



S A M P L E

Management Report

for

Susan Sample

This Sample Report provided by

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Management Report

This Management Report provides you, the supervisor, with information concerning Susan's significant behavioral tendencies and preferred style of performing her job. You will also get a good picture of her potential for growth and development within your organization.

This report has the following sections:

- **A Summary of Primary Behavioral Tendencies**
A description of this employee's typical behaviors with regard to productivity, quality of work, initiative, teamwork, and problem solving.
- **Suggestions for Increased Effectiveness**
This employee's job performance may be improved through behavior modification. Several suggestions are offered in this section that may be helpful for coaching and managing.
- **Response to Job-Related Stress, Frustration, and/or Conflict**
A description of behaviors you are likely to expect from this employee in times of both normal and excessive periods of stress, frustration, and/or conflict.
- **Work Motivation**
A description of the factors that are likely to be most effective in motivating this employee.
- **Motivational Energy**
This section describes the intensity this employee brings to the job and alerts you to opportunities for providing leadership to improve work performance.

Please consult the User's Guide for additional information on using these results.

A SUMMARY OF PRIMARY BEHAVIORAL TENDENCIES

This section of the report summarizes Susan's typical behavioral tendencies with regard to five critical job-related components. The purpose of this information is to help you to identify and make full use of Susan's strengths, and to help her to manage those areas that might be limiting her effectiveness.

I – Productivity

- She can become critical of others who do not share her sense of urgency.
- She challenges others to do their very best.
- Self-motivated, she stays on the move.
- Often, Susan sets goals which are difficult to reach.
- She is difficult to satisfy.
- She tends to avoid spending time on small talk and social amenities.
- When time passes without getting much accomplished, she may experience frustration.
- She subscribes to the idea that time is a resource not to be wasted.

II – Quality of Work

- She is capable of producing good quality work; however, she tends to be more results-oriented than process-oriented.
- Though she is decisive and quick to take action, Susan has a casual interest in details and routine tasks.
- Preferring to concentrate on overall concepts, she de-emphasizes or delegates detail work.
- She prefers to take short cuts whenever possible.
- She has only a moderate interest in exactness and detail work.

III – Initiative

- She will pursue an opportunity in an aggressive and independent manner.
- As a self-starter, she will take independent action.
- She is capable of expressing a sense of urgency for others to act now.
- Susan accepts responsibility for her actions.
- Capable of assessing a situation, she can take action when required.
- She is inclined to take on new responsibilities.

IV – Teamwork

- Concerned with the importance of each person's contribution to the attainment of overall objectives, she believes that if everyone does their job individually, the team's success is assured.
- With a strong need to control, she can steer the course of what is happening, the direction of events, and the final result.
- Preferring direct and to the point communication with team members, she will not spend much time on social small talk.
- She prefers self-motivated, self-directed team members.
- Tending to relate to individual needs, she will encourage individual expression.
- She is generally effective working in groups.
- Usually, she participates in group problem solving efforts.

V – Problem Solving

- She pursues problems with a sense of urgency.
- Decisive and self-assured, Susan has a tendency to make quick decisions.
- She can become impatient with the view that "We've been doing this for the last ten years, so why should we change?"
- Simple, practical, and easy to follow instructions are preferred.
- She is inclined to challenge the status quo.
- She is likely to stress pragmatic approaches based on common sense and practical experience.

SUGGESTIONS FOR INCREASED EFFECTIVENESS

This section relates to some behavioral tendencies that Susan might want to modify or improve. The significance of these behavioral tendencies takes on meaning as they are related to her current position, career and/or personal goals.

I – Productivity

- Realize that others may need time to adjust to her quick decision-making style.
- Do not lose sight of the long run in her attempts to get immediate results.
- Recognize the need for solid thinking about implementation with the support necessary to reach challenging goals.
- Accept the fact that others may not be as focused as she is.
- Try to be more selective when considering which new tasks to take on and learn to say no.
- Guard against becoming so involved and motivated that she sets overly optimistic goals.

II – Quality of Work

- Take the time to work out the steps in a process in writing before beginning a project.
- Susan might produce higher quality work if she were more consistent in attending to critical details.
- Recognize that additional time spent in checking the small details will be well spent.
- Try to split up large tasks into smaller tasks with separate deadlines and quality checkpoints. This will enable her to manage time more efficiently and ensure quality in each step of the process.
- If appropriate, let it sit overnight. With a fresh outlook the next day, Susan might be able to spot inconsistencies, errors or defects that would have otherwise slipped by her.

III – Initiative

- Try not to force action when there is no need to do so.
- Understand that often the established way of doing things is based on solid reason; be aware that sanctions may exist.
- Learn to pace herself better; know when and how to relax.
- Think before she takes action. Consider all options and the likely outcomes of each option before going with her first option.
- Show an interest in co-workers' personal interests.

IV – Teamwork

- Listen to, and be considerate of, the thoughts, feelings and experiences of others.
- Understand other points of view before she speaks. Let other team members finish a point before she makes a counterpoint.
- Try to develop more informal relationships at work so that when Susan is in a group situation she will already be comfortable with the participants.
- Be willing to delay her individual work to assist others with high priority group projects.
- Spend more time explaining her reasoning process rather than just announcing conclusions.
- Susan might improve the comfort level of team members and the flow of productive ideas by showing greater sensitivity to other viewpoints.
- Maintain greater objectivity in assessing situations and be more willing to adjust her approach to meet team objectives.
- Consider how she might operate so as to get the benefit of group performance.
- Negotiate desired outcomes on a win/win basis instead of a win/lose basis.
- Practice becoming more of a team player.

V – Problem Solving

- Avoid sharp criticism of others.
- Involve others more in the decision making process.
- Susan may become a better problem solver if she takes the time to identify the underlying issues.
- Use other people's experience. Listen to other's opinions, especially those who are on the front lines of an issue.
- Focus your thinking directly on the relevant issues of a problem.
- Talk to people with varied backgrounds to get different perspectives on the same problem. Make more contacts outside her immediate work group or business area.
- Try to understand all levels of a situation by getting input from others.

RESPONSE TO JOB-RELATED STRESS, FRUSTRATION AND/OR CONFLICT

When experiencing stress, frustration and/or conflict in a job setting, Susan may:

- Become self-reliant, rely on her own strengths and capabilities.
- Become decisive, self-assured and bold.
- Take a direct, aggressive approach; get straight to the point.
- Persist in following up with others until a clear-cut decision is made.
- Accept the risk of change and uncertainty.
- Be quick to respond to emergencies and resolve problems.
- Move in quickly and seize an opportunity or create one.

If, however, the level of stress, frustration and/or conflict becomes intense and/or continues over an extended period of time, there may be a tendency to:

- Become impatient, critical and faultfinding.
- Become autocratic, extremely demanding and push people rather than lead them.
- Act recklessly, become inattentive to critical details and important routine tasks.
- Sacrifice thought for action and may overwhelm others with a feeling of emergency.
- Become defensive; make others feel defensive.
- Try to get the desired result too soon, not waiting for the right moment.
- Dominate and cut off the expression of important ideas by others.
- Act with a lack of tact and diplomacy.

WORK MOTIVATION

This section of the report describes the different types of incentives, rewards and conditions that are most compatible with Susan's behavioral tendencies and motivational style. In motivating her, consider providing:

- New challenges in areas of interest that are a real test of abilities.
- The opportunity to be first, number one; to be the best.
- Freedom from controls, close supervision and organizational constraints.
- A high sense of urgency, pressures, critical deadlines.
- The opportunity to make decisions.
- Opportunity to solve challenging problems.
- Power and authority.
- Status and money.
- Situations where she is held accountable solely for results rather than for how the results are achieved.
- Opportunities for personal accomplishments, more responsibility.
- Short term goals, immediate results.

MOTIVATIONAL ENERGY

Motivational Energy (ME) reflects the intensity that an individual shows and how she approaches most situations. Susan's ME indicates that she will approach most situations with a moderate intensity and suggests that she might be inclined to show one or more of the following behavioral tendencies:

- Because Susan may invest intense energy into many directions simultaneously, she can become over-extended at the expense of effectiveness.
- Susan can overuse a position of power and authority without careful regard for others.
- When acknowledging and recommending employees, she may emphasize individual accomplishments over group contributions. As a result, unproductive competition among team members might increase while team efforts suffer.
- While capable of making good decisions, she may not always use a systematic approach. By rushing important decisions, she will sometimes miss some important information or forget to involve key persons.
- Although typically effective at making decisions, she could improve the accuracy of some decisions by identifying the most difficult problems and spending more time on the targeted resolution.
- Preferring a quick pace, variety, new challenges and opportunities, she might not pay enough attention to the continued success of more long-term, ongoing projects.
- Sometimes, she is impatient with the view that "We've been doing this for the last ten years, so why should we change?"
- Having shown the ability to solve problems, she sometimes acts before identifying the underlying cause.
- Generally, Susan makes decisions in a timely manner, however, occasionally she may rush an important decision before considering all the available information.
- Although capable of producing good quality work, she may show limited attention to details and accuracy.