



# CI PROFILING INC.

505 East Hawley Street, Suite 150 · Mundelein, IL 60060 · (847) 970-9119 · Fax (847) 970-94

## PROFILE INVENTORY: PERSONAL THEMES

### Self-Directed Motivation: 9.00

Self-Acknowledgement: \*\*\*\*\*  
 Need for Autonomy: \*\*\*\*\*  
 Need for Money: \*\*\*\*  
 Need for Recognition: \*\*\*  
 Competition vs Goals: \*\*\*\*\*  
 Competition vs Others: \*\*\*\*\*

### Personal Integration: 8.00

Self-Awareness: \*\*\*\*  
 Career Direction: \*\*\*\*

### Conceptual Skills: 8.50

Learning: \*\*\*\*  
 Overview: \*\*\*\*\*  
 Problem Solving: \*\*\*\*  
 Innovation: \*\*\*\*

### Assertiveness: 9.00

Tenacity: \*\*\*\*\*  
 Voicing Opinions: \*\*\*\*\*  
 Handling Confrontation: \*\*\*\*\*

### Work Focus: 7.00

Energy/Intensity: \*\*\*\*  
 Time Management: \*\*\*  
 Detail Management: \*\*\*\*  
 Prioritization: \*\*\*

### Other-Directed Motivation: 8.50

Commitment to Team: \*\*\*\*  
 Commitment to Company: \*\*\*\*  
 Commitment to Customer: \*\*\*\*  
 Creating Value: \*\*\*\*\*

### Professional Focus: 8.00

Technical Mastery: \*\*\*\*  
 Inquisitiveness: \*\*\*\*

### Planning: 7.00

Tactical Focus: \*\*\*\*  
 Project Management: \*\*\*  
 Use of Resources: \*\*\*\*

### Relationships: 7.50

Approachability: \*\*\*  
 Affiliation: \*\*\*\*  
 Empathy: \*\*\*\*

### Communications: 6.50

Verbal: \*\*\*\*  
 Listening: \*\*\*  
 Persuasiveness: \*\*\*

**Key:**

Impact Evidence:	Ratings:
***** - Dominant	7-10 - Strength
**** - Strong	4-6.9 - Operational
*** - Average	1-3.9 - Development Need
** - Limited	
* - Counter	

**Name:** Terry Wakefield  
**Company:** Customers Forever  
**Date:** December 21, 1998



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## PROFILE INVENTORY: MANAGEMENT THEMES

LEADERSHIP		DRIVE FOR RESULTS	
Individualized Focus:	6.00	Setting Goals:	8.50
Directing Others:	8.50	Attaining Goals:	9.00
Influencing Others:	7.00	Evaluating Performance:	6.50
Motivating Others:	7.00	Company Overview:	8.50
Involving Others:	6.00		
ORGANIZATIONAL SKILLS		DECISION MAKING	
Strategic Planning:	9.00	Analytical Process:	7.00
Resource Management:	5.50	Flexibility:	6.50
Delegation:	5.50	Accountability:	8.50
TEAM BUILDING SKILLS			
Selecting Personnel:	6.00		
Developing Personnel:	4.50		
Relations with Others:	6.50		
Maintaining Morale:	7.00		

**Key:**

Ratings:  
 7-10 - Strength  
 4-6.9 - Operational  
 1-3.9 - Development Need

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## PROFILE INVENTORY: PERSONAL THEMES

	1	2	3	4	5	6	7	8	9	10				
<b>Self-Directed Motivation:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Personal Integration:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Conceptual Skills:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Assertiveness:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Work Focus:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Other-Directed Motivation:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Professional Focus:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Planning:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Relationships:</b>	*	*	*	*	*	*	*	*	*	*				
<b>Communications:</b>	*	*	*	*	*	*	*	*	*	*				

**PERFORMANCE RANGE**

**Name:** Terry Wakefield  
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## PROFILE INVENTORY: MANAGEMENT THEMES

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Individualized Focus:	****	*****	*****	*****	*****	*****	*****	*****		
Directing Others:	****	*****	*****	*****	*****	*****	*****	*****	*****	
Influencing Others:	****	*****	*****	*****	*****	*****	*****	*****	*****	
Motivating Others:	****	*****	*****	*****	*****	*****	*****	*****		
Involving Others:	****	*****	*****	*****	*****	*****	*****	*****		
Setting Goals:	****	*****	*****	*****	*****	*****	*****	*****	*****	
Attaining Goals:	****	*****	*****	*****	*****	*****	*****	*****	*****	
Evaluating Performance:	****	*****	*****	*****	*****	*****	*****	*****		
Company Overview:	****	*****	*****	*****	*****	*****	*****	*****	*****	
Strategic Planning:	****	*****	*****	*****	*****	*****	*****	*****	*****	
Resource Management:	****	*****	*****	*****	*****	*****	*****	*****		
Delegation:	****	*****	*****	*****	*****	*****	*****	*****		
Analytical Process:	****	*****	*****	*****	*****	*****	*****	*****		
Flexibility:	****	*****	*****	*****	*****	*****	*****	*****		
Accountability:	****	*****	*****	*****	*****	*****	*****	*****	*****	
Selecting Personnel:	****	*****	*****	*****	*****	*****	*****	*****		
Developing Personnel:	****	*****	*****	*****	*****	*****	*****	*****		
Relations with Others:	****	*****	*****	*****	*****	*****	*****	*****		
Maintaining Morale:	****	*****	*****	*****	*****	*****	*****	*****		

1 2 3 4 5 6 7 8 9 10

 PERFORMANCE RANGE

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## RANKING OF MANAGEMENT STYLES

### Customers Forever

#### Terry Wakefield



The above graphic displays the positive-evidence ratios of closely-linked management practices which have been bundled into five primary leadership “styles”:

- Commander** - Emphasis on Driving Goals, Decisions, and Outcomes
- Visionary** - Emphasis on Strategy, Innovation and Communications
- Orchestrator** - Emphasis on Plan, Process, Metrics, and Measurements
- Cultivator** - Emphasis on Building People and Organizational Capabilities
- Relator** - Emphasis on Human Dimension, Positive Morale, Team Spirit

The relative positioning on the stackgraph usually has three implications:

- Level One** - “Signature” package, primary driver of choice and priority, most often rooted in core motivations and behaviors
- Level Two** - Support practices that are most consistently evident as a means of complementing or implementing the primary style
- Level Five** - Least frequency of evidence; practices here often give way to the priorities of the above factors

# THE INTERPRETATION OF STATISTICAL DATA

Contained in this report is a series of numerical ratings, scales, graphs, etc. that quantify the profile indicators and/or study results. To interpret such findings properly, the following principles of the CI system must serve as a frame of reference:

## CRITICAL INCIDENCE:

The entire quotient of a set of interview responses is evaluated for all critical incidence or positive evidence of the target behaviors and capabilities. The resulting ratings represent the percentage of positive response that is surfaced for each of these dimensions. Thus, if ten questions are targeted at the *Assertiveness* theme, and the interviewee gave specific evidence of assertive behavior in seven instances, the rating for that theme would be 7.0, representing a critical incidence factor of 70%.

## STATISTICAL SIGNIFICANCE:

While at first glance many of the differentials may appear as minimal, this must be viewed in context of a percentile rating system. Thus the variant of a 5.6 to a 7.0 represents a full 14 points on a 100-point scale or a 20% differential in positive evidence for that particular dimension.

## THE 1-10 SCALE:

This scale has been developed against the entire CI data base and is designed to relate specific critical incidence indicators to the functional impact of a given behavior or capability. The following parameters apply:

- **DOMINANT STRENGTHS (7.0 TO 10.0)**  
The most evident factors indicated at so strong a level that they will be recognized as the “signature” impact of an individual or a group.
- **OPERATIONAL STRENGTHS (4.0 TO 6.9)**  
Supportive skills for overall effectiveness. The degree to which the trait is more or less evident is reflected by the wide range in this category.
- **LIMITING FACTORS (1.0 to 3.9)**  
A specific restraint or obstacle to overall effectiveness; diminished evidence suggest these as deficiencies and potential impediments to successful performance.

# PERSONAL THEME DESCRIPTIONS

## SELF-DIRECTED MOTIVATION

- Evidence of personal pride and self-confidence
- Demands recognition, autonomy, distinction and reward
- Rejects jobs that guarantee safety and security
- Prefers to work among entrepreneurs, risk takers and top achievers
- Driven by the measurement of results
- Enjoys competing head-to-head against others
- Works hard to surpass own best performance

## OTHER-DIRECTED MOTIVATION

- Founded upon a set of standards that enables one to remain uncompromised in matters of honesty and integrity
- Employs “fair practices” when doing business
- Demonstrates a sense of commitment and contribution to customers & stakeholders
- Makes every effort to protect the interests of the team and the company

## PERSONAL INTEGRATION

- Maturity founded upon introspection, internalized self-awareness, modeling
- Priority and plan for ongoing personal and professional development

## CONCEPTUAL SKILLS

- Quick learning capabilities
- Demonstrates an understanding of the “big picture”
- Thorough diligence in searching out the parameters of a problem or a decision
- Often applies unique and innovative solutions to problems

## ASSERTIVENESS

- Able to take charge of a situation
- Readily voices an opinion or advocates a position
- Defends point of view when challenged
- Does not back down in conflict situations

## WORK FOCUS

- Displays a high level of personal intensity/energy
- Pays attention to details and takes an organized approach to work
- Takes a systematic approach to setting priorities and managing time

## PLANNING

- Sets thorough, realistic short-term plans
- Takes a systematic approach to managing projects to completion
- Knows available resources and uses them effectively

## RELATIONSHIPS

- Establishes positive relationships: peers, subordinates, managers, customers
- Demonstrates empathy and sensitivity toward others

## COMMUNICATIONS

- Able to communicate effectively with others on all levels (formal/informal, small/large groups)
- Demonstrates good listening skills
- Uses interactive communications to persuade others to a desired outcome



# THE BEHAVIORS AND SKILLS OF SUCCESSFUL MANAGERS

## LEADERSHIP SKILLS

### 1.) INDIVIDUALIZED FOCUS

The skillful manager learns that a keen appreciation of the needs, talents and skills of each individual direct report is vital. This capability is built on a careful discovery effort with each employee, then applying the resulting insights into a personalized management strategy.

### 2.) DIRECTING OTHERS

The effective manager must be capable of exercising control over the members of the team. The courage and capability to enforce compliance and impose “hard” decisions is a critical component of managerial success.

### 3.) INFLUENCING OTHERS

While it is often necessary to give orders, it is frequently just as important to induce cooperation and buy-in. The effective manager understands the need to sell employees on taking ownership for their efforts, and knows that this often is best accomplished by communication and persuasion rather than by mandate.

### 4.) MOTIVATING OTHERS

The truly inspirational manager is far more than simply a “head cheerleader”. Such a manager perceives the needs and motivations of each employee as well as those of the full team and translates that understanding into actions that will serve to stimulate the growth and productivity of all.

### 5.) INVOLVING OTHERS

A manager will quickly lose effectiveness if all transactions are presented in a top→down mode. Whenever possible, the good leader includes others in the process of setting goals and directions. This level of participation will result in a broader perspective and a deeper commitment from the entire team.





## **DRIVE FOR RESULTS**

### **1.) SETTING GOALS**

One of the most fundamental tasks of a manager is the framing of performance targets for the unit. While it is imperative that these be tangible goals, measurable through consistent standards, it is equally vital that these be realistic – requiring employees to stretch their capabilities, but not so unreasonable that failure is almost inevitable.

### **2.) ATTAINING GOALS**

Once goals have been established, the successful manager monitors progress and performance through a defined tracking system. The team is kept aware of its status vs. deadlines and deliverables. Obstacles to goal attainment are quickly identified with appropriate countermeasures put in place.

### **3.) EVALUATING PERFORMANCE**

Formal reviews are leveraged into a careful examination of current performance, next-step development, and overall career potential. Total performance is measured not only by the hard data but also by the more intangible contributions made to the success of the unit and the company.

### **4.) COMPANY OVERVIEW**

Today's effective manager must be aware of and aligned with the total company and business environment. This includes the capability to build working collaborations with other departments and business units to achieve best-case outcomes and maximize impact on customer value and company value.

## **ORGANIZATIONAL SKILLS**

### **1.) STRATEGIC PLANNING**

Managers at every level expand their effectiveness by becoming familiar with the long-term business plan of the company so that local department goals and day-to-day decisions are consistent with this vision. As executives advance to senior level roles, they will increasingly need to become the architects of this strategic vision.

### **2.) RESOURCE MANAGEMENT**

The capable resource manager will incorporate “best-practices” approaches that allow information and financial systems to be tracked and updated, with key trends readily identified, updated, and managed. Such factors as managing-to-budget and implementing a human resource plan also link to this dimension.

### **3.) DELEGATION**

This skill often appears most prominently at higher executive levels. These leaders have discovered the immense value of delegating important assignments to appropriate people on their teams, thus leveraging executive time for most-critical pursuits while, concurrently, enlarging the overall strength and capability of the unit.



## DECISION-MAKING

### 1.) ANALYTICAL PROCESS

Good decision-making requires a dedicated search for all applicable information as well as a critical-thinking approach to assess alternatives and likely impact. Instinct and intuition sometimes play a role, but rarely as the sole trigger of an important decision.

### 2.) FLEXIBILITY

Some managers fall victim to untested assumptions and to solutions “that worked in the past”. In contrast, *Flexibility* is characteristic of those who seek out opinion and perspective from multiple sources, always looking for those unique factors that may spell the difference between a good and a bad decision.

### 3.) ACCOUNTABILITY

Ultimately a decision requires decisiveness, someone who will step up with a timely and an unambiguous decision. Required here is the sense of bottom-line ownership over an assigned responsibility and the willingness to stand by the outcomes that result from serving in this leadership role.

## TEAM BUILDING SKILLS

### 1.) SELECTING PERSONNEL

One of the major tasks facing every manager is the recruitment and selection of the team. The skillful manager uses a consistent process to identify all the aspects of a hiring model, then probes and explores the motivations, talents and ambitions of candidates as these relate to that model.

### 2.) DEVELOPING PERSONNEL

Most every manager must assume a teacher-mentor role for the unit. Coaching practices are installed throughout the organization and the manager shows ongoing priority for personally cultivating direct reports toward future advancement. High-evidence practices include formal succession planning and high-potential initiatives.

### 3.) RELATIONS WITH OTHERS

Good personal relationships with associates support the manager in building good rapport and proximity with the immediate team. Leaders who remain aloof from subordinates risk the creation of barriers that impede the flow of information and understanding.

### 4.) MAINTAINING MORALE

Employees become fully engaged when their work environment reflects such elements as respect, collegiality, good comradeship, and a shared sense of purpose. Effective leaders are sensitive to these dynamics and will manage the climate through success and celebration as well as through conflict and adversity.

