



## **GROUP SUMMARY Mini-Survey Report**

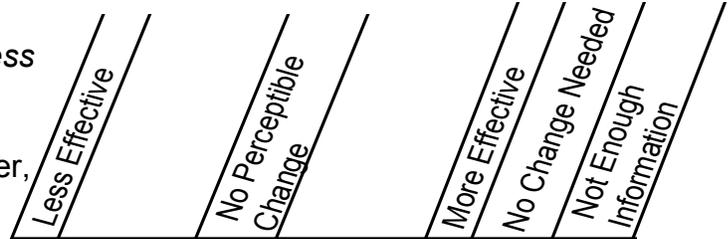
**For**

**Jack Clarkson and Team**



Do you believe [this person] has become more (or less) effective *since the start of this coaching process* on these leadership skills?

**Report Codes are as follows: S=Self, M=Manager, TM=Team Member/Colleague.**



**TEAM GOAL (aggregate)**

			-3	-2	-1	0	+1	+2	+3		
MS#1	Collaborates more effectively	TM				2	4	15	8	6	3
		M					3	3			
		S					2	5			

**PERSONAL GOAL (aggregate)**

MS#1	Summary of personal goals	TM					11	8	6	2	10
		M				2		4			
		S					3	1	2		

**Response and Follow-Up**

Has [this person] talked with you about her/his stated goals?	<b>YES = 6S, 4M, 26TM</b>	<b>NO = S, 2M, 9TM</b>
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To what extent has [this person] followed-up with you on the areas that she has committed to improve?	<b>5TM, 1M</b>	No Perceptible Follow-Up
	<b>1M, 2S, 12TM</b>	Little Follow-Up
	<b>5S, 2M, 9TM</b>	Some Follow-Up
	<b>6TM, 1M</b>	Consistent (Periodic) Follow-Up

**Additional comments/suggestions for [this person]'s consideration ...**

What specifically has [this person] done to improve that you want to acknowledge and reinforce?

**Manager CFO**

- Does a good job anticipating issues / other people's needs.
- Does a great job anticipating schedule and needs.
- Follows up on assignments quicker and takes time to explain approach.
- Frequently reminds when appointments change or are early in the day and might overlap with travel times.
- Has been easier to contact / quicker to respond.
- Has made efforts to improve information sharing.

- Is able to more clearly summarize info and state own view.
- Is coming to me with issues more frequently and more timely.
- My conversations with [] have become more candid and trusting.
- Recently we have had candid conversations on sensitive topics and [] spoke openly with me about concerns.
- Seeks other people's opinions more often to get a broader view
- Seems more comfortable delegating work.

### **TM (team members)**

- Acknowledges when not sure or was incorrect about a topic
- Always has an open door and is makes self available when needed
- Asks questions to make sure we both are on the same page
- At our last department meeting, [] stood and used visuals for part of presentation. This was a great idea and made presentation more engaging.
- Clarifies own opinion and makes them constructive and less critical
- Has addressed individual team members on career tracking, areas for improvement, etc.
- Has always been collaborative, not sure has been more collaborative
- Has been a better listener
- Has been keeping Dean inform[ed] of urgent matters that come so he's not blind sided
- Has been more direct, and provided better context regarding actions and requests
- Has come to my office to talk about cost efficiency ideas.
- Has dealt with performance problems by eliminating an underperformer even if it's not that prevalent in our culture.
- Has improved in self-awareness and making noticeable efforts in this department.
- Has made even more of an effort to develop team through a new Business Review process, having them be coached on public speaking, etc.
- Has noticeably shared information more proactively.
- Helps me understand a topic when I have questions or I'm not clear
- I am aware of a performance issue that [] tackled very quickly
- I did not see this as an area needing improvement before this exercise, but I have noticed that when there is something stressful/serious going on and s/he is short with me or has to cancel a meeting, s/he explains why and always follows up after the "fire drill" is over. This helps me understand that s/he takes my needs/concerns seriously and is just prioritizing something else that needed to be addressed immediately.
- I don't have enough information about [personal] goal to comment.
- I have noticed a change in conversations about people and issues being more positive.
- I've noticed in meetings s/he speaks up and communicates effectively
- Improved on letting me know when s/he's going to be out of the office
- Is always very helpful and tries [the] best to accommodates all the employees' needs in regard to workspace
- Is approachable and easy to speak with
- Is asking questions and bringing up ideas and possibility on any area that interact.
- Is better at respecting the times of meetings
- Is consistently working on Collaboration on many projects.
- Is great at coming up w/different ideas to improve some areas in the building

- Is great at keeping me inform[ed] of when s/he'll be out of the office
- Is required to collaborate and continues to do so; continues to perform well in this regard
- Is very attentive about what [manager's] expectations are
- Is very communicative on []'s schedule. Is very proactive in updates and requests.
- Is very good at proactively communicating status of things
- Knew that our company Travel function affects my group. Offered to have me present the next time our vendor is here to facilitate discussion and sharing of information with them.
- Let an employee move to my department when it was a good decision for the employee and the company. You can't get much more collaborative than that!
- Makes a concerted effort to voice own understanding of my personal and professional preferences
- Meets w/peers to understand the work/business
- Now proactively sends emails to notify us of potential calendar conflicts with [].
- Often provides a heads up on what s/he thinks may impact my team.
- Often reaches out to me to discuss some projects and get my thoughts on if I may be impacted.
- Prior to this exercise, I have needed []'s help in gathering data for a project I was working on. S/He was very helpful, offering suggestions and the assistance of team that had the needed expertise.
- Proactively reaches out to my team to share tasks that may require our input. We collaboratively define a deadline and desired outcome.
- Proactively set up a 1:1 meeting with me to discuss own role and to get to know my role better.
- Quickly responds to emails and returns calls
- Schedules regular departmental meetings and makes a point to have the team all share any important initiatives or projects they are working on. This helps us all stay in tune with what the team is doing and provides awareness of issues that may impact others on the team.
- The nature of []'s job restricts what can be shared with us. I feel that s/he does collaborate and share information whenever it's appropriate and relevant to our functions.
- Tries her best to present own point of view
- We scheduled time together to educate each other about our job functions. It was very informative and I now have a better understanding of [the other] annual process. While I don't think that function will intersect with mine in the near future, I do feel better informed about what [that] group does and appreciate that.
- We share information fairly regularly. [] brings issues to my attention when they impact my function.
- We stop to share brief comments or information in the hallway occasionally, which we did not before our meeting. This has helped me feel I could stop by anytime if I do have something I need to share with [person].
- While we haven't had a chance to meet 1:1 to collaborate, we occasionally pass in the hall and chat. S/He's always open to discussion. Our job functions just don't overlap very often.
- Works diligently w/the Executives to make sure s/he meets her deadlines

**What suggestions (feedforward) can you provide to [this person] moving forward to improve even more?**

**Manager**

- Address performance issues in your team sooner.



- Be careful not to make too many assumptions in your work (example: assuming a decision has been made when it hasn't)
- Tell people about your [personal] goals. Ask if they have noticed a change.
- Be available at your desk phone more often ... or forward your office phone to your cell phone.
- Despite improvements in this area, you should improve information sharing.
- Occasionally, oversteps decision authority. Please elevate issues sooner and more often.
- Anticipate other people's questions and prepare answers in advance.
- Keep improving your ability to delegate work to others.

### TM

- Be cognizant of tone and directness in email. Magnitude of intended tone may be interpreted differently than intended.
- Be conscious of email tone, sometimes it may be misunderstood
- Can be more effective if s/he delegates more.
- Continue doing a good job at being on time at meetings
- Continue presenting own point of view
- Continue to anticipate time conflicts and proactively look for solutions.
- Continue to consider when changes and issues affect me and set up time to discuss. I.E. [examples].
- Continue to keep me informed when changes are made to Travel Leaders functionality.
- Continue to reach out to Executives and peers to understand what is needed or what the expectations are
- Continue what you're doing and stop by anytime to share information.
- Elaborate on some answers with explanations vs. short emails.
- Focus on underperformers that are here to stay. Do not be hesitant to address areas of improvement, particularly with those individuals that have been here for a long time and seemingly will not change.
- Has many great ideas and suggestions. Often, the idea for a given analysis may change significantly from one mtg to the next, making it difficult to meet expectations. It may help if the expectations are clearly written to avoid any misinterpretations.
- I don't have enough information to comment on [person's] goal.
- If not already doing it, giving analysts more specific feedback on what and how to improve current processes and reporting.
- Most of [] direct reports do not get enough development and coaching from [].
- No change needed
- Please reach out if you have questions or want to share any relevant information.
- Please reach out to the Controller and share his thoughts on how to drive efficiencies for the facility. The water cooler decision did not include the Controller office.
- Reply to emails and phone calls in a timely manner
- Should continue to reach out to stakeholders that may be impacted on what s/he is currently working on to ensure we understand the impact.
- Should establish Service Level Agreements for tasks assigned to the team. Sometimes, I often avoid going to [] because I know s/he will not be able to provide the SLA I am seeking.
- Try different ways to hold executives accountable if you are not getting results.
- When we meet in our 1:1's, you could point out opportunities where we could benefit by sharing information with others on our team. I am trying to work on this goal myself, but may not always have awareness when my issues/projects will impact others on the team.

**Is there any other information you would like [this person] to consider?**

**Manager**

- Ask people if they are noticing your changes.
- Ask people if they have noticed your changes.
- Ask people if they've noticed your changes.
- Do more follow-up – ask if people are noticing your changes.
- Thank you.

**TM**

- Consider the benefit of the doubt when approaching issues, listen before reacting
- Has committed to be a more effective leader. I like that to continue.
- Is an effective boss and leader. I enjoy being part of the team.
- n/a
- n/a
- Please take opportunities to share your projects to the [] team.
- Possible idea for times when you aren't getting responses or results: Set expectations upfront and timeline deadlines on calendar and ask for mutual agreement from the team in a group setting. This is to enforce accountability.
- Possible idea: asking each team member to come up with ideas on how to improve reporting and current practices.
- Possible idea: Having a group meeting of higher expectations from above, so [] feedback is not personalized to one person. Convey the message that the team is expected to perform better as a whole from executives, etc.?
- Unfortunately, I don't report to [] so I'm not sure if [goal is being met]
- Unfortunately, I'm not in meetings w/[] so I don't know if s/he gives more effective presentations