The SHL Leadership Report

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Contents

1 Purpose of the User Guide

The purpose of this User Guide is to support you, the Occupational Personality Questionnaire (OPQ) trained user, in the interpretation and practical application of the SHL Leadership Report and to help you get the most out of the information available to you.

If you are already familiar with the SHL Leadership Report, you may find it beneficial to use the contents page to direct you to the section of most interest to you. For instance, each of the four case studies included give practical examples of how the SHL Leadership Report has been used to 1. inform a selection decision 2. support individual development 3. support organisational development 4.for team development.

However if you are completely new to the SHL Leadership Report, you may find that reading through this guide will not only help you to understand the theoretical foundations of the report but also the different context in which it may be practically applied.

2 How can the SHL Leadership Report be used?

The SHL Leadership Report is a report designed for OPQ trained users to apply in selection, team building and individual and organisational development situations. The Report uses the comprehensive SHL Corporate Leadership model to provide an objective assessment of leadership attributes. This holistic approach provides relevant and practical information about leadership capabilities in an organisation. It has been designed for the early identification of leadership talent and is an ideal aid in the establishment of talent pools for development and succession planning purposes.

In a **selection context,** this information can be used:
- to identify potential areas of strength and development in line with the individual's preferences and tendencies that may impact on their performance.
- for making interviewers aware of the areas that may need further probing.
- as a basis for suggesting and creating relevant interview questions.
- to indicate the level of 'fit' between the individual's preferences and tendencies and the requirements of the role (e.g. transactional versus transformational focus).

In a **development context**, this information can be used:
- to identify potential areas of strength and development need in line with the individual's preferences and tendencies in relation to each of the leadership functions that may impact on their performance.
- to identify areas of strength and development on each of the leadership functions in terms of future leadership potential.
- as the basis for identifying focus areas for development and development planning.
- for discussing fit to future roles and career planning (succession planning).

In a **team building context,** this information can be used:
- to identify common areas of potential strength and development within teams that may impact on their current and future team performance.
- as a basis for identifying common areas for development when considering team training and development needs.
- to identify potential 'gaps' within a team which should be taken into account when setting criteria for future selection activities.

- for a shared understanding within a team of colleagues' preferences and tendencies in order to promote harmonious team working behaviours.

3   What models is the SHL Leadership Report based on?

SHL has a robust, scientific and business-relevant Corporate Leadership model that enables clients to define what kind of leaders are required in their business. Our model enables clients to identify leaders (internally or externally), to focus their development and to track their progress over time. It also allows everyone to understand what is required in a leader: allowing open dialogue, honest feedback and clarity on how to be a better leader in a given organisation.

The Leadership Report uses the SHL Corporate Leadership Model, this was derived from the generic model of the world of work described in Bartram, Robertson and Callinan (2002) and Kurz and Bartram (2002), and differentiates between the widely accepted and regarded **transactional** and **transformational** leadership styles, to provide an accurate assessment of the individual's approach to leadership.

> *Key Point*
> *Leadership is about influencing people such that they come to share common goals, values and attitudes, and work more effectively towards the achievement of the organisation's vision.*
>
> *An effective leader is one who makes a demonstrable impact on one or more of these criteria in a positive way by influencing the behaviour and performance of others (Bartram, D. 2002).*

Management is about keeping an existing system running effectively and efficiently (transactional leadership), whereas leadership is about creating it, developing it or changing its direction (transformational leadership). Confusion is sometimes generated by the fact that it is difficult to conceive of a person who has leadership skills without that same person also having management skills. While they may be conceptually distinct, they are in practice found side by side (Bartram, D., 2002). For that reason, the SHL Corporate Leadership Model considers, and hence the Leadership Report assesses, both.

The SHL Leadership Model covers four leadership functions critical to leadership effectiveness in any organisation. Each of these functions can be considered in terms of a management (transactional) focus and a leadership (transformational) focus. Each function has its characteristic types of behaviour:

1. **Developing the Vision**: the strategy domain
2. **Sharing the Goals**: the communication domain
3. **Gaining Support**: the people domain
4. **Delivering Success**: the operational domain

In line with the Leadership Model, the Leadership Report builds a detailed profile of an individual's personal style and their leadership potential. It provides an in depth understanding of the individual's preferred style across the four leadership functions listed above. The Leadership Report allows organisations to capture management skills

(transacting) and leadership skills (transforming) in their potential leaders. Each leadership function is associated with two competencies, based on the SHL Universal Competency Framework (UCF) Great 8 Competency Factors: one which is transformational and one which is transactional in focus (see Figure 3.1 below). Research has shown that these eight factors not only provide a parsimonious but complete account of work behaviours, but they have also been consistently shown to effectively predict successful leadership behaviour. For further information regarding the theoretical basis of the SHL Corporate Leadership Model please refer to the SHL White Paper on the SHL Corporate Leadership Model.

Figure 3.1. The SHL Leadership Model detailing the four functions and their related management and leadership focused competencies.

Leadership Function	Definition	Competencies	
		Management Focus (Transactional)	Leadership Focus (Transformational)
Developing the Vision	This involves the critical analysis of the current situation, and the generation of ideas to move forward (Strategy).	**Analysing & Interpreting** *Analysing complex information and applying expertise.*	**Creating & Conceptualising** *Producing innovative ideas and thinking strategically.*
Sharing the Goals	This involves persuasively communicating the vision to others, as well as personally adapting to the changes that the new strategy brings (Communication).	**Adapting & Coping** *Responding and adapting well to change and pressure.*	**Interacting & Presenting** *Communicating with, persuading and influencing others.*
Gaining Support	This involves gaining other people's support by motivating and empowering them to implement the actions needed to deliver the strategy (People).	**Supporting & Co-operating** *Supporting others and working effectively with people.*	**Leading & Deciding** *Initiating action, giving direction and taking responsibility.*
Delivering Success	This involves using operational efficiency and commercial acumen to effectively implement the strategy (Operations).	**Organising & Executing** *Planning, working in an organised manner and focusing on delivery.*	**Enterprising & Performing** *Focusing on results and on achieving goals.*

The Leadership Report gives an indication of the individual's likely leadership style for each leadership function and its related competencies and aids interpretation by providing illustrative examples of situations that may bring out the best in individuals and situations that they may find more challenging.

Many organisations share similar concerns around 'leadership', for example:

- There is no clear or consistent view on what we need from the leaders/managers in our business.
- We need a common language in our business to define what we mean by leadership.
- We don't have a useful framework to assess leadership potential against.

> **Key Point**
> *In response to the above the SHL Leadership Model has been developed over years of research and working with many different clients in different industries and sectors. As such it is a robust, and scientifically tested business-relevant Leadership model that enables organisations to define what kind of leaders are required to enable their business to succeed. It spans all levels of management and leadership.*

4 How can you encourage your Organisation to buy into using the SHL Leadership Report?

It can often be a challenge to convince organisations to invest in 'leadership' as it is not a particularly tangible concept and can mean different things to different people both within and across organisations. Therefore it is imperative at the outset of any leadership initiative (be it for selection, development or team building purposes) that the importance of accurately measuring leadership behaviour is widely understood and accepted at an organisational level. It is widely appreciated that nurturing future leadership potential is key to organisational success, be it through selection, development or team building initiatives but it must be based on accurate diagnosis. This is where the Leadership Report is able to add significant value.

There are many benefits of using the Leadership Report in each of these scenarios:
- ✓ It is based on a comprehensive and well researched model.
- ✓ It is a proven and robust method for the identification of leadership potential.
- ✓ It has been externally validated and benchmarked (locally and internationally).
- ✓ It can be implemented quickly and easily (on an SHL On Demand system or through the Bureau service).
- ✓ It is a cost-efficient & effective solution.
- ✓ It can be applied in order to aggregate team preferences.

Organisations often share the following similar issues which may be capitalised upon when convincing others to buy into using the Leadership Report:

- We can't continue to rely on 'buying-in' our leaders - it's **too expensive** and it takes too long to get them up to speed".
- We need to be better at **recognising who has the potential** to be a leader in our organisation - this applies to both our recruitment and development activity.

> **Key Point**
> *The SHL Leadership Report enables you to identify your future leaders (internally or externally) by assessing them against your current leadership and business requirements.*

- Our leaders have been promoted into their positions without much thought given to how they are going to handle their new responsibilities. Where do we start?
- We are losing our 'rising stars'.
- Our leaders are clearly lacking in some areas (e.g. soft skills, strategic planning, communication, motivating their teams, setting direction etc.). How do we best focus our development efforts?

> **Key Point**
> By using the Leadership Report you are able to highlight an individual's areas of strength and development, you are able to focus the development of your current leaders and to track their developmental progress over time.

- Our leadership team has gone through a lot of change and turnover. We need to regroup and understand our strengths.
- We need to understand how to work better together as a leadership team.
- We have a clear direction in our business. But how capable is our leadership team of driving and executing the strategy?

> **Key Point**
> The SHL Leadership Report really comes alive when you start to aggregate the leadership team results. It allows you to spot gaps in the team and identify themes that could inhibit your leadership team performing effectively. It is invaluable in helping you to identify team development needs and unlocking its potential.

In addition to communicating the above there is nothing more powerful when convincing others to see the benefits of the Leadership Report than asking them to complete it for themselves. Some key tactics include:

- Invite key individuals to complete the Leadership Report and receive one to one feedback with an OPQ trained individual.
- Design and deliver a facilitated workshop with the Senior Leadership team following the generation of reports.
- Conduct a pilot study on a small sample of individuals within the target group.

5   How do you feed back the SHL Leadership Report to an Individual?

To use the report appropriately and effectively, we strongly recommend you follow the three-step process outlined below.

- Decide how you wish to apply the Report
- Interpret the Report
- Conduct an interview or provide feedback

5.1 Decide how you wish to apply the Report

Before you start using the report the first questions must be 'why am I using the report?' and 'what do I intend to use the output for?'.

The way in which you interpret and feed back the report will differ slightly depending on whether you are using it within a selection, development or team building context.

Selection context
Here it is important to identify which of the 'Great 8' competencies are most relevant to the role in question. Does the role have more of a transactional or transformational focus on each of the leadership functions? When using the Leadership Report for selection purposes, it is important to first understand what a desirable profile would look like in terms of the leadership preferences and tendencies that you are ideally looking to recruit.

This can be done by gathering information, such as existing job descriptions and documentation about the role or talking with people who have good visibility of the role and a good understanding of the core objectives and role requirements.

Development context
First you need to identify what the purpose of the development activity is.

- If the purpose is to address performance issues in an individual's current role, seek to understand what competencies are relevant to the role and what the key areas of concern are.
- If the purpose is to help the individual develop towards more senior roles (including succession planning activities), seek to understand which competencies may be relevant for the more senior roles so that you can establish where the development gaps are likely to be in relation to each of the leadership functions. You can also discuss this when you meet with the individual, as they will have a view on which roles they would like to develop towards. You can then focus the discussion with the individual on these areas of the report.

Team building context

Again first seek to identify the purpose of the activity.

- If the purpose is to investigate and address team performance issues seek to understand what competencies are relevant to the team and what the key areas of concern are.
- If the purpose is to help teams to regroup and work together more effectively, and develop a greater understanding of strengths and development areas of self and others in relation to each of the leadership functions, understand what an ideal 'spread' of scores for the team across the Nine Box Model would look like (e.g. what is the benefit of having a spread of styles within a leadership team? is there a predominant style that would benefit the team?).
- If the purpose is to identify common areas of strength and development in order to initiate team development activities, again seek to understand what competencies are relevant to the team and what the key areas of concern are.

5.2 Interpreting the Report

There are four sections in the Report and it is recommended that you refer to each of them in turn:

- Introduction
- Executive Summary
- Leadership Potential Detail
- Leadership Potential Summary.

Introduction
First, read through this section of the output report in order to familiarise yourself with the background to the report and the SHL Corporate Leadership Model on which it is based.

Executive Summary
This section provides a summary of the layout of the report and an 'at a glance' top level view of the individual's style overall and their potential on each of the four leadership functions. An example is provided in Figure 5.2.1.

> **Key Point**
> *Remember, this information is generated from the individual's OPQ responses.*

Figure 5.2.1. Example of an individual executive summary of responses against management versus leadership focus and the four functions.

Leadership Function	Transactional	Less	More	Transformational	Less	More	Preferred Leadership Style
OVERALL	**MANAGEMENT** *Delivering dependable performance and reaching operative objectives.*			**LEADERSHIP** *Inspiring both people and the organisation to become proactive and to achieve beyond expectations.*			**Manager**
Developing the Vision	**Analysing & Interpreting** *Analysing complex information and applying expertise.*			**Creating & Conceptualising** *Producing innovative ideas and thinking strategically.*			**Balanced Mix of Creating and Analysing**
Sharing the Goals	**Adapting & Coping** *Responding and adapting well to change and pressure.*			**Interacting & Presenting** *Communicating with, persuading and influencing others.*			**Adjuster**
Gaining Support	**Supporting & Co-operating** *Supporting others and working effectively with people.*			**Leading & Deciding** *Initiating action, giving direction and taking responsibility.*			**People Leader/Team Player**
Delivering Success	**Organising & Executing** *Planning, working in an organised manner and focusing on delivery.*			**Enterprising & Performing** *Focusing on results and on achieving goals.*			**Idealist/ Implementer**

Key to competency symbols

This is a more preferred style, competency more likely to be a strength.

This is a moderately preferred style, competency may be a moderate strength.

This is a less preferred style, competency less likely to be a strength.
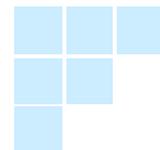
Leadership Potential Detail section

This section provides further detail on the individual's preferred leadership style overall (management versus leadership) and against each of the four functions. The initial management versus leadership focus and each of the four functions are broken down into two levels of detail.

First you are presented with the candidate's position within a Nine Box Model. This is presented both graphically and in text format. The text describes behaviours which are *typical* of the individual's preferred leadership style in terms of where they are positioned within the nine box grid. The text goes on to describe examples of situations

that individuals who display this style typically find themselves at their best in and situations they may find more challenging. It is important to note here that the description of the preferred leadership style and the At Their Best / May Find Challenging text is automatically generated on the basis of the individual's outcome style overall and not their specific results on individual OPQ dimensions. Therefore as an example, all individuals falling within the Conservator box in relation to the **Developing The Vision** function will have the same output text generated for their At their Best / May Find Challenging output regardless of any differences in their individual OPQ dimension results.
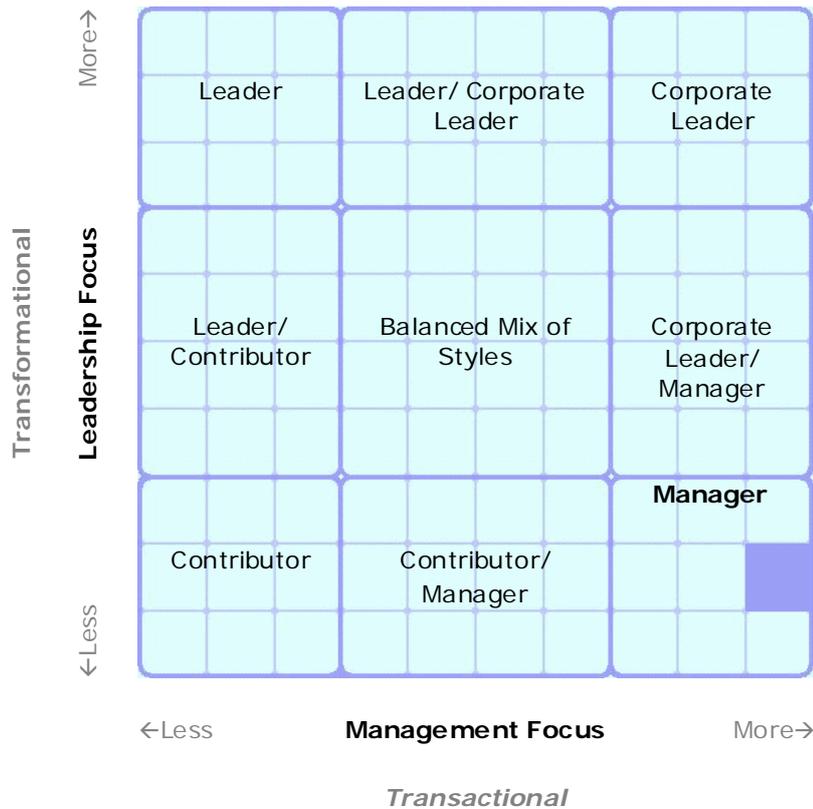
> *Key Point*
> *The narrative text is based on the individual's preferred leadership style for a given leadership function. It reflects typical behaviours/situations for that style. Use the information on the individual's specific behavioural preferences from the OPQ dimensions to drive further interpretation and understanding of how this applies to the individual.*

The graphic shows the transactional (management) focus or competency on the horizontal axis and the transformational (leadership) focus or competency on the vertical axis for each function. The individual's preferred style is plotted and indicated by a coloured square on the grid, with the relevant leadership style title shown in bold. See Figure 5.2.2 below for an example. In this example, the individual's preferred style is "Manager". When using this report for selection or succession planning purposes, you should have some knowledge of the 'preferred style(s)' most appropriate for the role that the individual is aiming for. This allows you to compare their preferred style with the style most appropriate for the role.

Be mindful that as the report is based on the individual's personality profile, with targeted development activities it may be possible to move the individual's behaviour away from their current natural style to some degree (for example moving 2-4 small boxes within the grid), however it may not be possible even with development to change their behaviour drastically (for example flipping from bottom left corner to top right within the grid). The possibility of such 'style stretch' should be discussed with the individual during feedback. Please note, it is not always the case that the role in questioned has been profiled against the SHL Leadership model prior to interpreting the Leadership Report. In this case your role is to use the report to guide your thinking in terms of questions to ask during feedback/interview in order to probe areas of strength and potential development in further detail.

Figure 5.2.2. Example 9 box model detailing Overall Management Versus Leadership Focus.

	Leader	Leader/ Corporate Leader	Corporate Leader
	Leader/ Contributor	Balanced Mix of Styles	Corporate Leader/ Manager
	Contributor	Contributor/ Manager	**Manager**

Transformational — **Leadership Focus** (More→ / ←Less)

←Less **Management Focus** More→

Transactional

The second element of detail for each function following the Nine Box Model grid within the Leadership Report is the OPQ dimensions relating to each function (**Developing the Vision**; **Sharing the Goals**; **Gaining Support** and **Delivering Success**) or for the overall focus (**Management Versus Leadership**) the Great 8 competencies. The purpose of the dimensions is for the OPQ trained user to add richness to the generic textual feedback on the previous page (described above). See Figure 5.2.3 for an example OPQ dimension output relating to the Developing the Vision function.

> **Key Point**
> *Review the OPQ dimensions relating to the function being considered and discuss these with the individual to explore what this might look like for them, as an individual, during the feedback session. This conversation will be similar to that of a typical OPQ validation interview.*

Depending on how you are intending to use the report, this detailed information can help you to:

✓ Identify areas to be probed further during the feedback session (if for development purposes) or at interview (if for selection purposes).
✓ Prepare interview questions around the competencies relevant to the role.
✓ Identify key areas of strength and of development, and start to consider potential development activities.

Figure 5.2.3. Example OPQ dimension output for Developing the Vision

Developing the Vision

Transactional Focus											
Analysing & Interpreting		1	2	3	4	5	6	7	8	9	10
Applies practical thinking to the resolution of problems. Less inclined towards quantitative analysis, more likely to follow intuition.	7											Shows evidence of clear analytical thinking. Gets to the heart of complex problems and issues. Applies own expertise effectively and quickly takes on new technology. May be inclined to over analyse a situation.

Related OPQ scales are:		1	2	3	4	5	6	7	8	9	10	
prefers dealing with opinions and feelings rather than facts and figures, likely to avoid using statistics	9	**Data Rational** • • • • • • • — | — •										likes working with numbers, enjoys analysing statistical information, bases decisions on facts and figures
does not focus on potential limitations, dislikes critically analysing information, rarely looks for errors or mistakes	3	**Evaluative** • — | — • • • • • •										critically evaluates information, looks for potential limitations, focuses upon errors
prefers to deal with practical rather than theoretical issues, dislikes dealing with abstract concepts	6	**Conceptual**[1] • • • • — | — • • •										interested in theories, enjoys discussing abstract concepts

Transformational Focus											
Creating & Conceptualising		1	2	3	4	5	6	7	8	9	10
Works most effectively in situations requiring the application of established methods and ways of working. Tends to apply tried and tested approaches to the resolution of problems. Upholds the status quo.	4											Works well in situations requiring openness to new ideas and experiences. Seeks out learning opportunities. Handles situations and problems with innovation and creativity. Supports and drives organisational change. May overlook positive aspects of the status quo.

Related OPQ scales are:		1	2	3	4	5	6	7	8	9	10	
more likely to build on than generate ideas, less inclined to be creative and inventive	4	**Innovative** • • — | — • • • • •										generates new ideas, enjoys being creative, thinks of original solutions
prefers to deal with practical rather than theoretical issues, dislikes dealing with abstract concepts	6	**Conceptual**[1] • • • • — | — • • •										interested in theories, enjoys discussing abstract concepts
more likely to focus upon immediate than long-term issues, less likely to take a strategic perspective	5	**Forward Thinking** • • • — | — • • • •										takes a long-term view, sets goals for the future, more likely to take a strategic perspective
favours changes to work methods, prefers new approaches, less conventional	7	*Conventional* * • • • • • — | — • •										prefers well established methods, favours a more conventional approach

[1]The Conceptual dimension is relevant to both "Analysing and Interpreting" (e.g. applying theories to solve complex issues or develop expertise) and "Creating and Conceptualising" (e.g. using theories to develop new ideas/innovation).

* Dimensions marked with an asterisk are treated differently to the other dimensions. For these dimensions only, a left hand side preference (lower sten) is preferable for this competency and contributes more to the overall competency potential sten. A right hand side preference (higher score) is less preferable and contributes less to the overall competency potential sten.

Leadership Potential Summary Section

Featured at the back of the Report, this section is designed to be given directly to the individual who completed the OPQ, ideally as part of a feedback session. This section begins by summarising the individual's preferred styles for each function and is followed by one page per function which details the Nine Box Model and the automatically generated textual information relating to their preferred style. There is also a section for the individual to make notes throughout the feedback session.

> **Key Point**
> *The leadership potential summary section DOES NOT contain data on the OPQ dimensions as this would not be meaningful information for the individual if they are not themselves OPQ trained.*

5.3   Conduct an Interview or Provide Feedback

You may be conducting an interview with the individual(s) who completed the OPQ as part of the assessment process. This user guide is not intended to provide detailed guidance on conducting interviews or feedback sessions. If you would like further information or training in interview techniques, please seek guidance from someone within your organisation who has experience in this area or contact SHL. We have a range of best practice guidelines and accredited training courses to meet your needs.

Alternatively you may be providing feedback either directly to the individual who completed the OPQ (in the context of assessment or development) or to their line manager/interview panel who will then be conducting an interview with the individual.

Giving feedback on the Leadership Report within selection and development contexts will typically be a one to one situation between yourself and the individual.

Feedback as part of a team building exercise can also involve one to one feedback but also amalgamated group feedback as part of a structured workshop. When feeding back outputs to the team as a whole, it is useful to produce power point slides which detail the team spread of scores across the Nine Box Models for each function. This can be used to generate discussions around how the team works together and identify any potential common areas of strength and development.

> **Key Point**
> *Prior to the workshop, a decision will need to be made as to whether it would be appropriate to show individual names against scores or kept anonymous in order to demonstrate the spread of scores.*
>
> *From a team perspective, it can sometimes be distracting to link outputs to individuals directly. That said, it is useful to share individual style outputs in some occasions, as where a team is being encouraged to appreciate the different styles of others in order to nurture more effective team working behaviours.*

An outline for structuring a developmental feedback session to an individual is provided on next page. You will need to modify this structure as appropriate, depending on the context in which you are providing feedback.

Step	Details
1. Introduce the feedback session	• Introduce yourself • Ask the individual their expectations of the feedback session and set clear expectations with them • Explain and agree the process/agenda/timings for the feedback session
2. Introduce the report	• Emphasise that the report has been generated from their responses to the OPQ questionnaire. • Explain briefly the SHL leadership model that the Leadership Report is based upon (the 4 functions; each with a transactional and transformational focus forming the 'Great 8') • Outline confidentiality and how the results will be used
3. Start with overall summary page over-viewing the individual's style over all and on each of the four leadership functions	• In a selection context, focus only on those competencies most key to the role in question (e.g. more of a transformational or transactional focus on each function?) • In a development context, confirm with the individual the functions/competencies to focus on during the session (e.g. those relevant to current or future roles). Ideally and where appropriate, the functions/competencies to focus on will have been agreed before the session so that sufficient time can be allocated to agreeing a SMART development plan (Specific, Measurable, Achievable, Relevant and Time bound) • In a team building context ask individuals to reflect on their own summary page and then if appropriate share the amalgamated team results. • Share the executive summary page with the individual.
4. Work through the report function by function	• Hand the candidate section of the report to the individual (if appropriate, otherwise hand out this section at the end of the feedback session for them to take away and reflect upon at their leisure). • Begin by discussing their style overall in terms of leadership versus management focus, followed by their style in relation to each of the four functions. • Encourage the individual to ask questions and take notes throughout should they wish.
5. Structure the feedback	• Start by indicating the position of the individual within the 9 box model (as shown by the coloured square). • Then ask the individual to reflect on the definition of their indicated preferred style. • Begin the feedback by discussing the '……are at their best' scenarios • Moving on to the '…may find challenging' scenarios. In line with best practice, ensure the feedback ends on a positive note for each section in order to engage and motivate the individual receiving the feedback.
6. Drill down in	• Once the individual's preferred style has been reflected upon

	the detailed behavioural statements	and discussed in general terms, feedback the detailed OPQ output for the function being discussed. This provides detail and depth to the automated output on the previous page. • In particular when interpreting the OPQ dimension scores, explore any extreme scores or trends that may corroborate or counter the description of their preferred style. Also think about how their OPQ preferences might impact on their leadership behaviour in relation to each function. For example in relation to 'Developing the Vision': *"Your profile indicates a definite preference for focusing on short term rather than strategic issues. How does this influence your approach to developing a new vision or strategy?"* • Ask questions to gain further evidence • Gain examples from the respondent
7.	Summarise once you have reviewed all of the functions	• Agree on the points raised in the discussion • Agree any development actions if appropriate (encourage the individual to summarise their actions for you to check understanding and encourage ownership of the actions).

When providing feedback to an individual, they are likely to ask questions in relation to their profile. Some frequently asked candidate questions are listed below with suggested responses.

Q) Can I see my OPQ profile?
Explain that the profile information should only be used by OPQ trained users and that it is being used by yourself to guide the feedback conversation. State that as part of their feedback session, you will be feeding back their OPQ profile verbally, linking the information where appropriate.

Q) What style is the best to have? Is that a bad profile?
Explain that there is no 'right or wrong' when it comes to personality as it reflects your natural preferences and tendencies – which are different for different people. However, some behaviour may be more appropriate in some contexts than others and some preferences may aid behaviours related to the Great 8 competencies and other preferences may hinder these behaviours. Explain that with some targeted development, it is possible to overcome certain tendencies and preferences to a degree but that is dependent on the degree of 'style stretch' required (as discussed previously). If within a selection or succession context, it may well be the case that you have an 'ideal' profile for the role being assessed, but depending on when the feedback is delivered (before or after selection decisions have been made) it may or may not be appropriate to share this information at this stage.

Q) Are high scores (on the OPQ) better?
As with any OPQ feedback, explain that it depends on the competencies that are being assessed as to whether a high, average or a low score is most preferable.

6   Case Studies

Below are a number of example situations detailing the practical application of the SHL Leadership Report in different contexts.

6.1   Case Study 1: Using the SHL Leadership Report to inform a Selection Decision

Context

Organisation X needed to recruit a Finance Director. The HR Manager who was the OPQ trained professional involved in supporting the recruitment and selection process began the process by facilitating an initial workshop with key senior stakeholders (the members of the Senior Leadership Team) in order to identify the critical behaviours and competencies required for effective performance in the Finance Director role. The workshop also included a visionary component where the Senior Leadership Team (SLT) were asked to adopt a future focus and think about what changes the organisation and role might undergo in the next 3-5 years which could potentially impact upon the behaviours required for effective performance in the role going forward. The UCF20 competencies identified as being critical during the visionary workshop for the Finance Director role included:

- Entrepreneurial & Commercial Thinking
- Persuading & Influencing
- Formulating Strategies & Concepts
- Deciding & Initiating Action
- Analysing
- Adapting & Responding to Change

The Senior Leadership team also provided feedback on the previous role incumbent stating that:

"She was very good with numbers and was very precise in her work, working long hours to get the job done, we could definitely rely on her to achieve her objectives and produce good quality outputs. She focused heavily on profit and loss and ensured that we kept our heads above water through the recession…What she wasn't so good at was inspiring others to buy into her ideas, she tended to base her arguments on presenting the facts rather than building compelling arguments that really meant something to them…..When we recruit this time we definitely need someone who is not only technically very astute but someone who will influence and energise the organisation to get behind their ideas…we certainly have some challenging times ahead that the new recruit will have to help to guide us through, bringing people along with them as they go."

The previous job incumbent had not completed an OPQ before they left the organisation, therefore it was not possible to see their Leadership Report for reference. However the outputs from the SLT workshop indicated that they were definitely looking for someone with a more transformational focus than the previous role holder, but still with a high level of analytical ability. Following the workshop the HR Manager mapped the critical UCF20 competencies listed above to the Great 8 in order to focus attention on key aspects of the Leadership Report during the interview and decision making process. The HR Manager also went on to identify Developing the Vision, Sharing the

Goals and Gaining Support as being the key leadership functions for the Finance Director role.

Following the planning and design phase outlined above, a short-list of three candidates was drawn up by the organisation based on CV's, ability tests and initial interviews. The candidates on the short-list were invited to complete the OPQ prior to attending a panel interview with the Managing Director and the HR Director. The Managing and HR Directors used the Leadership Report to prepare for these interviews.

Using the SHL Leadership Report
As the Leadership Report was intended to provide a basis for guiding questions during the panel interview, it was important to ensure that time was built into the process for the HR Manager to feed back the candidate outputs to the panel prior to the actual interviews. Once the candidates had completed their questionnaires and the reports had been generated, the HR Manager reviewed the reports, and then met with the Managing Director and HR Director (two days prior to the panel interviews) to feed back the outputs.

When feeding back the Leadership Report output to the Directors, each candidate was considered in turn following the same process, and in line with best practice, the HR Manager emphasised that the purpose of the feedback session was to compare each candidate against the competencies and requirements for the role and to generate questions to ask at the interviews, rather than to compare candidates against each other.

Figure 6.1.1. Preferred style for each of the three candidates in terms of overall management versus leadership focus (depicted by the numbered coloured boxes).
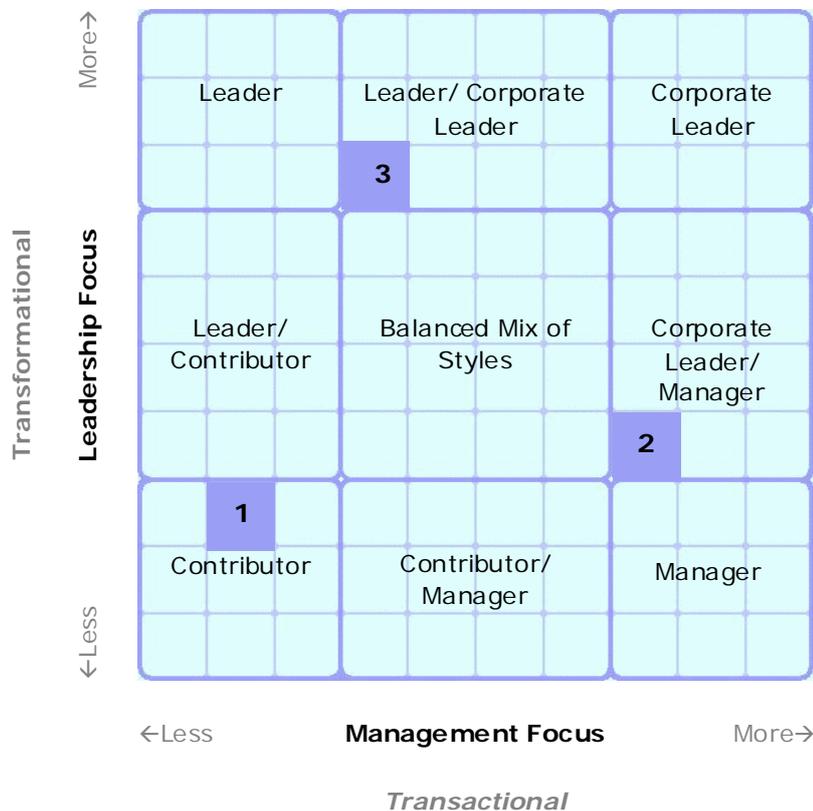
The same process was conducted for all three candidates. The HR Manager began by

explaining the structure of the Leadership Report, giving an overview of the SHL leadership model and describing the transformational versus transactional competencies that related to each of the functions. Each of the three candidates was then discussed in turn. The HR Manager talked the Directors through the executive summary and then went on to discuss each function in more detail. As the HR Manager had only been allotted 15 minutes to discuss each candidate, she planned her feedback to cover the main areas of strength and potential areas of development and business risk associated with the candidate's preferred style in relation to their overall management versus leadership style and the following four functions. The HR Manager had also planned one or two potential interview questions in relation to each function in order to guide the Directors' thinking when planning their interviews.

Figure 6.1.2. Candidate 1 Executive Summary.

Leadership Function	Transactional	Less	More	Transformational	Less	More	Preferred Leadership Style
OVERALL	**MANAGEMENT** *Delivering dependable performance and reaching operative objectives.*	▢		**LEADERSHIP** *Inspiring both people and the organisation to become proactive and to achieve beyond expectations.*	▢		**Contributor**
Developing the Vision	**Analysing & Interpreting** *Analysing complex information and applying expertise.*	▢		**Creating & Conceptualising** *Producing innovative ideas and thinking strategically.*	▢	▢	**Creator/ Conservator**
Sharing the Goals	**Adapting & Coping** *Responding and adapting well to change and pressure.*	▢		**Interacting & Presenting** *Communicating with, persuading and influencing others.*	▢	▢	**Communicator**
Gaining Support	**Supporting & Co-operating** *Supporting others and working effectively with people.*	▢	▢	**Leading & Deciding** *Initiating action, giving direction and taking responsibility.*	▢	▢	**People Leader**
Delivering Success	**Organising & Executing** *Planning, working in an organised manner and focusing on delivery.*	▢	▢	**Enterprising & Performing** *Focusing on results and on achieving goals.*	▢		**Implementer**

Immediately after glancing at the executive summary for candidate one, the Managing Director stated that he would definitely not be a suitable candidate as he did not 'score well' on either the management or leadership focus (the overall management versus leadership focus). The HR Manager responded that the management/leadership focus output was an amalgamation of different responses to the OPQ and that it was only one element of the Leadership Report. She went on to draw the Directors' attention to the fact that the candidate's comparative area of strength was within the **Gaining**

Support function which had been identified as being key during the visionary workshop, for 'winning the hearts and minds' of others.

The HR Manager encouraged both Directors to reserve judgement until the report had been discussed in more detail, and all functions had been considered. The HR Manager went on to emphasise that the Leadership Report was one aspect of the entire selection process and that it should be used to guide the questions at interview and contribute to the final decision making process at the end of the selection process rather than being used to drive decisions at this stage.

The HR Manager went on to discuss each function in more detail. Particular areas were identified as being critical for the Directors to explore at interview for candidate one.

- **Management Versus Leadership** focus. Low scores on both the management and leadership areas needed to be explored in more detail when considering each of the four leadership functions.
- **Developing the Vision**. At the visionary workshop it was identified that that Finance Director would still need high levels of analytical ability, however candidate one's output was particularly low on the transactional competency, Analysing & Interpreting, which can pose a potential business risk in terms of inaccurate analysis of the situation when developing the vision and setting strategy.
- **Sharing the Goals**. Low scores on the Adapting & Coping competency indicated a potential tendency to find it difficult to cope personally with the personal pressures of organisational change. The associated business risk could be that the individual may have avoided change situations in order to manage personal stress.
- **Gaining Support**. High scores on both Leading & Deciding and Supporting & Cooperating indicated a people focused approach which was very important for the new Finance Director role. However the Finance Director would still be responsible for making unpopular decisions, therefore it was important to investigate how comfortable the candidate would be when making tough decisions that may have negative impacts upon others.
- **Delivering Success**. A high score on Organising & Executing but a low score on Enterprising & Performing indicated the candidate might miss potential commercial opportunities which would be key for the Finance Director role. It also indicated that such a strong preference for a planned approach may make the candidate uncomfortable if they were required to work in a more flexible manner.

The HR Manager suggested the following potential interview questions relating to candidate one's profile:

Overall Management Versus Leadership Focus:
- Describe your leadership style: what kind of leader are you?
- Give me an example of a time when you have inspired others to achieve strategic objectives.

Developing the Vision:
- Tell me about a strategy or vision you have developed. What information did you take into account?

Sharing the Goals:
- Describe a situation where you have had to implement a difficult change. How did you manage the impact of change on others? What effect did the changes have on you?

Gaining Support:
- Tell me about a time when you have had to make a difficult decision that had negative consequences for others.

Delivering Success:
- Describe a situation where you have proactively identified a commercial opportunity for your organisation.
- How have you previously managed competing priorities and objectives?

The HR Manager went on to follow the same process with candidates Two and Three, highlighting areas of strength, development and potential business risk along with suggesting interview questions in relation to the leadership functions.

Outcomes

The Managing Director and HR Director conducted the interviews, based on the questions they had prepared, gathering evidence from the candidates. After the interviews they reviewed all the information gathered across each of the selection stages and confirmed which leadership functions and job relevant competencies (transactional versus transformational) were most likely to be areas of strength and weakness for each candidate.

In doing this the Directors' aim was to select the candidate who was the best fit for the Finance Director role. As the OPQ was only an element of the process, they decided to appoint candidate Three. Candidate Three, they felt, provided the strongest transformational leadership focus while maintaining sound analytical ability.

The Managing Director said:

"The Leadership Report really helped me to focus on each candidate's likely style of leadership which really brought to life how they might typically behave in the role. It is also very reassuring when hiring to such a high risk role, that the Leadership Report is proven to predict future leadership behaviour so well. By identifying potential areas of concern from the Leadership Report output, I could identify which areas needed further probing at interview and prepare focused competency-based interview questions for each candidate. This helped me to structure the interview, making best use of time and getting the most information from each candidate. It was an invaluable aid to objectively collect information and select the candidate most likely to succeed in the Finance Director role."

6.2 Case Study 2: Using the SHL Leadership Report to support Individual Development Activities

Context

A General Manager (GM) within the organisation identified in her annual appraisal that she would like to partake in some focused personal development and that one day she would like to move into a more senior role, but that she was having difficulties in identifying the areas that she should focus her development on. Her line manager (the Regional Director) had previously completed the OPQ and had received feedback on the Leadership Report which he found very useful in terms of identifying areas for development in line with management and leadership behaviours. The Regional Director therefore referred the General Manager to HR who was able to administer the OPQ and generate the Leadership Report from their own SHL On Demand system. This was a pure development activity and as such it was not intended for the Leadership Report output to be compared against a specific role (as would occur if intended for succession planning purposes – see Study 3 below). However, prior to the feedback session, the HR Manager spoke to the GM's line manager who emphasised that anyone progressing to a Director position within the organisation would be required to 'live and breathe change' and be able to 'win hearts and minds' due to the amount of organisational changes that were planned for the next three -five years.

Using the SHL Leadership Report

After completing the OPQ questionnaire online the General Manager met with an OPQ trained HR Manager who was responsible for delivering the feedback session based on the Leadership Report output. Ahead of the feedback session, the HR Manager spent an hour familiarising himself with the Leadership Report, highlighting areas that he may wish to explore in detail during the feedback session. For example, areas that stood out as being key to explore were particularly in relation to the Gaining Support function where the GM displayed a low score on the Supporting & Cooperating competency indicating that she may not always provide the support required by others in order to help them through change processes.

The extract from the Leadership Report below shows the overall summary for the GM across all functions.

Figure 6.2.1. Overall summary for the GM across all functions.

Leadership Function	Transactional	Less	More	Transformational	Less	More	Preferred Leadership Style
OVERALL	**MANAGEMENT** *Delivering dependable performance and reaching operative objectives.*			**LEADERSHIP** *Inspiring both people and the organisation to become proactive and to achieve beyond expectations.*			**Balanced Mix of Styles**
Developing the Vision	**Analysing & Interpreting** *Analysing complex information and applying expertise.*			**Creating & Conceptualising** *Producing innovative ideas and thinking strategically.*			**Balanced Mix of Styles**
Sharing the Goals	**Adapting & Coping** *Responding and adapting well to change and pressure.*			**Interacting & Presenting** *Communicating with, persuading and influencing others.*			**Change Ambassador**
Gaining Support	**Supporting & Co-operating** *Supporting others and working effectively with people.*			**Leading & Deciding** *Initiating action, giving direction and taking responsibility.*			**Decision Maker**
Delivering Success	**Organising & Executing** *Planning, working in an organised manner and focusing on delivery.*			**Enterprising & Performing** *Focusing on results and on achieving goals.*			**Entrepreneur / Business Driver**

As the purpose of the feedback session was to explore the GM's individual style and preferences and in turn identify potential areas for her development in terms of effective leadership behaviours, the HR Manager began by asking some general questions in order to encourage the GM to self reflect and gauge her level of self awareness in order to help him to position the feedback. This was important, not only to get the individual thinking proactively about their potential areas of strength and development but by identifying how the individual perceived themselves it was possible for the HR Manager to appropriately position the feedback; for example if some of the feedback directly conflicted with the individual's self perception (which is described below).

In order to encourage the GM to reflect on their leadership style before going into the detail of the Leadership Report, the HR Manager asked:

- What do you consider to be your strengths as a leader?
- What kind of leader are you?
- What contexts do you prefer to lead in?

- Where do you think you would like to focus your development in terms of leadership behaviours?

The GM stated that she perceived herself as being a 'people person' who works well with others and has an inclusive style. She reflected that she had received a lot of feedback from colleagues in other departments to say they appreciated her friendly approach and that they found her very personable to deal with. She said that she really enjoyed taking charge of her team and has enjoyed a very successful year where her team had achieved and even exceeded all of their targets and objectives.

The HR Manager then went on to discuss the detail of the Leadership Report with the GM. He began by first explaining the structure of the report, and then went on to discuss each section of the report in turn, beginning with the overall management versus leadership focus output. The HR Manager structured the feedback by first drawing the individual's attention to their position on the Nine Box Model grid, and then to the textual description of their 'preferred style'. The HR Manager then asked the individual the following questions:

- What are your thoughts on the description of your indicated preferred style?
- Do you recognise the description in yourself and the way you approach your work?
- Is there anything you don't agree with? why?

The HR Manager then went on to say:

"Okay well let's look at your responses to the OPQ in a little bit more detail".

He fed back the interesting outputs from the OPQ (such as any particularly high or low scores or where he had previously identified patterns in the outputs between the related competencies), asking for the individual to give real life examples in order to validate the outputs. The HR Manager completed the feedback for each section within the report by asking the individual to reflect on the At their Best and May Find Challenging statements, again asking the individual to think about which of the statements they recognised within themselves and any that they disagreed with and why.

Some of the most interesting findings from each of the report sections are summarised below:

Developing the Vision
The GM's preferred style was within the Balanced Mix of Creating & Analysing area. As stated above, the HR Manager asked the GM to reflect on the definition and feed back if there was anything that she did/did not particularly agree with. As the GM did not display any extreme scores within her OPQ output, the HR Manager went on to ask:

- What do you think your strengths are in terms of 'developing the vision'?
- What would you say are your areas for development?
- Tell me about a time where you have generated a completely new idea or vision for the future? What information did you base it on? How did you know it could be achieved?

The GM shared that she enjoyed analysing information and using it in different ways to identify new and improved ways of working, but that she tended to find 'blue sky thinking' where she would be required to generate completely new ideas from scratch more challenging. From this conversation it was then agreed that a potential

development focus for the GM would be to become involved in a management strategy development group which met each quarter to review the business performance and strategies to enable it to reach its goals. This would expose the GM to situations where she would be required to contribute to strategic and visionary conversations alongside her Senior colleagues.

Sharing the Goals
The GM's preferred style was 'change ambassador' indicating a high score on both the Adapting & Coping and Interacting & Presenting competencies. The GM agreed that she enjoyed interacting with others, and saw her communication and persuasion skills as being some of her strongest attributes. She reflected that she enjoys change situations and worked well under pressure or in difficult or uncertain situations.

When the HR Manager looked into her OPQ output in more detail, he saw that the GM scored sten 8 on the Independent Minded dimension. As this was marked with an asterisk on the report, he knew that in this instance a high score was less preferable for the Adapting & Coping competency. As a result he asked the GM:

- Tell me about a time when you have accepted a majority decision and followed the consensus.

The GM found it quite difficult to answer this question and stated that if she disagreed with something she would let people know how she felt, even if she was in the minority. The HR Manager pointed out that as was indicated within the 'may find challenging' box – the GM potentially may not always realise that others may not be coping as well with change situations as she does (due to her high levels of resilience, optimism and calm approach). Therefore, even though she was positioned within the top right hand box of the Nine Box Model grid, there were still development actions:

- Take time to consider the pro's and con's of both her own approach and the suggestions of others, identifying when it may be more beneficial to go with the majority, especially in order to help drive change forward (rather than blocking others ideas with her own views).
- When driving forward a change initiative, take time to talk to those affected, gathering feedback on how they are coping and adapting to the changes to ensure she was offering an appropriate level of support.

Gaining Support
Interestingly the GM's preferred style came out strongly as a decision maker, indicating a very high score on Leading & Deciding and a low score on Supporting & Cooperating. When positioning the feedback, the HR Manager was aware that at the beginning of the feedback session, the GM had reflected that she believed others perceived her as a warm and personable colleague. He was therefore mindful that taken at face value, the low score on Supporting & Cooperating may conflict with her own self perception. However he realised that it was possible that she may adopt a more direct style when leading her own team. As with the previous functions, he asked the GM to reflect on the decision maker definition and talk through her thoughts, stating:

"Your responses to the questionnaire indicate that you fall within the 'decision maker' box....read through the definition and tell me your thoughts – do you recognise this?"

She immediately agreed that she very much enjoyed taking control of situations and leading from the front, but was a little surprised that she came out so strongly task rather than people focused on the Supporting & Cooperating competency. The HR

Manager then went on to say:

"*Okay lets go into a bit more detail....your OPQ responses indicate a strong preference for taking decisions quickly combined with a definite tendency to make decisions alone in the absence of consultation. With that in mind, how do you go about gaining the buy in and support of others for your decisions and ideas?*"

The GM appeared to be very sales focused in her approach and at times due to her action orientation and decisive nature, could 'forget' to ensure adequate attention was given to others views and opinions. She actually stated:

"*I get frustrated with consultation for consultation's sake....if I'm the ultimate decision maker then in those situations I will get on with it and take a decision myself. But if I'm not the expert I will ask other people for their opinion*"

The HR Manager asked the individual to reflect on how this approach could be impacting on her work, and she agreed that she could potentially involve others more in making decisions. The HR Manager suggested that she may potentially develop her supporting and cooperating behaviours by:

- When making decisions that involve/impact upon others, ask at least three people their opinions and share her decision making process with them.
- Before initiating action on a task or project, draw up a project plan detailing all other individuals that could be impacted/should be involved and engage in discussions with these key stakeholders from the outset.

The HR Manager also encouraged the GM to think of ways in which she could support and cooperate with others more, such as introducing regular one to one sessions with each of her team members in order to proactively offer support and guidance should they require it.

Delivering Success
The GM's preferred style was positioned within the Entrepreneur/Business Driver area, indicating a high score on the Enterprising & Performing competency and a mid range score on the Organising & Executing competency. The HR Manager asked the GM to reflect on their preferred style and in response to this she stated that she recognised herself as being highly competitive and driven to achieve goals and objectives stating:

"*for me failure isn't an option*".

The HR Manager asked the GM to think about how this could impact both positively and negatively on how she leads her team. In response to this she stated that at times she can become fixated on the end goal and can become frustrated if members of her team do not share the same degree of enthusiasm and commitment as herself.

Outcomes
The HR Manager agreed development actions with the individual and was able to link the different outputs from the Leadership Report into a meaningful developmental plan for the GM. After the completion of the feedback session, it was clear that the GM was very results oriented and committed to achieving goals and objectives. A confident communicator and someone who was at ease making fast and difficult decisions, her key area of focus was ensuring that she was investing enough time and effort in communicating to, involving and supporting others who may be impacted by her decisions and actions.
As the Leadership Report was generated purely for development purposes, the GM's

line manager did not have automatic access to the report – the report was the property of the GM. Therefore the GM was encouraged to set up a meeting with their line manager in order to discuss an appropriate course of action in terms of initiating development activity and review.

6.3 Case Study 3: Using the SHL Leadership Report to support Organisational Development Activities such as Succession Planning

Organisation Z did not have any development processes or systems in place in terms of being able to proactively identify employee development needs, nor any way of identifying the current pool of talent within their organisation in terms of who was ready (and willing) to progress into a more Senior role. Therefore a need was identified by their Organisational Development (OD) Manager to develop and implement an 'end-to-end' talent management and succession planning system which enabled the organisation to identify their future leaders as well as identify the development requirements of their employees. The organisation was keen to identify and develop their own future leaders because they understood it would be less costly and time consuming to develop and promote from within than it would be if they were to hire externally to future vacancies. Internal promotion would also ensure the protection and maintenance of organisational knowledge as well as being a great method for engaging and motivating staff through investing in their development and planning for their progression. The identification of future leadership potential was even more important for Organisation Z at this time because they had identified that three out of the six Senior Managers (including the Managing Director) within the Senior Leadership Team (SLT) would be due for retirement within the next two to three years and there was currently no-one recognised within the organisation who could potentially fill these roles within the timeframes.

The OD Manager therefore proposed to begin the succession planning process by assessing leadership capability against the Managing Director level (the most senior managerial level within the organisation). He was interested in identifying who, if anyone within the SLT might be ready or ready with some development to move into the Managing Director role once he retired in two and a half years time.

Before the assessment of leadership potential could be conducted, it was first imperative for the OD Manager to understand the requirements (in terms of competencies and behaviours) of the Managing Director role in order to assess the SLT against them. The OD Manager did this by conducting a job analysis and role profiling exercise of the Managing Director role, identifying the key behaviours required for effective performance in the role. The OD Manager also conducted a visionary interview with the Managing Director in order to clarify the strategic aims of the business going forward and identify any potential changes that may affect the nature and requirements of the Managing Director role over the next three-five years.

The critical UCF20 competencies for the Managing Director role were:
- Formulating Strategies & Concepts
- Entrepreneurial & Commercial Thinking
- Leading & Supervising
- Persuading & Influencing
- Creating & Innovating
- Coping with Pressures & Setbacks

The OD Manager mapped the UCF20 competencies (above) to the Great 8 which highlighted the need for a strong transactional focus on all of the leadership functions, apart from Sharing the Goals which required an equally strong transactional and transformational focus due to the need to be able to influence and persuade as well as being able to respond well and adapt to pressure and change.

Once the job analysis was complete and critical competencies and behaviours for the Managing Director role had been identified, the assessment process was designed by the OD Manager. The assessment was to include: completion of the OPQ, generation of the Leadership Report, an OPQ feedback/validation interview and a strategic level analysis and presentation exercise. The SLT completed the OPQ online prior to the face to face assessment. Once the questionnaire was complete, the OD Manager who was OPQ qualified, generated the Leadership Report and used this report to guide the questioning at the interview stage, utilising the interview as an opportunity to validate the participant's responses and indicated preferred styles against the leadership functions within the Leadership Report.

Using the Report
Ahead of the face to face validation interviews with the members of the SLT, the OD Manager read each of the Leadership Reports in order to identify in advance potential areas of strength and development need and plan the questions/areas to probe for the validation interviews.

The OD Manager used the Managing Director competency profile in order to focus his interpretation of the Leadership Reports. He was looking for evidence to demonstrate areas of strength/development in relation to the Managing Director competencies (for example high scores on Creating & Conceptualising within the Developing the Vision function; high scores on Adapting & Coping within the Sharing the Goals function), however he was also looking at the preferred style on each function overall as very high scores on one of the competencies and very low scores on another would potentially carry with it certain business risks (see Appendix 1 for more information on business impacts).

Figure 6.3.1. Developing the Vision function for one SLT member

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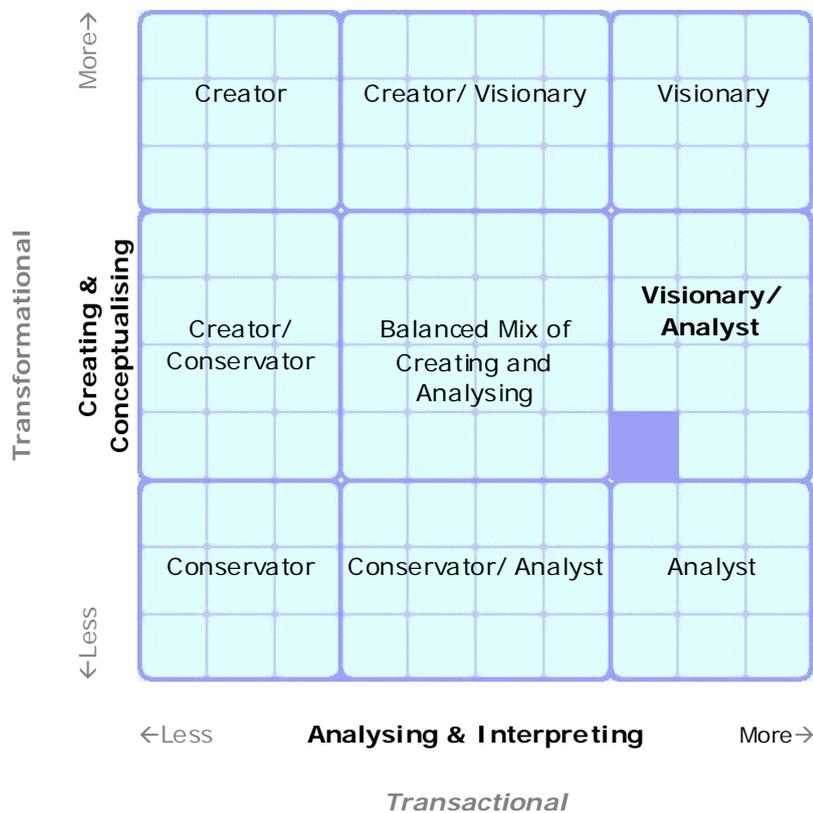
The OD Manager knew from the job analysis of the Managing Director role that creativity and innovation was an important behaviour required for effective performance in the Managing Director role. This SLT member however had an indicated preferred style of Visionary/Analyst which reflected a relatively high score on Analysing & Interpreting and a moderately low score on Creating & Conceptualising. In terms of the Developing the Vision function this suggested that the individual may struggle to generate new ideas and/or generate inadequate solutions due to limited consideration of alternatives. This was supported by the results on the Innovative OPQ dimension - sten 3, suggesting that the individual has a strong tendency to build on other people's ideas and is less likely to be creative and inventive. The OD Manager therefore decided to probe further at the validation interview by asking the question:

- Describe a situation where you have generated a vision for your department or team. Why was it necessary to develop this vision? What alternatives did you consider?

Another SLT member's preferred style on Developing the Vision was Creator. Even though this individual was clearly demonstrating preferences for generating new ideas and challenging the status quo which was in line with the need for a Creative & Innovative individual, this also meant a relatively low score on Analysing & Interpreting which carried its own risks for the Managing Director role in terms of potentially inaccurately analysing the situation which could result in the development of an inappropriate strategy or vision for the situation. In this instance the OD Manager planned to ask the following question at the validation interview:

- Describe a situation when you have generated a vision or strategy for your department or team. What information did you consider? How did you reach your conclusions?

The validation interviews were conducted on a one to one basis and the OD Manager followed the same process for all members of the SLT. He began by encouraging the SLT member to self reflect on their leadership style and preferences ahead of delving into the report, asking questions such as:

- What kind of leader are you?
- What would you say are your main areas of strength and development need in terms of leadership behaviours?

As with any best practice Leadership Report feedback session, he then progressed into the detail of the report, beginning by explaining the structure of the report and the leadership functions. He then went on to explore each function in more detail, asking for the SLT member to reflect on their preferred style, and utilising the OPQ output to gather more in depth reflection and evidence in order to validate their preferred leadership style in relation to each function.

Following the Leadership Report feedback on each function the OD Manager asked each SLT member where they would like to focus their development within each leadership area and discussed suggestions for activities that could help them move in that direction. However in some instances he had to manage the expectations of the individual, for example when one individual expressed desire to move from the Implementer area of the Delivering Success function to the Entrepreneur/Business Driver area. The OD Manager explained that while it would be possible to develop their behaviour in this direction (e.g. moving two-four small boxes on the grid) with focused development, it would not be possible to change their preferences quite so dramatically as their preferred style was an indication of their natural tendency which tends to stay relatively constant over time. In this case, the OD Manager focused the

individual on developing more towards Business Driver/Implementer style which would mean focusing development activities in relation to the Enterprising & Performing competency. The OD Manager suggested the following development activities:

- Set yourself one target a week that pushes you outside of your comfort zone (e.g. Putting yourself forward for a project/task that will be challenging for you to achieve).
- Take part in one self development activity per quarter (such as attending a training session or conference)

Once the report feedback was complete, the OD Manager asked each SLT member what their aspirations and career expectations were for the next one-three years. This was essential to the process as there was little point identifying an individual who was ready to progress to the Managing Director role if they did not have the desire to progress.

Outcomes
Once the validation interviews were complete, the SLT members undertook the analysis and presentation exercise.

The scores for each participant on all aspects of the assessment process were discussed by the OD Manager and the Managing Director and each participant was assigned a 'readiness rating' in relation to how soon they would be ready to progress to the next level within the organisation. Only one of the SLT had been identified as being 'ready' to progress to the Managing Director role within 12-18 months with focused development in terms of the Analysing and Interpreting competency. It was in fact the individual who had the preferred 'Creator' style in terms of the Developing the Vision function discussed above. The Leadership Report and subsequent validation interview added to this decision because it transpired through the feedback discussion that the individual had over the years decided to delegate 'number crunching' and 'detailed analytical' tasks to her team members in order to focus on more strategic issues. She was clearly able to analyse information accurately as demonstrated by the effective conclusions that she drew from the analysis presentation exercise, it was just no longer her preference to 'get absorbed in the detail'. The OD Manager therefore proposed development actions aimed to challenge her to analyse complex business information on a more regular basis, supporting the Finance Director in calculating forecasts and projections for the business over the coming 12-18 months. The SLT Member responded by saying:

"It will be great to be able to utilise my analytical skills within such a strategic context."

6.4   Case Study 4: Using the SHL Leadership Report for Team Development Activities

Context

The organisation in this example had recently merged with a competitor company. From the outset the new organisation faced 'people' challenges as they restructured, redeployed and made redundancies in order to create a fully integrated organisation with a single Senior Leadership Team (SLT) and central supporting functions. The 'new' SLT consisted of: the Chief Executive, Chief Finance Officer, Chief Operations Officer, Vice President of Sales and Head of Human Resources. As the SLT was mixed in terms of their previous company's heritage, after three months of trying to 'hit the ground running' as a new team, they concluded that they would benefit from a focused team development exercise in order to facilitate their effectiveness and cohesiveness as a team.

The HR Director suggested completing the OPQ and using the Leadership Report to identify common areas of strength and development which should help them to understand each other better and improve their overall performance as a team.

Using the Report

The Head of Talent Development was asked to take control of the facilitation and delivery of the process as he was OPQ qualified. He decided to first give one-to-one feedback to each SLT member in relation to their Leadership Report output and then aggregate the team outputs for the purpose of a half day facilitated team building workshop. When delivering the one-to-one feedback the Head of Talent Development encouraged the SLT members to think about their preferred style and how it could be impacting on how they interact with others at work, especially within the context of the merger.

In preparation for the team workshop, the Leadership Report outputs were aggregated in order to visually display the team's spread of styles across each of the Nine Box models. The workshop was intended to give the SLT the opportunity to see their aggregate team scores and discuss the implications for the effective functioning of the team going forward.

The Head of Talent Development gave the team the option to anonymise the aggregate feedback and in response the SLT agreed that they would prefer to keep their outputs anonymous given the sensitivities of the working relationships and current situation (they did not feel as though they 'knew each other well enough' to share such personal information at this stage). They wanted to keep the discussions high level in terms of improving the overall team functioning rather than getting bogged down in too much detail regarding specific individual styles. The Head of Talent Development explained that by making the outputs transparent and through identifying individuals against their preferred styles, they may actually help their understanding and working relationships at an interpersonal level due to a greater understanding of their colleagues' own specific preferences, but the consensus was to go with anonymous aggregate feedback which the Head of Talent Development respected.

At the beginning of the workshop, the Head of Talent Development began by introducing the purpose for the workshop and setting some ground rules such as: keeping it developmentally focused; not focusing on individuals but the overall styles and preferences of the team as a whole; identifying aggregate areas of strength and areas in which they might be weaker as a team and how these could be overcome.

Before delving into the detail of the team outputs, the Head of Talent Development conducted a visionary interview with the SLT in order to identify the strategic aims of the business and ensure any development initiatives were aligned with business aims and goals. He therefore facilitated discussions by asking the following questions:

- What are the strategic aims for our business?
- What does that mean for each of its functions?
- Given these aims and implications, what does it mean for us as a leadership team? How do we need to work together? What do we each need to contribute to the team as individuals?

The Head of Talent Development then went on to conduct a gap analysis, first focusing on 'where are we now as a leadership team?'. At this stage in the process, the Head of Talent Development fed back and discussed the aggregate outputs from the Leadership Report for each leadership function, at each stage asking:

- Where are we now as a leadership team?
- What do we each contribute?
- What works well?
- What could work even better?

The main findings from this process are outlined below:

Figure 6.4.1. Overall Management Focus Vs Leadership Focus.
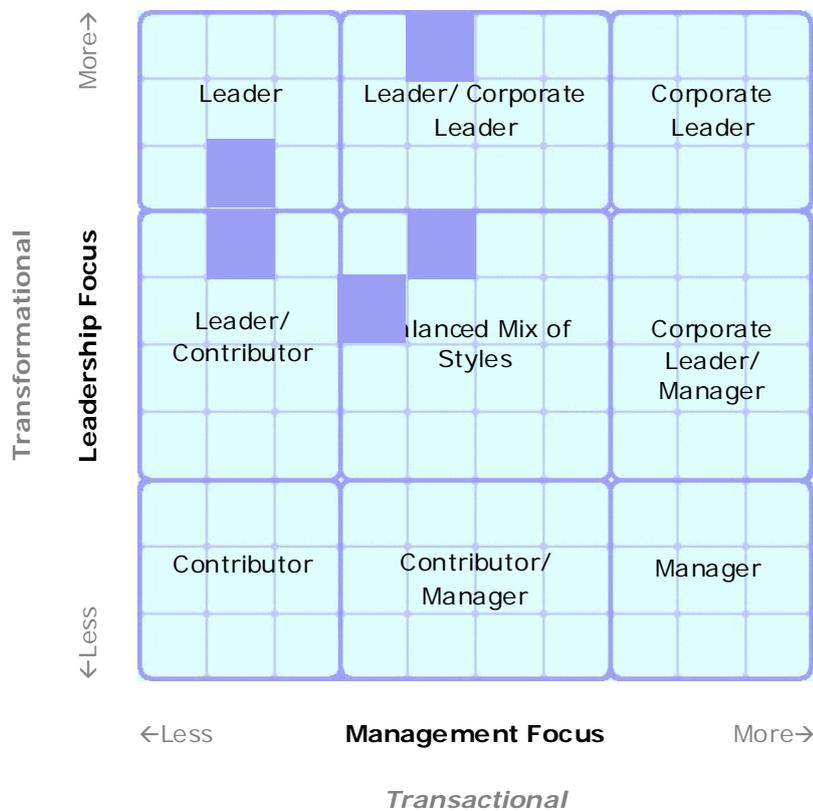
Generally as a group the SLT were high on leadership focus but lower on management behaviours. The implications being that as a team, they were likely to enjoy change

and generating new ideas along with being comfortable with setting direction and taking the lead. However the risk was in relation to the extent to which they would turn their creative ideas into workable solutions and gain the support and buy in of their peers and teams. The group agreed that one of their frustrations was the fact that at meetings, they all came up with lots of ideas but no one took the lead in driving them forward and turning them into a practical reality. They also (with a little coercion!) admitted that:

"There are many strong personalities within this room, and all of us probably like to think we have the best ideas. I guess we need to learn that for the good of the group, we sometimes need to allow others to take the lead rather than all of us trying to be in the spotlight all of the time."

The group were encouraged to discuss what they thought they could do differently in order to ensure transactional aspects associated with effective management were not overlooked going forward.

Figure 6.4.2. Developing the vision.
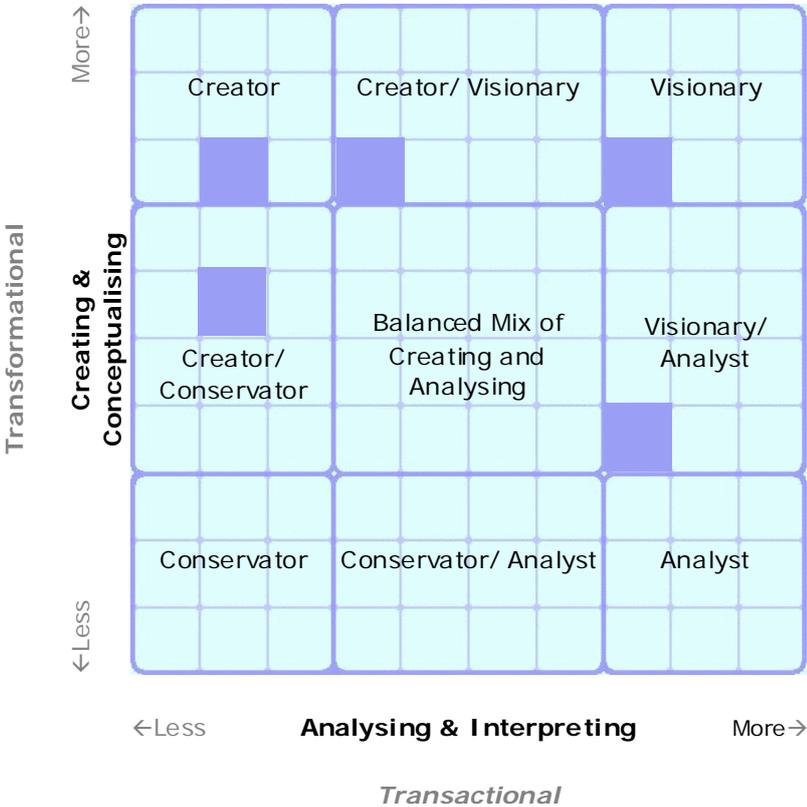
In terms of the Developing the Vision function, the aggregate scores showed collective strengths on Creating and Conceptualising whereas there were lower scores on Analysing & Interpreting overall. The Head of Talent Development explained the potential business risk as being the potential for a vision or strategy to be developed on the basis of an inaccurate or lack of analysis of the situation, meaning that the solution may not be appropriate for the situation.

The CEO reflected that it had been intentional when selecting who would make the integrated SLT from the two organisations, to select those individuals who were brave

enough to challenge the status quo and be able to lead in times of unrest and change. He stated that he had not considered the potential impact that this could and subsequently did have on their ability to come up with an appropriate and cohesive strategic plan and vision for the new organisation.

Figure 6.4.3. Sharing the Goals.

		Adapting & Coping	
More→	Communicator	Communicator/ Change Ambassador	Change Ambassador
	Communicator/ Stability Seeker	Balanced Mix of Interacting and Adapting	Change Ambassador/ Adjuster
←Less	Stability Seeker	Stability Seeker/ Adjuster	Adjuster

Transformational — Interacting & Presenting (vertical axis)

←Less   **Adapting & Coping**   More→

Transactional
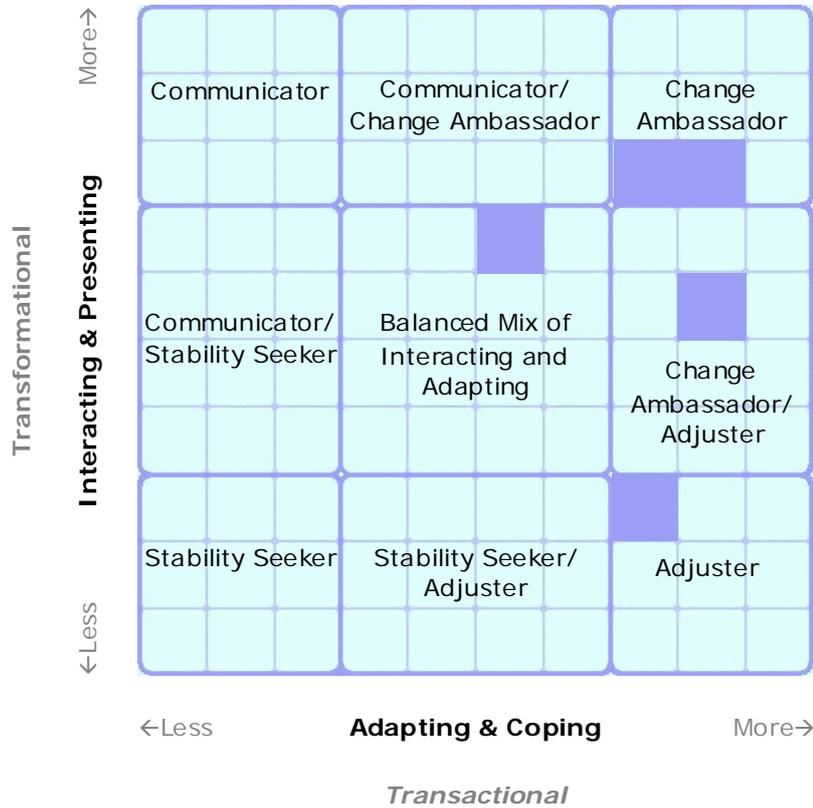
Following on from the CEO's comments in response to Developing the Vision, it was no surprise to see the SLT's aggregate outputs indicated high scores on Adapting & Coping and Interacting & Presenting. The Head of Talent Development pointed out that as a team they would need to be mindful of those who may have difficulties adapting to change.

In response to The Head of talent Development's question 'what could you be doing differently' they responded by saying:

"We will commit to ensuring we make ourselves visible and accessible to our management teams to ensure they are able to voice their concerns and feed into the organisational planning processes. It is important that they feel involved in any changes that may affect them and that they know who to go to for support should they require it."

Figure 6.4.4. Gaining Support.

In terms of the Gaining Support function, there was more of an even distribution of styles across the team. However, collectively they tended to display comparative strengths in terms of Leading and Deciding, therefore supporting their previous reflections that as a team they currently would typically all attempt to 'take the lead' in most situations which was proving counter-productive in terms of their ability to move situations forward effectively.

In terms of what they could do differently going forward they reflected that they should focus on ensuring they worked together more collaboratively as a team and ensuring that the right person always took control of the situation at hand depending on who was most 'expert' in the area, even if that meant placing their faith in others to take the lead on making important decisions.

Figure 6.4.5. Delivering Success.
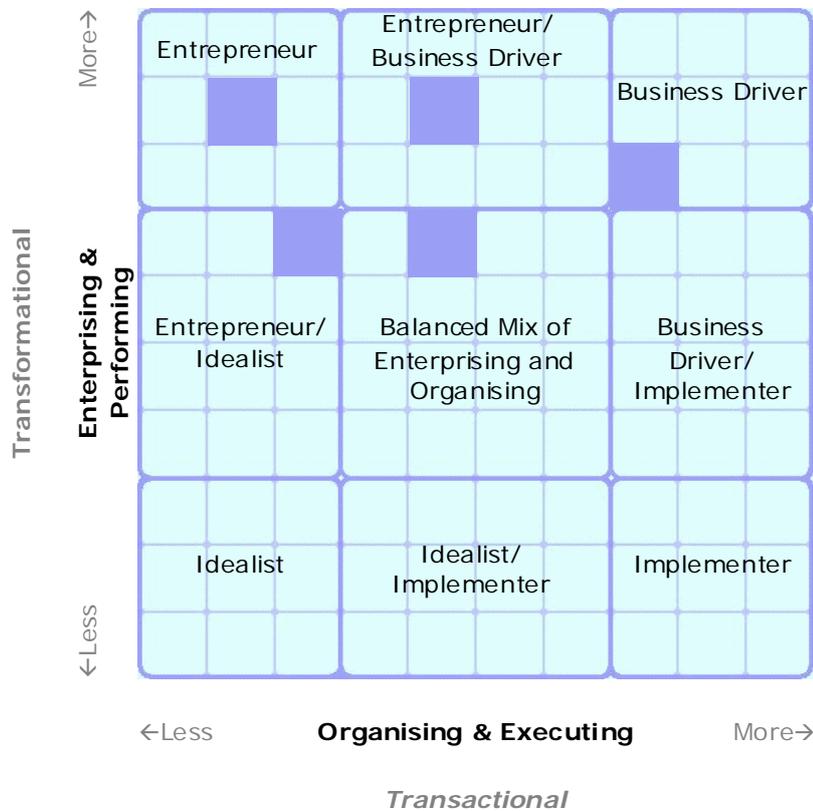
As a group, their preferred styles in relation to the Delivering Success function tended to be relatively high on Enterprising and Performing. The CEO explained that again this had been intentional when selecting the new SLT; that all members had previously demonstrated strong commercial focus and ability. He was therefore pleased that the Leadership Report outputs had corroborated their perceptions of the individuals in the room.

Towards the end of the workshop the team members began to try and guess who occupied which coloured square on each of the grids (something the Head of Talent Development had predicted would happen at the outset!). The Head of Talent Development guided the discussion to ensure all individuals felt comfortable sharing their information. He emphasised the benefits of sharing individual profiles, as for example in this instance where someone has a strong entrepreneurial focus they may miss some of the detail when planning how to achieve goals and objectives (if scoring lower on Organising and Executing), therefore by identifying individuals in the team who are stronger by nature at attending to detail, and getting the two people to work together, they would be able to compliment each other's areas of strength. It would also help individuals to understand why in this instance some people needed the detail and others needed it less.

In order to complete the gap analysis exercise, once all of the aggregate information had been shared the Head of Talent Development reflected the SLT back over the outputs of the visionary discussions at the beginning of the session and asked:

- What do we need to change in order to close the gap between where we are

now and where we need to be?

- How can we practically make this happen?
- What will we personally commit to keep doing/doing more of/stop doing/do differently?
- How can we monitor our progress and hold ourselves accountable for these actions?

Outcomes

In identifying common areas of strength and development in relation to leadership style, the CEO stated:

"In selecting individuals for the new SLT, the Board had clearly selected those who they thought would be great 'leaders' without giving thought that we would also need management focus in order to be successful. This workshop helped us to understand that we didn't all need to be 'leading' at the same time and in the same way, and that it would be beneficial to have a more balanced spread of styles within the team. It also helped us to understand why despite all of our efforts we just weren't able to resolve some of the issues…we are clearly just far too similar!"

7 Understanding the Business Impact

Although there is no absolute 'right or wrong' in terms of a person's personality, we do know that certain leadership styles can be contributing factors to different business outcomes. The Leadership Report focuses on leadership styles and competencies that predict leadership effectiveness. Leadership behaviour has a wider impact within an organisation by influencing key people and ultimately impacting revenue/organisational effectiveness. Leadership can be a high-risk activity. The level of influence and potential risk is determined by the scope of the leadership role. For example, if a CEO provides the wrong direction, or fails to have the impact necessary for achieving a change in direction, the results can be disastrous for the whole organisation. Therefore in general terms, the more senior the position, the more impact (positive or negative) the leadership behaviour is likely to have.

> *Top Tip*
> *See appendix 1 for detailed information on the different business impacts which may be associated with the various leadership styles depicted within the SHL Corporate Leadership Model. This information is aimed at helping you to work through what impact a particular leadership style might have for your organisation.*

8 Guidelines for Using the Supporting Slides

In addition to the user guide you have available to you a deck of supporting workshop slides that can be used as a resource to enable you to run internal workshops within your organisations for individuals who wish to utilise the Leadership Report in different practical contexts (in relation to selection, development and team building situations). The slide deck is constructed in a way that will allow you to pick and choose relevant slides depending on the context within which you are intending to use the report. The slides are heavily focused on practical exercises that will allow you to practice interpreting and applying the Leadership Report within different contexts.

9 Frequently Asked Questions

Q1. Do I need to be a trained user of the OPQ to use this user guide and the SHL Leadership Report?
You must be an OPQ trained user in order to utilise the SHL Leadership Report. Specific occupational requirements will vary depending on the country within which it is being used.

Q2. Is the top right hand corner always the 'best' style for a leader to have?
Not necessarily, it depends on the context and role. For example some roles will require more of a transactional focus and others will require more of a transformational focus. It depends on the requirements of the specific role and organisational context.

Q3. I see many individuals who have a 'balanced mix of styles'. Why is this?
The "Balanced Mix of Styles" label appears when an individual scores stens 4,5,6 or 7 on both the transactional and the transformational competencies for a given leadership function. As these stens fall in the middle of the normal distribution curve, they will be seen most frequently.

Q4. At what levels within the organisation is the Leadership Report suitable to be used?
The Leadership Report is designed to measure senior leadership behaviours. Therefore it is normally recommended for use at the most senior level within organisations (either for selecting to senior management positions/developing senior managers/succession planning to senior management positions in which case it may be used to profile mid level managers/development of senior teams).

Q5. What if an individual's profile is bottom left for every function, how do I position the feedback?
It is less likely but not impossible for a person's style to be 'bottom left' for every function i.e. 'less preferred style' or 'less likely to be a strength' across all competencies. During the feedback session attempt to reassure the individual by emphasising that the Leadership Report is based on the Occupational Personality Questionnaire which is a self-report measure and therefore it is solely their perception of themselves as opposed to other peoples. When feeding back on each function, probe for examples from the individual where they have received positive feedback at work. Use any evidence of this kind to explore difference in perceptions (i.e. between self and others). Where they have positive evidence from work, use this within the "feedback sandwich" format to help motivate the individual.

Q6. What if a person asks if they can change their natural style, how do I respond?
It is possible to alter an individual's style through focused development activities. While a moderate degree of change (between 2 to 4 small boxes on the grid) is realistic a complete change of style may not be possible. This is based on the belief that a person's natural preferences and tendencies will remain relatively constant and while individuals can develop, put in place "coping strategies" and learn new ways of behaving a dramatic change in style may not be sustainable longer term. Try to focus development activities on something that is achievable rather than near impossible.

Q7. What if I feed back the outputs to an interview panel and they ask me which person is best suited to the job on the basis of the SHL Leadership Report?

As with any personality output, it is not best practice to make selection decisions on a person's personality profile alone. The Leadership Report is a self report measure which depicts preference rather than ability. Therefore the purpose of the interview is to gain evidence to validate the output within the Leadership Report. Once actual evidence of behaviour has been gathered, the interview panel will be better placed to make an informed decision regarding each candidate's suitability for the role.

Q8. How do I know what a 'good' team profile looks like?
This will depend on the team in question and the organisational context. What does the organisation require from the team? What are the organisation's strategic objectives? Do the team's profiles enable them to successfully achieve their organisational objectives or would it be beneficial for them to do some things differently in order to help them to achieve their goals? Does the team require a balanced mix of styles (i.e. a range of different styles across the team) or is it beneficial to have team members displaying a similar set of styles? In order to answer these questions, a well facilitated team development workshop is recommended in order to feed back aggregate scores and complete a gap analysis exercise.

10.1 Scope and risk factors

The SHL Leadership Model focuses on leadership styles and competencies that predict leadership effectiveness. Leadership behaviour has a wider impact within an organisation by influencing key people and ultimately impacting revenue/organisational effectiveness. Leadership can be a high-risk activity. The level of influence and potential risk is determined by the scope of the leadership role. For example, if a CEO provides the wrong direction, or fails to have the impact necessary for achieving a change in direction, the results can be disastrous for the whole organisation. Each of the four main leadership functions has risks associated with it. We will first provide some questions to understand the scope of the leadership role and then discuss risk factors in relation to the four functions.

The four functions in the SHL Leadership model

Leadership Function	Definition
Developing the Vision	This involves the critical analysis of the current situation, and the generation of ideas to move forward (Strategy).
Sharing the Goals	This involves persuasively communicating the vision to others, as well as personally adapting to the changes that the new strategy brings (Communication).
Gaining Support	This involves gaining other people's support by motivating and empowering them to implement the actions needed to deliver the strategy (People).
Delivering Success	This involves using operational efficiency and commercial acumen to effectively implement the strategy (Operations).

10.2 The scope /extent of leadership impact

In assessing leadership impact it is important to consider the position the leader occupies in the organisation and the discretion (autonomy, decision-making power) that comes with the role. The more senior the position, and the more formal power the leader has, the more impact leadership behaviour is likely to have. Time is also another key factor to take into account: over what course of time is the leader expected to show an impact?

Below a few questions are listed that help determine the scope of a leadership role:

1. At what level within the organisation does the leader operate?
   a. Executive Committee or Board level
   b. Senior Management
   c. Middle Management
   d. Junior Management

2. What is the scope or extent of the leader's impact?
   a. Confined to the leader's immediate work group.
   b. Confined to their department or section within the organisation.
   c. Affecting the performance of a complete local business unit or other semi autonomous section of the company.
   d. Affecting the whole company or group nationwide.
   e. Affecting the whole company or group internationally.

3. Over what time scale is the leader expected to demonstrate an impact? More time allows the leader to demonstrate more impact, especially if it affects the wider organisation.
   a. A few months
   b. 2-3 years
   c. 5 years or more

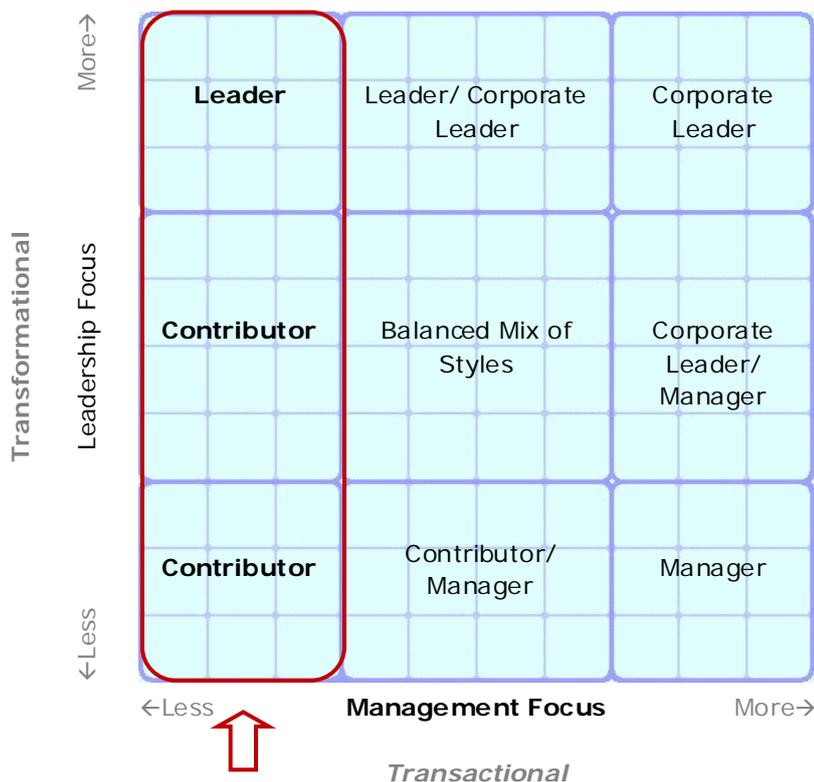## 10.3 Risk factors: What can go wrong?

One approach to risk assessment in leadership is to consider it from the viewpoint of things that can go wrong, which would critically impact on the chances of successful outcomes being achieved. Problems can arise in relation to each function and through failures of either the transactional or transformational aspects of the function. The potential risk will also be influenced by the scope of the leadership role. The larger the scope of the leadership role (for example, the more formal power the leader has), the higher the impact will be in terms of risk. The following list provides some examples by considering leadership competencies by function and the scope of the leadership role. It is intended to be illustrative rather than exhaustive.

Overall Management Versus Leadership Focus

Management represents a transactional focus on keeping the system running effectively and delivering dependable performance of specified objectives. The key competencies which are associated with a transactional focus are Analysing & Interpreting, Adapting & Coping, Supporting & Co-operating, and Organising & Executing.

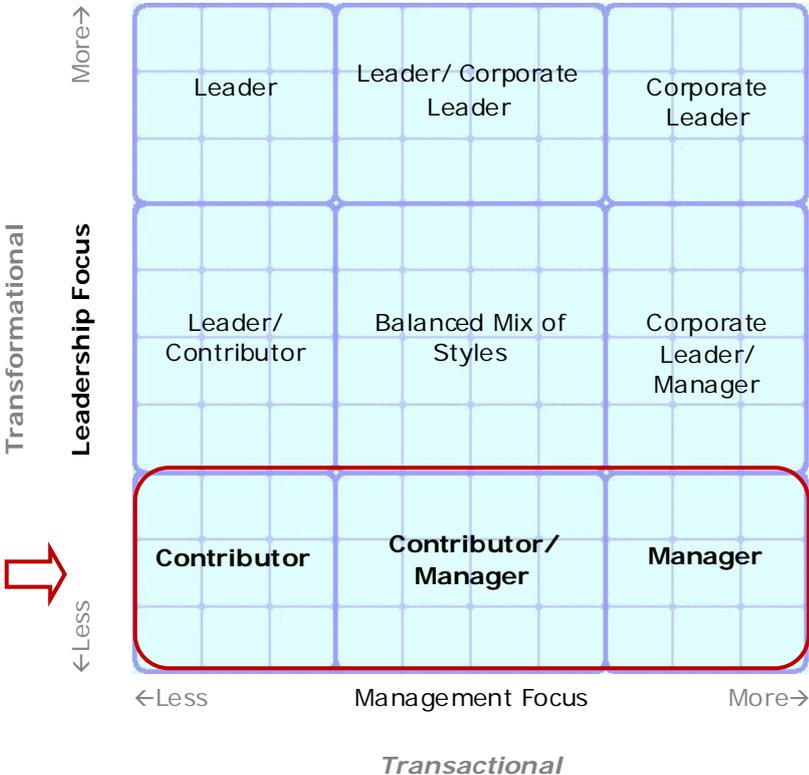The following examples illustrate the **potential risks of low scores on Management focus**:

- A strategy that is based on insufficient or inaccurate analysis.

- Good ideas not being turned into workable solutions.

- A strategy that is poorly implemented, without consideration for gaining support and buy-in from others.

- Behaviours that are aimed at realising the organisational vision are not encouraged or supported.

- Operational inefficiencies in delivering organisational goals.

	Less ← Management Focus → More		
More ↑ (Transformational) Leadership Focus	**Leader**	Leader/ Corporate Leader	Corporate Leader
	Contributor	Balanced Mix of Styles	Corporate Leader/ Manager
Less ↓	**Contributor**	Contributor/ Manager	Manager

Transactional

Leadership represents a transformational focus on creating, developing or changing the system's direction and inspiring both people and the organisation to achieve beyond expectations. The key competencies associated with a transformational focus are: Creating & Conceptualising, Interacting & Presenting, Leading & Deciding, and Enterprising & Performing.

The following examples illustrate **the potential risks of low scores on Leadership focus**:

- The lack of a clear strategic vision for the organisation.

- The need for creativity in the future vision is under-estimated, instead emphasis is placed on continuing to improve the efficiency of the status quo.

- The vision is not clearly communicated to others in the organisation, inappropriate or ineffective means of communication are used.

- Change is avoided although needed.

- There is a lack of drive or a lack of focus on challenging objectives.

	← Management Focus →	
Leader	Leader/ Corporate Leader	Corporate Leader
Leader/ Contributor	Balanced Mix of Styles	Corporate Leader/ Manager
Contributor	**Contributor/ Manager**	**Manager**

Transformational — **Leadership Focus** (More→ / ←Less)

←Less   Management Focus   More→

Transactional

Developing the Vision: The strategy domain

Developing the Vision involves the critical analysis of the current situation, and the generation of ideas to move forward (Strategy). The impact of not developing the right vision is greater, the more scope the leader has. For example, the impact would be large if the CEO of a whole organisation sets out a strategy which impacts all departments and teams and ultimately organisational revenue. By contrast, the impact would be lower if a junior manager develops a strategy for a particular project that only involves one team in the organisation and does not affect other teams.

Low scores on *Analysing & Interpreting* can pose a potential risk for developing the vision and setting the strategy. The vision may be based on an incorrect analysis of the situation, meaning that the starting point for a solution would be flawed. The following examples illustrate this by also considering different levels of influence (scope):

- The need for change is not recognised in the organization, a specific business unit or project.

- The urgency with which change is needed is either over or underestimated.

- The analysis is incomplete, ignoring important areas of the organisation, a project, or task.
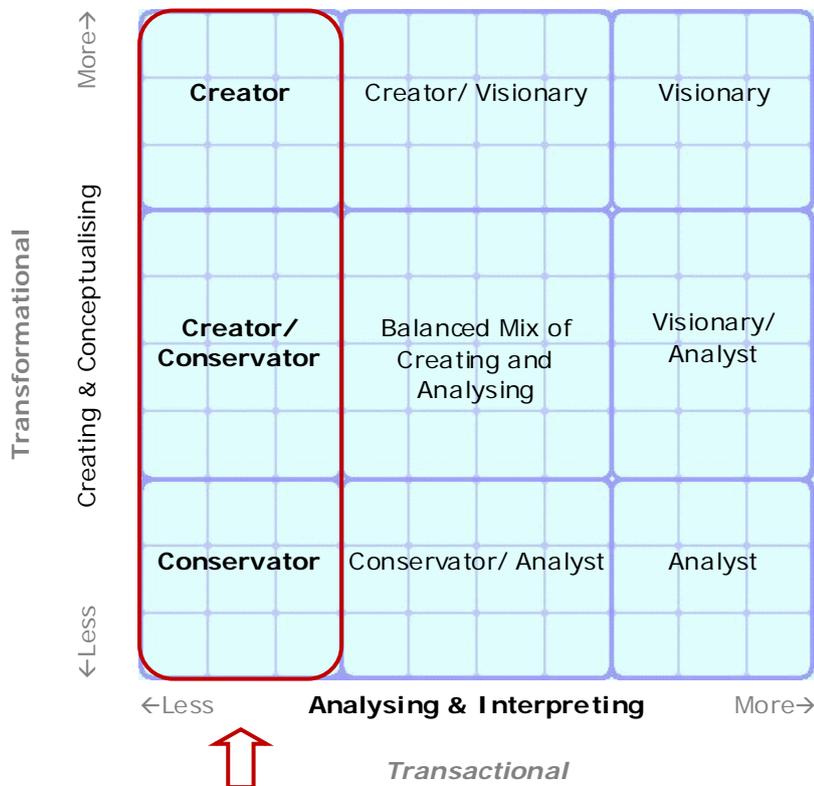
Low scores on *Creating & Conceptualising* can result in a lack of solutions, or solutions that are not appropriate. The following examples outline some risks:

- The vision represents an ineffective solution for the problem, though the analysis was correct.

- Change is initiated when none is needed because no other adequate solution is considered.

- The leader fails to pull together the right team to lead the change. This can happen if the situation is not analysed correctly (see above) or the proposed solution is not strategic enough to involve all important stakeholders.
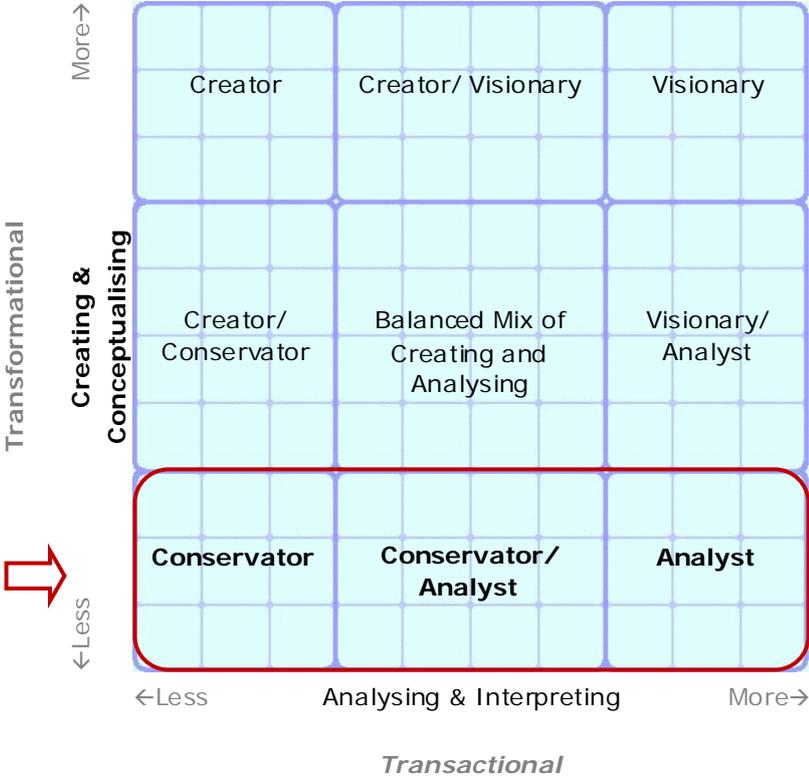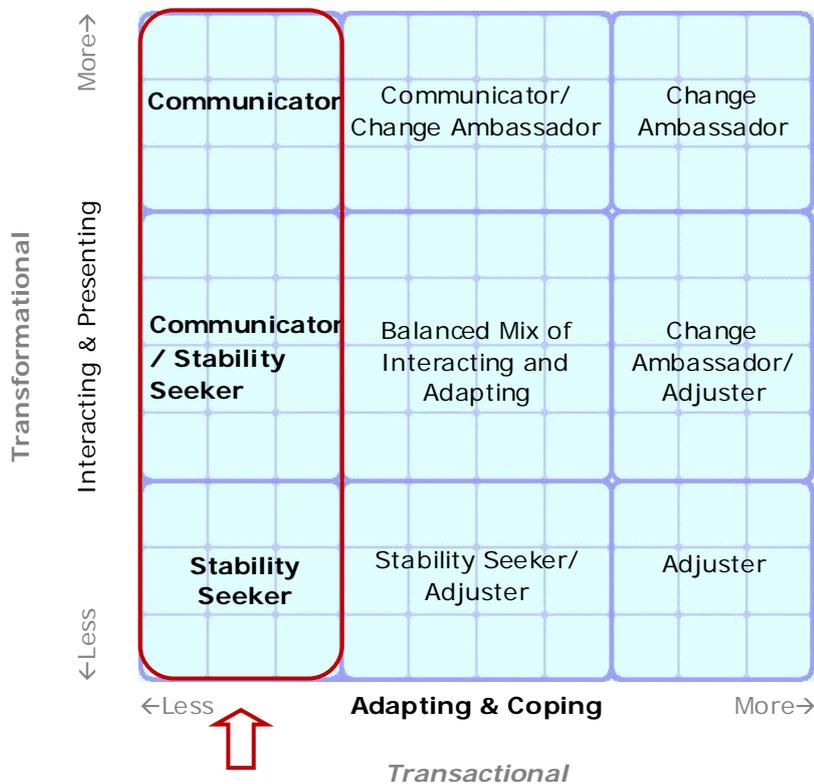
Sharing the Goals: The communication domain

Sharing the Goals involves persuasively communicating the vision to others, as well as personally adapting to the changes that the new strategy brings (Communication). If goals are not communicated effectively, potential risks can be, for example, failure to implement an organizational strategy in a whole organization, a product development strategy, or a bonus scheme for sales departments. All of these outcomes have a different scope and would affect organizational revenue to a different extent.
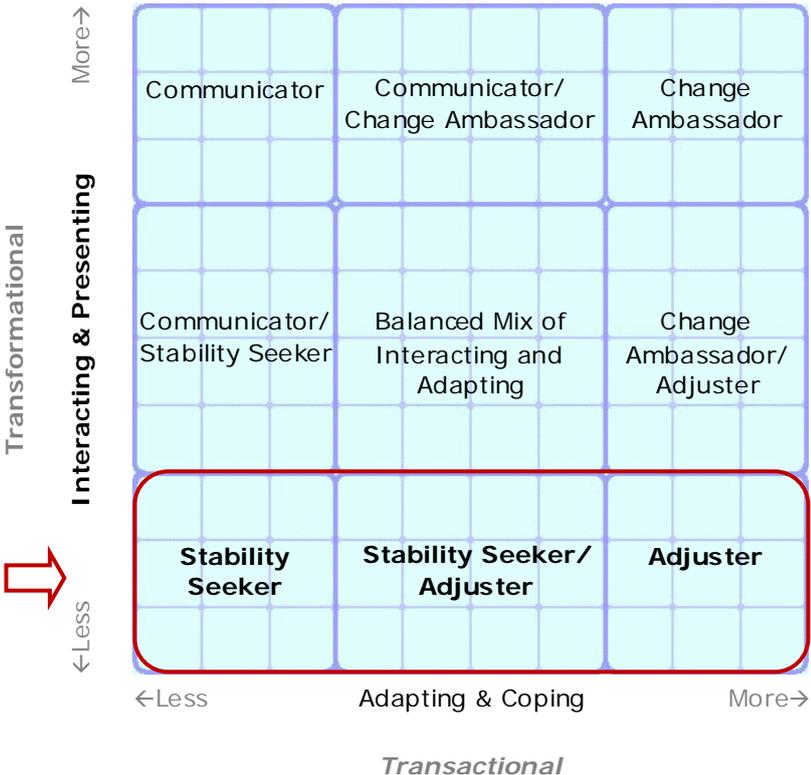
When the vision has been developed, one risk is that the leader is not ready for the consequences of the change. **Low scores on *Adapting & Coping*** can be a risk if the leader finds it difficult to adapt to the changes and potential pressures associated with change. Potential consequences are:

- Necessary change is not initiated.

- Changes are only partial and targeted at specific areas, in order to avoid major adjustments.

		Adapting & Coping →	
More→ Interacting & Presenting (Transformational)	**Communicator**	Communicator/ Change Ambassador	Change Ambassador
	Communicator / Stability Seeker	Balanced Mix of Interacting and Adapting	Change Ambassador/ Adjuster
←Less	**Stability Seeker**	Stability Seeker/ Adjuster	Adjuster
	←Less	**Adapting & Coping** *(Transactional)*	More→

Effective communication is essential for sharing the goals. Different types of risks can results from **low scores on *Interacting & Presenting.*** Examples are:

- The vision is not communicated effectively.

- The vision is not communicated widely enough.

- The relevance of the new goals for individuals and their work is not communicated.

- The change process is not communicated.

More→	Communicator	Communicator/ Change Ambassador	Change Ambassador	
	Communicator/ Stability Seeker	Balanced Mix of Interacting and Adapting	Change Ambassador/ Adjuster	
←Less	**Stability Seeker**	**Stability Seeker/ Adjuster**	**Adjuster**	

Interacting & Presenting (vertical axis, Transformational)

Adapting & Coping: ←Less ... More→ (Transactional)

Gaining Support: The people domain

The next step in the process involves gaining other people's support by motivating and empowering them to implement the actions needed to deliver the strategy. The vision and goals may have been communicated well but without actions in place that ensure that these are delivered, there is a high risk that the implementation of the strategy and specific goals will fail. The impact of such a failure is partly determined by the scope of the leader. For example, if the CEO does not take adequate steps that ensure that the strategy is implemented, consequences are likely to far reaching. If a project or department leaders do not get their teams on board to deliver the required actions, projects can fail which in turn may affect other parts of the business (e.g. not delivering improvements to IT infrastructure which enable faster client sales).
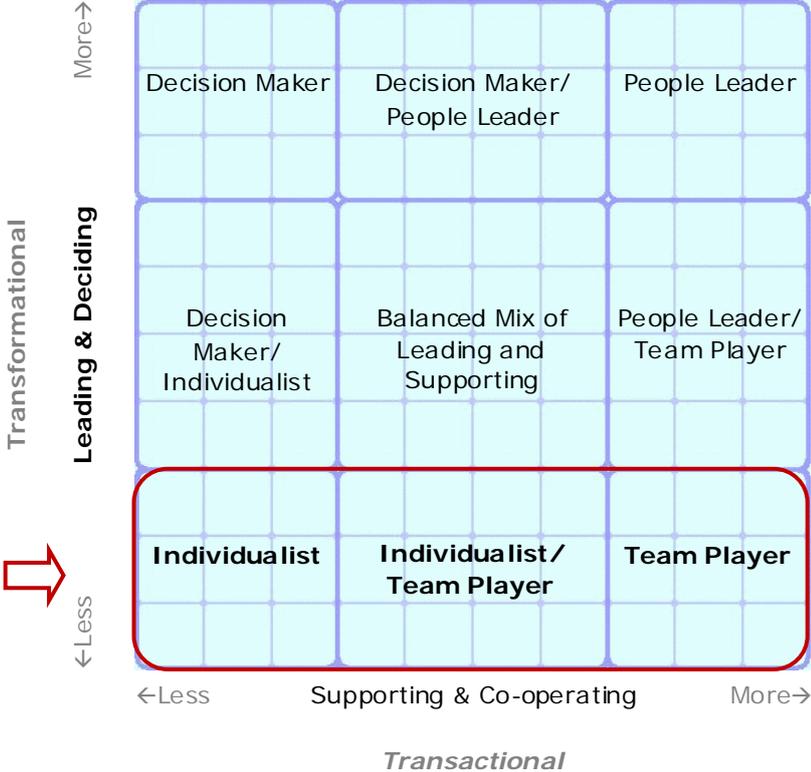
Gaining support requires working together with people from different areas in the organisation to implement the changes. **Low scores on *Supporting & Co-operating*** can be a potential obstacle in that people may not be provided with sufficient support and assistance during the change process. Example scenarios include:

- Methods for dealing with individuals who resist the change are ineffective.

- Decisions are made without considering the impact on others and getting buy-in from important people in the change process.

- There are no quick wins in the change process and prolonged collaboration with others is required, but collaboration proves ineffective as people are not sufficiently consulted and listened to.
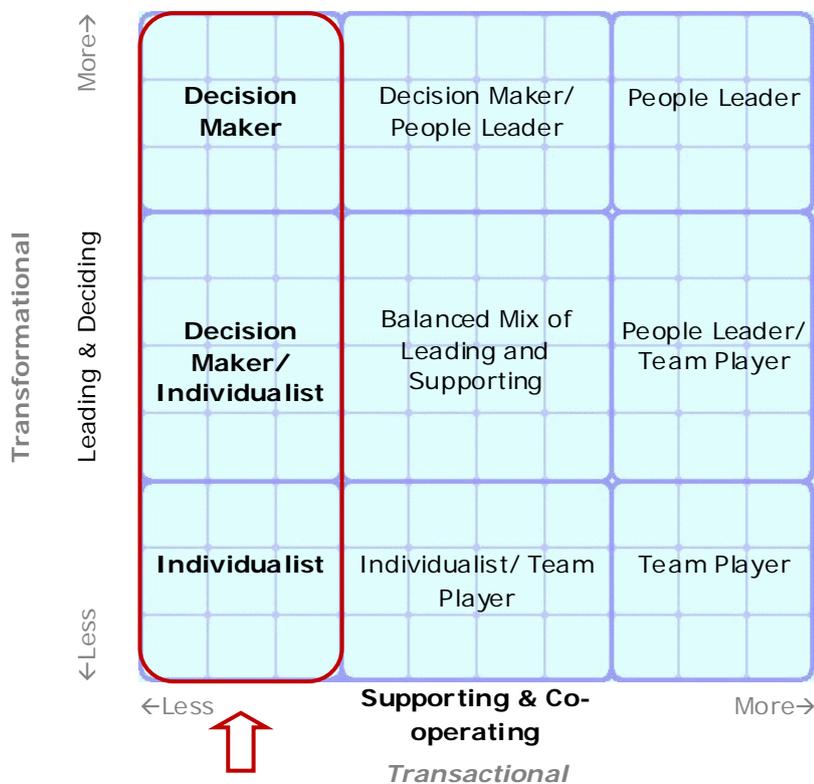
Gaining support also involves taking responsibility for actions and projects as well as empowering and motivating others to implement the required changes. **Low scores on *Leading & Deciding*** may cause some risks in that process.

- Line management are not adequately involved in implementation.

- Old structures and obstacles which block change are left in place. These would pose a challenge for any leadership but a reluctance to make decisions would make it even more difficult to deal with old structures and obstacles.

- Decisions required to drive the change process and implement the strategy are not taken.

	Decision Maker	Decision Maker/ People Leader	People Leader
Leading & Deciding	Decision Maker/ Individualist	Balanced Mix of Leading and Supporting	People Leader/ Team Player
	Individualist	**Individualist/ Team Player**	**Team Player**

Transformational (vertical axis label, More↑ / Less↓)

←Less   Supporting & Co-operating   More→

Transactional

Delivering Success: The operations domain

Delivering success involves using operational efficiency and commercial acumen to effectively implement the strategy (Operations). Failure to implement the organizational strategy can prevent growing the organization or winning business. At the team or departmental level potential consequences are unsuccessful delivery of projects which support or help the business to grow or enhance the capability of staff to increase business.

Organising & Executing is important for delivering success by planning ahead, and working in a systematic and organized manner. The following examples outline some potential risks entailed by **low scores on *Organising & Executing***:

- The change process is terminated before the change has become consolidated as operations are not followed through to completion.

- Changes do not become embedded within new organizational norms and values.

- The need for 'course corrections' is not appreciated as progress is not monitored and the change process gets pushed off course.
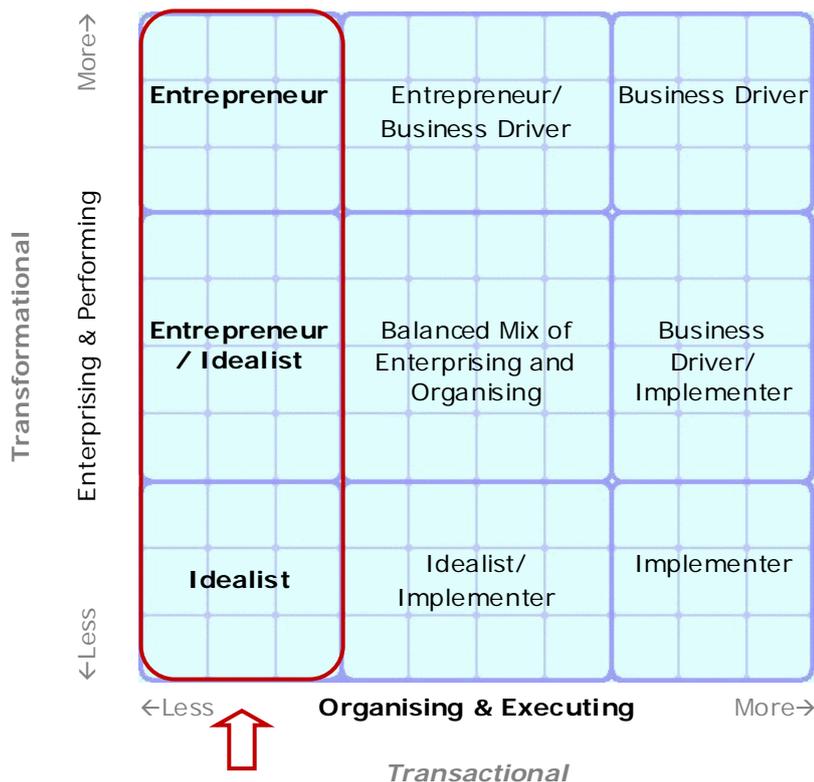
Delivering success also involves mastering challenging goals and implementing the strategy with business acumen. Potential risks associated with **low scores on Enterprising & Performing** are:

- In the implementation of the strategy potential commercial opportunities are overlooked.

- Stretching goals that increase organizational revenue, project success or developing internal talent are avoided.