character. But if you must be without one, be without the strategy". - Norman Schwarzkopf

REFLECT

How pervasive are gossip and backbiting where you work? Is this something you indulge in as well? How can you better focus on limiting drama and increasing productivity?

RESPOND

Resolve to be a person of high character. Make these decisions: (1) to not say anything about someone that you would not feel comfortable saying in their presence, and (2) refuse to engage in negative and inappropriate conversations about others. Ultimately, look for ways to encourage others to go to the source and speak directly to those involved in the issue.

3. The company has the time to make necessary adjustments to capitalize on emerging trends.

READ

"Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall." - Stephen Covey



PACE PRIORITY



3.3 out of 5 Stars

Statement Analysis (Cont.)

REFLECT

This response reveals that the organization's leaders and/or culture lack the flexibility to adapt to new opportunities and emerging markets. What factors prevent the company from scaling? How can you better influence the culture toward a more nimble and risk-tolerant mindset?

RESPOND

Good leaders have bifocal vision: they scan the horizon while paying attention to the day-to-day. The ability to both anticipate future dangers and opportunities and the know how to execute on today's commitments are vital. Help your company become more flexible in their thinking about changes today that could lead to an enriched reality tomorrow.

4. The tasks I do are well matched to my temperament and skill set.

READ

"Never take a path that has no heart in it. You can't lose if your heart is in your work. But you can't win if you heart is not in it." - Carlos Castaneda



PACE PRIORITY



3.3 out of 5 Stars

Statement Analysis (Cont.)

REFLECT

How much time and effort have you invested to truly understanding yourself? How well can you navigate offloading tasks that are not strengths for you? Do you have healthy boundaries for guarding your energy?

RESPOND

Talk with your boss about your current workflow and share which areas are not a good fit for you and which areas you excel. Talk with hi/mher about off loading some of these less compatible tasks in exchange for either more time to focus on what remains or more tasks that are a better fit. Remember, this must be a win/win!

5. Company leaders reward a balance of work, family, and personal time.

READ

"Imagine life as a game in which you are juggling some five balls in the air. You name them - work, family, health, friends and spirit and you're keeping all of these in the air. You will soon understand that work is a rubber ball. If you drop it, it will bounce back. But the other four balls - family, health, friends, and spirit - are made of glass. If you drop one of these, they will be irrevocably scuffed, marked, nicked, damaged, or even shattered. They will never be the same. You must understand that and strive for balance in your life." – Brian Dyson, Coca-Cola



PACE PRIORITY



3.3 out of 5 Stars

Statement Analysis (Cont.)

REFLECT

Does your manager represent the culture of the company overall, or does he or she struggle to maintain a healthy work/life balance? What problems have their lack of boundaries caused? Do you feel pressure to follow their lead?

RESPOND

Be true to what you know is best in how you balance work and family. Ask colleagues, friends and family to speak up if they see you getting off track. Consider helpful ways you could bring your manager the invitation or challenge they may need.

6. My work is always urgent leaving little time for the long-term view.

READ

"You can't do traditional work at a modern pace. Traditional work has traditional rhythms. You need calm. You can be busy, but you must remain calm." - Bill Buford



PACE PRIORITY



3.3 out of 5 Stars

Statement Analysis (Cont.)

REFLECT

What are the consequences of your being in bondage to "the tyranny of the urgent?" How does that affect your ability to complete the most important tasks? Why are you so often consumed by the urgent?

RESPOND

If our work lives are characterized by the stress of fighting fires of urgency, we will limit our effectiveness. Schedule a monthly or weekly personal retreat to step back and look at the big picture of what is important versus what feels urgent. Enlist the help of an objective colleague and turn it into a lunch or coffee.



PACE PRIORITY



3.3 out of 5 Stars

Statement Analysis (Cont.)

SUMMARIZING YOUR WORK

Frank, great job working through your pace priority detailed report. As you look back on your work, take the opportunity to summarize any insights you don't want to forget.

What robs the organization of the needed time and energy to thrive? Are key leaders taking ownership of their schedules with intentionality? What is one area your company could start improving immediately?

Key Points / Action Steps to remember

1. _____
2. _____
3. _____
4. _____
5. _____



PERCEPTION PRIORITY



2.9 out of 5 Stars

Frank, your perception priority score puts you in the **yellow** range which indicates you are interested in learning and finding creative solutions, but feel stifled in some ways at the same time. Organizational culture rewards ideas that work, but doesn't embrace the creative process fully.

Statement Analysis

Below you'll find a list of questions from the assessment which you scored 3.0 or less. We've called out your yellow and red scores to create the opportunity for you and your company to explore specific actions to grow in these areas. Remember, we are looking for progress rather than perfection.

1. Creativity is a high value in the organization.

READ

"Creativity is the depth of the honesty you express towards your possibility." - Paramahansa Nithyananda

REFLECT

Why do you think the company doesn't value creativity? Are they satisfied with what has already been achieved? Are they afraid to take risks?

RESPOND

Commensurate with your level of influence, think of a few practical ways you can engender more creativity this month. Start by making space for your own creative powers to awaken. Schedule a personal retreat, take a vision trip to an unusually creative organization, or spend an entire day looking at the company from a different point of view and record what you notice.



PERCEPTION PRIORITY



2.9 out of 5 Stars

Statement Analysis (Cont.)

2. This organization invests heavily in research and development.

READ

"I didn't follow the policies of those already in the business. If I had, I would never have made a go of it. Instead, I started out with the determination to make a better nickel chocolate bar than any of my competitors made, and I did so." - Milton Hershey

REFLECT

How dependent upon a robust research and development budget are successful companies in your industry? If the innovation pipeline is crucial, yet undervalued by your organization, how can you communicate this reality to the right people?

RESPOND

Demonstrate empirically (if possible) to company leadership the cost of not investing in research and development. Find the best people to lead the innovation impetus for your organization and keep communication lines open across departments to ensure they are researching and developing products that will generate significant ROI going forward.



PERCEPTION PRIORITY



2.9 out of 5 Stars

Statement Analysis (Cont.)

3. The company is consistently searching for creative ways to improve.

READ

"The relevance of strategy, people, processes, structure, leadership and everything else in a company is determined by the extent to which they contribute to the creation of a great product." - Michael Kouly

REFLECT

Is your team too 'busy' to be creative? Is the daily grind preventing the group from finding ways to do what you do better? Is the "tyranny of the urgent" eclipsing innovation, or are there other factors at play?

RESPOND

We all struggle with the double task of working in the business and working on the business. As you consider the next quarter (or the next fiscal year), create space in the budget and calendar to stir reflection and creativity. Bring in a highly recommended coach or consultant or plan an off-site meeting that people will get excited about. If those options are too costly, purchase a great book for the team and hold monthly "Lunch and Learns" to discuss it.



PERCEPTION PRIORITY



2.9 out of 5 Stars

Statement Analysis (Cont.)

4. Employees who take innovative risks are rewarded.

READ

"It's important to create a culture of innovation - one that both values and rewards risk." - Barbara Landes

REFLECT

Is there a perfectionism plague in your corporate environment that allows only fully baked, safe ideas to flourish? How can your company begin honoring those team members who bring forth innovation, whether their ideas get implemented or not?

RESPOND

Rewarding those who strive for innovation motivates everyone to think outside the box and stirs new and better ideas. Be intentional about encouraging your creative thinkers, making it worth their while to invest the energy and share their ideas. Create the necessary space and give the freedom for ideas to flow.

5. The company is losing it's competitive advantage.

READ

"Innovation is moving at a scarily fast pace." - Bill Gates "The true sign of intelligence is not knowledge but imagination." - Albert Einstein



PERCEPTION PRIORITY



2.9 out of 5 Stars

Statement Analysis (Cont.)

REFLECT

Why do you believe the competition is outpacing the company? Has a complacent, self-satisfied attitude set in? Or, are people so tired they have simply lost sight of what is happening in the broader market?

RESPOND

Do an updated SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis with your team or company. Be brave enough to take a long hard look at the reality of your situation within the market. Take stock with blinders off and an open attitude. Based upon this information, craft a fresh strategy for fulfilling the organization's vision, values and goals.

6. I am excited by the ideas that we generate as a team.

READ

"An organization's ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage." - Jack Welch



PERCEPTION PRIORITY



2.9 out of 5 Stars

Statement Analysis (Cont.)

REFLECT

What is stunting your enthusiasm for your team's ideas? Are they not generating enough good ideas or too many bad ideas? Is the source for your lack of excitement external or internal?

RESPOND

If the ideas being generated by your team are mediocre, plan an offsite excursion. During this time away, renew relationships, remind everyone of the vision and values, and spend time brainstorming new ideas. Make sure that in the true spirit of collaboration people do not feel judged, but instead feel free to think creatively and go big with their ideas.



PERCEPTION PRIORITY



2.9 out of 5 Stars

Statement Analysis (Cont.)

SUMMARIZING YOUR WORK

Frank, great job working through your perception priority detailed report. As you look back on your work, take the opportunity to summarize any insights you don't want to forget.

If you could grow intellectually in one area, what would it be? What keeps you and others in your organization from learning and growing? What might be a "small step" to start taking some ground in this area?

Key Points / Action Steps to remember

1. _____
2. _____
3. _____
4. _____
5. _____



PROFIT PRIORITY



3.1 out of 5 Stars

Frank, your profit priority score puts you in the **yellow** range which indicates that while there is a degree of financial strength to the organization, there is also anxiety about the future. The company has survived difficult seasons and leaders are wary of another downturn.

Statement Analysis

Below you'll find a list of questions from the assessment which you scored 3.0 or less. We've called out your yellow and red scores to create the opportunity for you and your company to explore specific actions to grow in these areas. Remember, we are looking for progress rather than perfection.

1. On average, people in this company feel that leadership allocates funds generously for compensation packages.

READ

"Paying your employees well is not only the right thing to do but it makes for good business." - James Sinegal
"Clients do not come first. Employees come first. If you take care of your employees, they will take care of the clients." - Richard Branson

REFLECT

How big of a problem is this? How much do you think it affects morale and motivation to accomplish the organization's vision and values? Are people just grumbling, or blatantly and openly looking to find better opportunities elsewhere?



PROFIT PRIORITY



3.1 out of 5 Stars

Statement Analysis (Cont.)

RESPOND

If you are a senior leader, commit to reevaluating the compensation packages across the board. Bring a few trusted employees into the process. What benefits could come of being perceived both inside the company and in the marketplace as a whole, as a place that values its staff and compensates with excellence?

2. Profits are clearly more important than staying aligned with the company's goals.

READ

"Making money isn't the backbone of guiding purpose: making money is the by-product of our guiding purpose. If you're doing something you love, you're more likely to put your all into it, and that generally equates to making money." - Warren Buffett "When you stop chasing money and start chasing purpose, you will find prosperity and peace." - Anonymous "Always deliver more than expected." - Larry Page

REFLECT

Does this attitude of profits over purpose come from the top of your organization? How does this gel with your own core values? How does profits over purpose translate when it comes to job satisfaction and a sense of meaning for the people in your workplace? How serious are the quality issues? Is the ship headed for an iceberg, or can it be turned around in time?



PROFIT PRIORITY



3.1 out of 5 Stars

Statement Analysis (Cont.)

RESPOND

Companies that afford people a solid purpose in their work and produce quality products and services enjoy the benefits of healthier cultures and increased profitability. Exert your influence to raise the topic of purpose, quality and profits, and their relationship. Encourage team leaders to articulate their own purpose statements that align broadly with organizational goals and influence up. Make sure everyone knows that lowering quality to increase profit is a short term win that sadly comes with dire long term consequences. Inspire leadership to focus on their 10-year vision.

3. Company leaders are clearly materialistic, expecting unrealistic outcomes.

READ

"The richest companies of the 21st century will be those that have replaced the words Markets with planet earth, and customers with people." - Michael Kouly

REFLECT

What are the signs that materialism is alive and well in your workplace? Is this a fair characterization? Can you describe the ways this reality negatively impacts the culture?



PROFIT PRIORITY



3.1 out of 5 Stars

Statement Analysis (Cont.)

RESPOND

We neglect the health of our corporate cultures when we hold money and things in too high a regard. Redirect your team to what really matters. Unpack purpose, respect people, calibrate pace, and invest in innovation rather than putting too much emphasis upon affluence.

4. I feel that I am compensated fairly for my skills and efforts.

READ

"Annual income twenty pounds, annual expenditure nineteen six, result happiness. Annual income twenty pounds, annual expenditure twenty pound ought and six, result misery." - Charles Dickens

REFLECT

Have you ever expressed the dissatisfaction you feel regarding your compensation to your supervisor? What steps would you need to take to prepare yourself for a higher paying job with your current company or a different company?



PROFIT PRIORITY



3.1 out of 5 Stars

Statement Analysis (Cont.)

RESPOND

Decide to either accept your current compensation or craft a game plan to lobby for a pay raise. Consult an online resource like glassceiling.com to objectively determine the typical pay range for your position in your market.

5. I would need to sacrifice my family or my health to climb this company's corporate ladder.

READ

"Imagine life as a game in which you are juggling some five balls in the air. You name them - work, family, health, friends and spirit and you're keeping all of these in the air. You will soon understand that work is a rubber ball. If you drop it, it will bounce back. But the other four balls - family, health, friends, and spirit - are made of glass. If you drop one of these, they will be irrevocably scuffed, marked, nicked, damaged, or even shattered. They will never be the same. You must understand that and strive for balance in your life." – Brian Dyson, Coca-Cola

REFLECT

Are you content in your current role? Are you satisfied with your level of compensation? Is this an opportune time to pursue a promotion or settle into your current role while pursuing the higher priorities of family, friends, and good health.



PROFIT PRIORITY



3.1 out of 5 Stars

Statement Analysis (Cont.)

RESPOND

Coach yourself through a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) of your current role and compensation compared with the promotion your are considering. If you find this difficult, ask a colleague or coach to help you. After examining the pros and cons, be sure to consult your personal core values and the people closest to you before opting to stay put, pursue the promotion, or look for a different opportunity altogether.

SUMMARIZING YOUR WORK

Frank, great job working through your profit priority detailed report. As you look back on your work, take the opportunity to summarize any insights you don't want to forget.

What are the next steps for the company financially? Are there opportunities to explore? If so, where? Is there a "clear next step" to help your organization strengthen their position?

Key Points / Action Steps to remember

1. _____
2. _____
3. _____
4. _____
5. _____



GOING DEEPER: GAP ANALYSIS - INDIVIDUAL VS ORGANIZATIONAL

Well done Frank! You've worked hard taking a look at the order of your priorities and processing the low scores within each priority. Now, we want to help you take your insights even further.

Have you ever heard this phrase?

"Perception is reality in the eye of the beholder." ~ Eric Bibi

What we perceive to be real is our "truth", whether it's objectively true or not! It is entirely possible, therefore, that something you thought to be true about yourself (or the organization) actually isn't true. This section compares the perceptions of what you see as true of the organization with yourself. The purpose is to clarify how aligned (or misaligned) you are compared to where you believe the organization is currently. There is often a disconnect between the strengths and weaknesses you see in the organization compared to your own personal strengths and weaknesses.

By clarifying (or naming) what's working or not working between you and your company, you'll be better equipped to identify the problem, brainstorm solutions and put an action plan in place.

Below you have the opportunity to compare your personal strengths and weaknesses with the organization's in each of the Five Priority categories. Large gaps between the two scores generally indicate significant disconnect between you and the organization. Smalls gaps suggest a high level of alignment. However, the results could be either positive or negative depending on whether the alignment is on a high or low score.

The Purpose Gap



You have a clear sense of where you are going, your next steps, and are passionately pursuing a vision that deeply matters. However, you may perceive that the organization is adrift, lacking the clarity and focus a compelling vision engenders. You might be frustrated, or you may have already mentally checked out. Who do you need to talk to about this? Are there others who feel the same way? What would it look like for you to bring compassionate challenge to the leaders who set direction?

Insights and Reflections:



The People Gap



Apparently, while you may feel confident in how you interact and collaborate with others on your team, you perceive that the company's ability to support and value its people has room for improvement. How can you be part of the solution as a leader, helping move the company toward greater health in this area for the benefit of everyone employed there? Leverage your relational strengths to encourage the culture to shift toward healthier communication and cooperation.

Insights and Reflections:



The Pace Gap



You feel positive about the sustainability of your work and the company's expectations of its employees. Congratulations! You are successfully managing workflow and balancing career and your personal life well, and your company does not push people too hard or under challenge. What strategies can you put into place to keep yourself and the organizational culture consistently on this healthy path?

Insights and Reflections:



The Perception Gap



Your scores indicate you are probably a creative, innovative, entrepreneurial type, working within a company that does not really value new ideas and possibilities. This culture might seem stifling or close-minded to you. As new ideas or creative solutions are suggested, their lack of consideration could make you feel undervalued and underutilized. Take steps to guide the company out of its innovative rut by calling out and releasing the creative types (like you) to generate new ideas.

Insights and Reflections:



The Profitability Gap



Your results indicate that the company pays you well and you feel generously compensated for the work you do. However, from a big picture perspective, there's a lack of ownership from the leadership of the organization (which could be dampening your own sense of ownership). You might wish that others took the success of the organization more seriously and invested accordingly. Consider how your example and influence might help others to engage.

Insights and Reflections:



GOING DEEPER: STRENGTHS AND WEAKNESSES

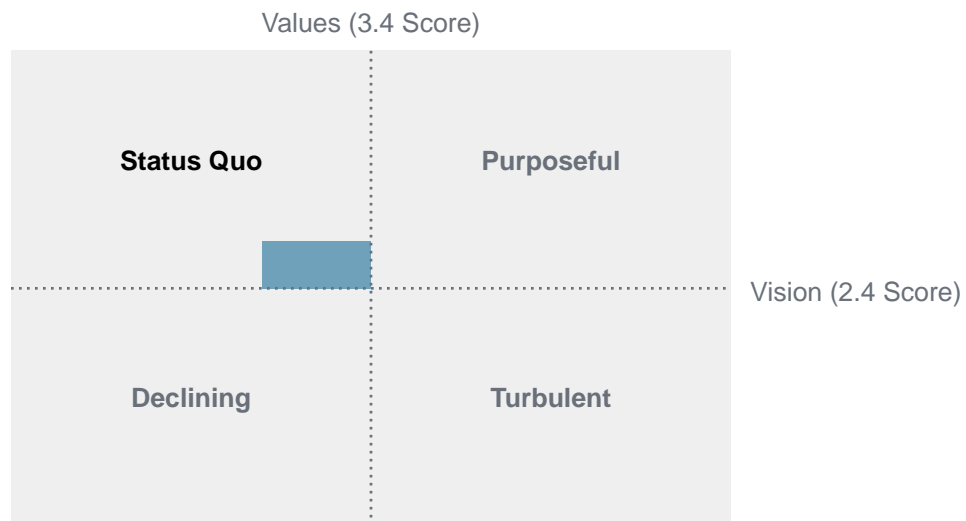
Each of the priorities in this section has two key components which can help you better understand why you scored high or low in any of the Five Priorities. Engaging with the information below will help you better define and target the real growth opportunities. Explore your results to determine where best to start and then complete the action plan below.



Purpose - Values and Vision

The vision to see, articulate and go for a compelling future. The currency is integrity and inspiration.

Leaders probably operate with a clear code of conduct, that permeates throughout the entire organization. Company values are clear, set and lived out. However, these same leaders might lack a compelling vision, which brings the big-picture focus and energy needed to see the company grow. We encourage leaders to get away, to get above the tyranny of the urgent, and begin dreaming (envisioning) about what the company could look like and achieve in the next 2 – 5 years. (Consider tapping the expertise of an experienced coach.)



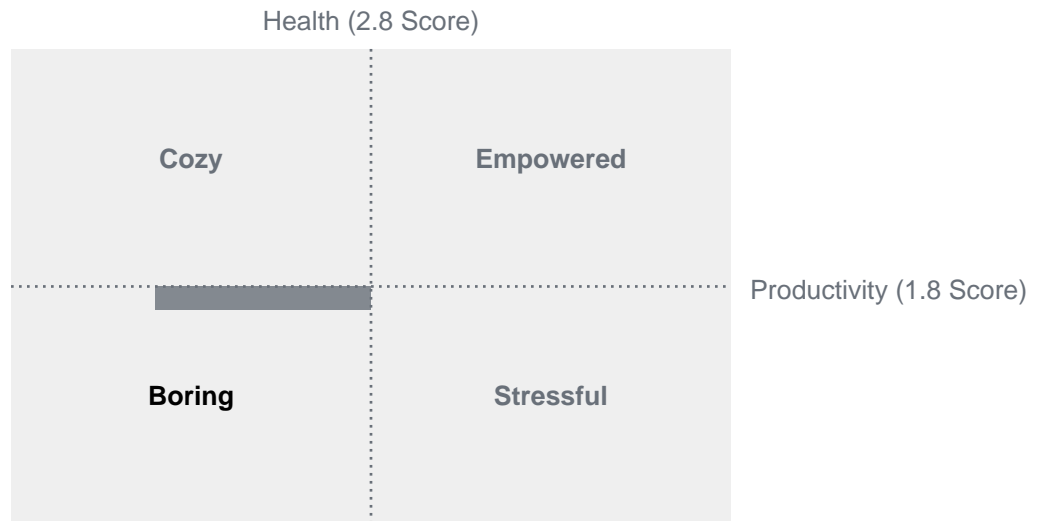
Insights and Reflections:



People - Health and Productivity

The level of health and productivity we have with our colleagues and connections.
The currency is encouragement and accountability.

Sadly the leadership in your organization may have given up, and it is time to focus on your people. Relationships within your team probably need to be revived and the strategic vision refreshed. You need a season of connectivity, unity and celebrating wins as you address the root causes of low productivity. Start small by doing things like celebrating birthdays or casual Fridays. Also, leaders must work hard to manage frustrations and disagreements in a healthy, proactive way, while demanding healthy accountability.



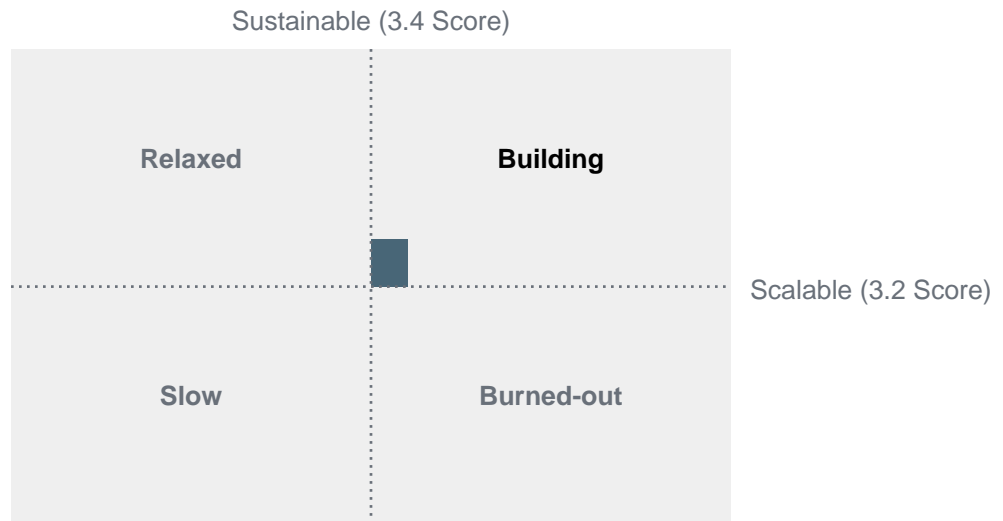
Insights and Reflections:



Pace - Sustainable and Scalable

Discerning how quickly or slowly the organization and its personnel need to move to sustain long-term success, maximize opportunities, and grow capital. The currency is time and energy.

Ryan Holmes said, "You can run a sprint or you can run a marathon but you can't sprint a marathon." This thought process clearly resonates with you and your organization. Not only have you found a sustainable pace, you have also made the necessary changes to keep growing your business into the future. Keep multiplying healthy leaders as you find better ways to live into your vision and values at the next level.



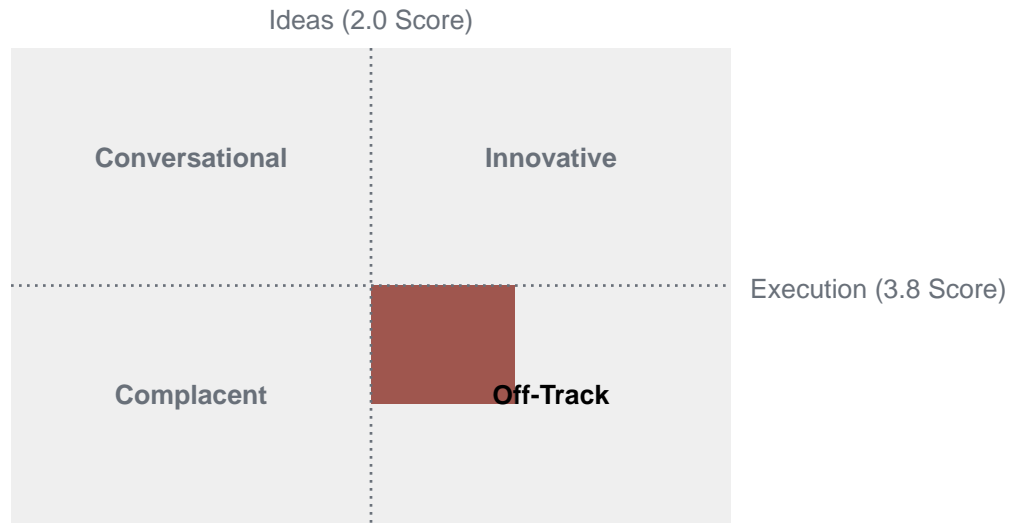
Insights and Reflections:



Perception - Ideas vs Execution

Choosing a growth mindset and staying open to creative solutions and new ideas. The currency is insight and innovation.

Your responses indicate that you are more competent in implementation than innovation. The quality of the idea is as important as making that idea happen. Is it time to raise up and release the creatives on your team? Successful organizations have both innovators and implementers. Call your innovators forward. Empower them to invest more time and energy into ensuring that your company moves toward the creative edge.



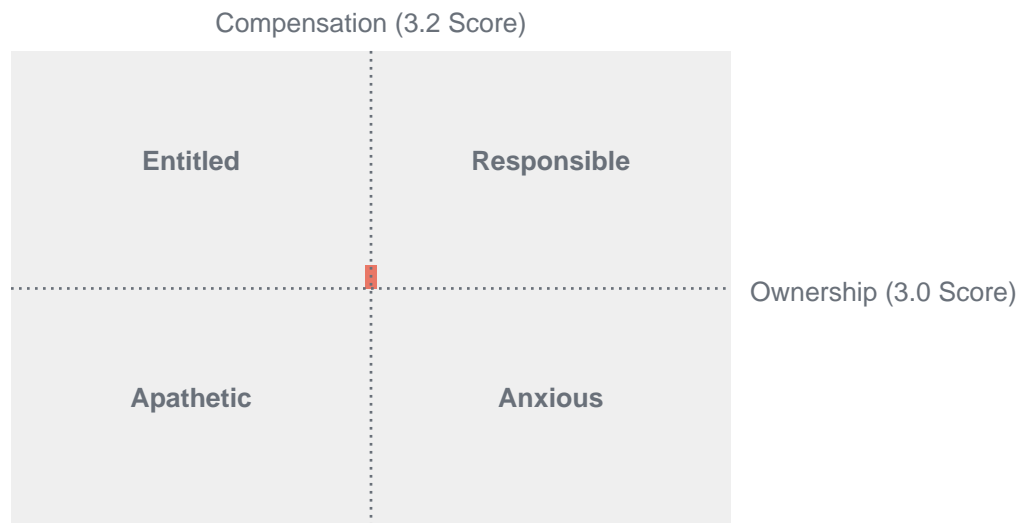
Insights and Reflections:



Profits - Compensation vs Ownership

The effective management, investment and release of an organization's resources. The currency is dollars and cents.

Congratulations! You are experiencing the power of correctly aligning the Five Priorities. When we know and live our purpose, take good care of our people, set a sustainable and positive pace, and continue to grow our innovative perception, the results are astounding. An interdependent culture sharing ownership generates higher profits. These profits fuel higher salaries, grow the talent pool and spur ongoing development. Be sure to schedule regular pit stops to fine tune your well oiled engine.



Insights and Reflections:



SUMMARIZING YOUR WORK: NEXT STEPS

Now that you've taken a look at each of the above "going deeper" sections, think about which of the low score categories would be the easiest to improve. Share these opportunities with your boss and colleagues and work them into your action plan at the bottom of this report. As things start to improve, you'll be able to come back to these results and start working on the next lowest scores.

Next Steps

These gaps (or similarities) are best processed on your own at first. Asking the questions: Do I believe these results are true? How do they resonate with what I see and experience daily as a part of the organization? Do these scores bring you clarity, and if so where?

Once you've processed these scores on your own, we recommend inviting others into the conversation. Connect with your coach, boss, colleagues or friends to talk through your results and then work to discern appropriate next steps together.

Reflect: Prepare for Action

What I want to talk about:

Who am I going to talk to:

When I am going to have the conversation:



Respond: Take Action

The steps I will take:

The people who will hold me accountable:

The outcomes I expect to see:

By when they will be completed:



Step Two: Clarify Your Action Steps

No doubt, you've written down a number of ideas and possibilities around action steps. We encourage you to reflect on all of these options and pick the top 3 that stand out the most. Write these down clearly stating when you'll start them, what success will look like and who can help you achieve this step.

MY ACTION STEPS	SUCCESS LOOKS LIKE...	WHEN I WILL START	WHO CAN HELP
1.			
2.			
3.			
4.			
5.			

Step Three: Articulate Your "WHY"

The roots of conviction sink deeper when we clearly communicate the "why" behind what we are doing (especially when making a change for the better). As you think about the changes needed for you and your company to truly thrive, consider why these changes are important. Use these "why" statements when you feel like quitting or when hardships (or curveballs) are thrown your way.

My "Why Statement" as it relates to implementing this action plan:



Step Four: Invite Others

Great plans often fail due to a lack of community and encouragement to strengthen our will and determination. We all need champions in our lives, people who know us well and fight for our highest possible good. These individuals bring support and challenge; and even when they offer critique, we know they are for us.

People of Potential:

- Are genuinely and authentically interested in you.
- Are willing to serve and help you in some way.
- Are generous - gladly opening up their network of friends and resources to you.

We say: "stick with your people of potential".

Who are your champions? Write down any names who come to mind, plan to reach out to them, asking if they would be willing to help you grow forward.

PEOPLE OF POTENTIAL	WHEN I WILL TALK TO THEM	WHAT I WILL SAY
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

Congratulations!

Frank, you have worked through your report complete with an action plan you can start implementing right away. If you would like to read more about the Five Priorities concept, engage in our online training platform or connect with a coach. Consider the "engage with us" section below.