



ABC COMPANY



Executive Summary

Bob Sample

Region VP Sales, Commercial

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Partnering With You to Drive Organizational Effectiveness

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POLICY GUIDELINES FOR PERSONNEL ASSESSMENTS

This assessment is designed for use by persons familiar with its compact presentation of information and with its language. To be helpful, this report must be read and applied carefully. Its purpose is to evaluate personnel on important work-related personality factors to aid in the individual's placement, growth, and development. It is only one source of information. It should be used to clarify and confirm other legitimate observations. The statements it contains should be viewed as hypothesis to be validated against other sources of data such as interviews, work history, background checks, biographical data, and other assessment results. This report should not be the sole basis for denying employment or promotion.

This assessment is confidential. It is not intended to be used for candidate or employee feedback. Therefore we request that you:

Share this report only with those who have demonstrated a need to know the results.

Never quote from it or show it to the individual concerned. It can be very helpful for the candidate/employee to receive feedback about this report. However, this information should be provided by the person who conducted the evaluation.

Never reproduce any or all of this report. It is submitted in the strictest of confidence. After review it should be returned to the special file established as a location for these reports.

Please keep in mind the date on which this was written. People do change over time. Personality data is of questionable validity one to two years after it was obtained.

Please call if you have any questions or if you would like to discuss our observations further.

Rick Tiemann
President

SYNOPSIS

Mr. Sample has strong degree of reasoning and problem solving ability. He possesses a prudent, practical style and shows good judgment. He is intellectually capable of solving problems and making sound decisions. He reasons through things quite well and picks up on things quickly. He shows a predictable style of management which at times may lack the spontaneity and creativity that will drive exponential change but always engages with the people of the organization and communicates with everyone.

A mature individual with a more serious demeanor than most people, he tends to be a realist in terms of evaluating situations and not allowing things to get too far off track. His serious demeanor may prohibit him from energizing the organization when areas of the business need a fast start, a strong kick off or perhaps a jump start. He is not one who is into hype as he prefers a logically based approach. He is a warm, engaging person who builds relationships first and foremost, networks, and gets things done through people. He allows people flexibility and autonomy to perform their roles, perhaps to a fault. Having what appears to be a facilitative and hands off approach he likely gets caught off guard when those he trusted to accomplish the task do not follow through.

He is steady and consistent, not flashy or flamboyant, but he does like to be in positions of influence that allow him to direct things and be highly visible. He thoroughly evaluates situations and maintains a constant composure through change. He is uncomfortable shooting from the hip as he would prefer to take well thought out, calculated risks. He is not one to shake the tree to see what falls out. He prefers to work through people and issues in a practical, well thought out way.

He is a facilitator, not a driver. His focus is on the details, the structure and process in which things operate. Most likely, he will not be the one who

drives it but the one who oversees it. He remains calm and even keeled and is accepting of other people, perhaps to a fault. He possesses a balanced ego and seems to have a fairly good handle on how to work with and through people. He is inclined to get mired in the details, but is not one who necessarily tacks out the details himself. He may use more of a numbers and analytically driven process to come to conclusions and make decisions. He likes to work through people, but because he gives them autonomy and flexibility to perform their roles, he may not be comfortable or possess the sense of urgency required to push or drive them.

There is an element of assertiveness that emerges when he is stressed or under pressure. This suggests he can become more assertive and directing when necessary but he describes himself on his self assessment as someone who works with and through people.

The question from my perspective is not "is this person capable of managing the role?", because it appears he is. Instead the question is; are we "hiring in the cycle?" He has lead at higher levels in other organizations than what this role requires so the question becomes, does he really want to get back into the day to day role of directing a sales force? And if so, what is his driving force given that this is an industry change and he ran his own business earlier in his career.

STRENGTHS

Intellectually and analytically strong

Seasoned and experienced

People person

Articulate

Engaging

Focused

Practical and pragmatic

Conscientious

POSSIBLE LIMITATIONS

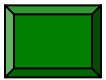
Overly trusting and accepting of others

May lack spontaneity at times

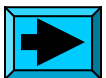
May not push the envelop and get into trenches

May not challenge certain situations where relationships are critical

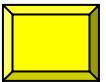
RECOMMENDATIONS



A. "Recommend". See good fit between the individual's experience and the expectations of the role.



B. "Recommend with some reservations". See a level of potential in the individual with specific areas of development to address. (Specifically the Hiring in the Cycle comments)



C. "Cautious about recommending". Not enough to disqualify but have clear questions and see a higher degree of potential risk.



D. "Do not recommend". Have reservations and concerns that experience and/or limitations do not appear to be in alignment with job expectations and may be too much to over come.

Note: Recommendations are based solely on assessment data and should be treated as an additional source of information when making a hiring decision. Please refer to Policy Guidelines on page 2 of this report.

AREAS FOR DEVELOPMENT

- Given the types of roles and responsibilities he has had he may have learned ways to manage this but if he has not learned to have those difficult conversations due to his highly personable nature, bolstering his presence with learning to be more assertive and thick skinned when needed would help him to address conflict and delicate personnel situations more quickly and comfortably. **Developing Positive Assertiveness** by Sam Lloyd, **Your Perfect Right** by Robert Alberti or **How to Have Confidence and Power in Dealing with People** by Leslie Giblin are excellent resources.
- To help him learn to speak up and manage difficult conversations or conflict more comfortably, reading **Crucial Conversations** by Kerry Patterson, or **Verbal Judo** by George J. Thompson and Jerry B. Jenkins would help him learn more about controlling the conversation and thinking on his feet in situations where he is uncomfortable.
- Because he has a high need to make friends and engage others he may have difficulty reprimanding and holding people accountable if he has a strong relationship with them. In addition, with his collaborative and trusting nature, reading the book **The Accountability Revolution** by Mark Samuel can help him be more effective.
- While he is a good individual in many ways, it may help him continue to enhance and develop himself professionally by reading, **The Four Obsessions of an Extraordinary Executive** by Patrick Lencioni. **The Ten Dumbest Mistakes that Smart People Make and How to Avoid Them** by Arthur Freeman and Rose DeWolf may provide him with some great principles to stay tuned into.