

<SAMPLE COMPANY>

TEAM ASSESSMENT REPORT



THE SCIENCE OF PERSONALITY

## **<ORG> <TEAM> TEAM ASSESSMENT REPORT**

The personality characteristics, behavioral tendencies, and work-related values of the <ORG> <TEAM> Team members contribute to the Team's effectiveness, ability to accomplish its strategic goals, capacity to interact productively with non-Team members, and the culture/climate that characterizes Team interactions. To provide Team members the opportunity to (a) gain self insight about their behavioral tendencies and values and (b) consider how their behaviors and values impact personal and team performance, all Team members completed the following three assessments:

**Hogan Personality Inventory (HPI).** The HPI is the industry standard for measuring personality as it relates to workplace performance; it has been used for 28 years to predict employee performance and help organizations reduce negative (and increase positive) performance indicators. The personal characteristics measured by the HPI impact how individuals approach work and interaction with others.

**Hogan Development Survey (HDS).** The HDS provides insight regarding eleven potential "derailers" that, when incited by stress, pressure, or boredom, are capable of impeding work relationships, adversely impacting leadership style, hindering productivity, and limiting overall career potential and effectiveness.

**Motives, Values, Preferences Inventory (MVPI).** The MVPI assesses an individual's core values and is used to (a) evaluate the fit between an individual's values and an organization's culture and (b) predict occupational success and satisfaction.

HPI, HDS, and MVPI results can help teams (and the individuals who comprise them) gain understanding and insight regarding the impression they make on others via their habitual response tendencies -- insight that can be used as a basis for goal setting, behavioral modification, and seeking accountability. Although the HPI and HDS provide insight regarding stable and automatic behavioral tendencies, these tendencies are amenable to modification if underpinned by self awareness and a strong commitment to personal development. Similarly, although individuals can't change their values (as measured by the MVPI), they can gain a level of appreciation for how values impact decision-making, actions, and perspective taking and strive to gain better understanding regarding alternate points of view.

The following pages (a) summarize the <TEAM> Team's typical approach to work and interacting with others and (b) shed light on the motivators and values that can impact how the Team makes decisions, interacts, and collaborates. These summaries are based on the Team's aggregate HPI, HDS, and MVPI results, presented in graphic form within the last few pages of this document. As a result of using the following document to gain insight regarding (a) how others interpret and appraise their behavioral tendencies and (b) the values that underlie their actions and reactions, the Team can proactively plan to modify their behaviors so that they are better aligned with their goals and objectives.

## DAY-TO-DAY APPROACH

The following sections highlight behavioral tendencies that characterize the <TEAM> Team's approach to work and interaction under routine conditions, as measured by the HPI. The Team's HPI results are presented graphically on pages 6 & 7.

**Shared Responsibility.** <TEAM> Team members likely are perceived as intensely hardworking but noncompetitive, modestly confident, and able to transition between leadership and individual contributor roles easily and contently. Although the Team's assessment results suggest that others would be hard pressed to describe the Team as easy-going or complacent, Team members will rarely (if ever) contribute to an overtly competitive or politicized work environment. Instead, they likely will lead by example (e.g., expect their actions to speak for themselves) and be unconcerned with inter-departmental or inter-organizational competition. Team members' desires to exceed their own personal standards versus compete with one another likely contributes to an environment in which individuals are rewarded for hard work and individual contributions; however, the Team may be viewed as unlikely to proactively seek to exercise their leadership authority outside their traditional arena of influence.

**Quality Control.** Members of the <TEAM> Team likely are described as realists who (a) do not view the work environment in an unrealistically-optimistic manner and (b) likely remain vigilant for errors, mistakes, or details that could potentially have a negative impact on performance or outcomes. Team members also are conscientious, highly attentive to detail, thorough, organized, and rule abiding. Some people may describe <TEAM> Team members as somewhat fault-finding or critical at times, but these tendencies are a natural extension of their strong orientation toward detail and thoroughness. Their proactive vigilance, ability to scrutinize their own and others' work to identify inconsistencies and inadvertent errors, and ability to focus on the concrete steps necessary to avert problems suggest that <TEAM> Team members emphasize quality, vigilance, and tend to strive to exceed their self-set standards.

**Conscientious.** In addition to possessing a strong level of vigilance and attention to detail, <TEAM> Team members likely are described as dependable, rule abiding, and trustworthy. Team members tend to take action only after considerable forethought and planning, and rarely, if ever, work around rules, act impulsively, or move forward without considering the downstream consequences. The Team likely is adept at creating detailed plans that account for various contingencies, closely overseeing multiple complex initiatives, and providing others the detailed and concrete instructions necessary to achieve their objectives. Team members expect a lot from themselves and others and consider timeliness, detail orientation, and responsibility as key virtues; however, if not monitored, these strengths may lead the Team to seem difficult to satisfy, rigid, or perfectionistic on occasion.

**Idea Formulation & Application.** The assessment results suggest that <TEAM> Team members have balanced strengths with respect to (a) creativity and pragmatism and (b) research and application. While some Team members excel at brainstorming, looking at issues from novel perspectives, and formulating strategies (but have minimal patience for and interest in concrete action planning), other team members have very pronounced abilities to refine "big-picture" ideas into workable solutions, translate ideas into concrete action plans, and consider the practical implications of ideas that sound good but may be unrealistic. On a similar note, while some Team members are very focused on learning via reading and research, others are more focused on learning via experimentation and hands-on approaches. To the extent that Team members recognize the benefits associated with their varying degrees of creativity and pragmatism *and* unique methods of learning and application, the Team will benefit from its members' diversity in these areas.

**Interaction Style.** Although Team members vary considerably in terms of the degree to which they seem to need and want social interaction, all likely are described as diplomatic, friendly, perceptive, and sensitive to others' feelings and reactions. Although some Team members initiate interaction more than others, all Team members likely are described as sensitive, nice, and empathic. While some Team members are prone to maintaining a lower profile, communicating when necessary, and listening more than driving conversations, other Team members demonstrate the exact opposite tendencies – they are very outgoing, talkative, and gregarious. The Team should explore the implications of the polarity that exists with respect to Team members' varying strengths involving listening, initiating interaction, and seeking out connections with others.

## **PRESSURE-PROMPTED RESPONSE TENDENCIES/POTENTIAL CHALLENGES**

When faced with adversity, most individuals rely on behavioral tendencies that, under routine conditions, facilitate their performance. These same tendencies are likely to emerge when individuals are bored, overtired, or not monitoring their actions and reactions closely. When exacerbated or used to an extreme degree; however, typically “helpful” behaviors can have less than desired consequences. The HDS was specifically designed to shed light on stress- and complacency-induced behavioral tendencies that, if not monitored, have the potential to lead to decrements in performance and degrade leadership effectiveness (see pages 8 & 9 for a graphic representation of the Team’s HDS results). In general, when several Team members demonstrate specific behavioral tendencies, the impact of those behaviors on decision making, interactions, and outcomes is amplified. The above being said, the Team will benefit from discussing the implications of the following:

***Eagerness to Please.*** The assessment results suggest that, on one hand, Team members likely are valued by their superiors because they (a) seek upward consensus before taking action and (b) demonstrate a strong degree of support and loyalty to their leaders’ initiatives. On the other hand, Team members may gain a reputation for devoting excessive time and energy to cultivating consensus, sacrificing their needs and viewpoints for others’, and, to others’ surprise, agreeing to terms that seem ideal for others but don’t seem ideal for the Team. Although Team members have strong perspectives and are capable of confidently defending their merits, they may be quick to downplay these strengths and seek unnecessary degrees of consensus when interacting with individuals they deem superiors. Leveraging Team members’ social insightfulness and diplomacy when these strengths will help cultivate relationships and minimize potential for conflict; however, ensure that these tendencies are kept in check when they have the potential to limit Team members’ ability to contribute their unique perspectives.

***Perfectionism.*** Although largely non-competitive, Team members set goals, hold themselves accountable to very lofty performance standards, and are very driven, achievement-oriented individuals. Although these characteristics promote high levels of performance, they are natural precursors to perfectionistic and potentially micromanaging tendencies. When faced with stressful or pressure-laden circumstances, Team members may struggle with prioritization, delegation, work-life balance, and, eventually, perhaps even burnout. Team members should challenge themselves to identify the specific instances in which perfection should be sought, but even more importantly they should identify instances in which it is not required. Because Team members have such strong standards regarding details and thoroughness, work produced based on less-than-maximal effort likely will still be appraised highly. The Team should exploit its members’ unique capabilities to draw on perfectionistic tendencies where appropriate while providing each other with the tactful feedback necessary to facilitate *moderated* use of these tendencies before they have unintended consequences.

***Skeptical.*** The assessment results suggest that, under the surface, Team members may be hesitant to fully trust others, their abilities, and true intentions; this propensity towards cynicism likely has roots in the Team members’ proneness to the perfectionistic performance standards described earlier. When faced with pressure, deadlines, etc., Team members may seem suspicious of others’ activities and intentions, less-than-subtly question “outsiders,” worry about others’ ulterior motives, and, overall, behave in ways that gives others the impression that they are not fully trusted. This dynamic has the potential to decrease morale both inside and outside of the Team. The Team’s tendency to mistrust others may also perpetuate Team members’ hesitancy towards delegation, which will negatively impact productivity and others’ ability to learn. Although the Team’s perceptive nature and lofty performance standards likely contributes to positive outcomes the vast majority of the time, the Team may occasionally spend more time “watching their backs” and pointing out problems than focusing on achieving positive outcomes.

***Accelerate vs. Decelerate.*** When faced with challenging circumstances, some Team members tend to accelerate their actions and abide by the perspective that “it is easier to ask for forgiveness than permission” while others tend to cautiously apply the brakes by procrastinating decision making in an effort to gather more data, make the safest decisions possible, and consider additional options and potential outcomes. On one hand, Team members’ varying tendencies to make decisions and take action quickly (but sometimes hastily) versus move forward with excessive care may effectively counterbalance one another. On the other hand, if Team members don’t invest effort in monitoring these tendencies and recognizing the benefits associated with moderated expression of these behaviors, inter-Team conflict may arise, particularly when consensus must be reached regarding plans for proceeding and timelines.

## PREDOMINANT VALUES

The following sections are based on the <TEAM> Team’s MVPI results (pages 10 & 11), a measure of values and driving/motivational forces. While motivations don’t necessarily *directly* impact behavioral tendencies, they can and do influence decisions, perspectives, and actions in many circumstances. Because predominant values impact (a) the issues and data leaders consider salient and important, (b) the matters to which leaders devote time and resources, and (c) the criteria by which leaders evaluate success, MVPI results can provide a firm foundation for productive conversation when “sticking points” arise, decisions must be made, and pros and cons associated with specific plans must be evaluated.

**Diversity.** Despite its size, <TEAM> Team members have a broad range of scores across many MVPI scales. This pattern suggests that individual Team members are motivated by a diverse set of interests and drivers, allowing each member to champion values that correspond to his/her particular role within the Team while also *not* providing a specific value that is motivating to all Team members. On one hand, the Team likely is receptive to wide-ranging viewpoints regarding the issues described below. On the other hand, the Team should (a) be aware of circumstances where values have the potential to work in opposition (and, for example, delay decision making) and (b) invest effort towards ensuring that values can, to the greatest extent possible, complement one another to create a work environment that allows the Team to accomplish its goals.

- Although some Team members derive considerable motivation from working with others in team-based environments, building relationships, and minimizing independent or solitary work, many tend to be rather indifferent towards social interaction at work, preferring instead to accomplish work independently and maintain a degree of autonomy (particularly when working on particularly challenging work).
- While some Team members are attuned to financial indicators and are motivated to thoroughly consider ROI, financial implications, cost/benefit ratios (etc.) prior to and during the course of decision making, other Team members tend to place less emphasis on financial-related considerations. Because indifference and lack of emphasis on specific motivators can have an equally-strong impact on actions and decisions as strongly-held values, Team members should proactively seek out and discuss each others’ unique perspectives related to finances.
- <TEAM> Team members have varying degrees of appreciation for structure, predictability, and minimization of risk. While some Team members value the role of process, structure, and thorough planning as it pertains to avoiding risk and ambiguity, other Team members may have less appreciation for these values or consider them stifling and oppressive. Team members’ varying perspectives on what constitutes risk likely will impact the manner in which opportunities are evaluated and pursued.
- While some Team members are eager to inject “fun” and lighthearted moments into the workplace and maintain a mentality that they “work to live,” other Team members consider work a place for seriousness and are content to seek “fun” outside the work environment. The Team should reflect on how the motivations described above impact the Team’s culture. Are Team members’ respective values regarding work-life balance and work-life “blend” acceptably accommodated?

**Alignment.** Although complete alignment around specific values is not evident in the <TEAM> Team’s MVPI results, the Team’s result suggest a relatively shared mentality regarding the following values:

- In general, Team members are not highly motivated to seek out or work in extremely high-profile roles that require them to (a) exert considerable authority and influence or (b) serve in highly visible roles within the organization. The Team is not highly motivated by opportunities to compete, leave their names or “mark” on things, or serve as spokespeople. They are content to work behind the scenes, don’t need considerable acknowledgement or praise, and tend to derive motivation from satisfying their own personal performance standards.
- Team members appear to share a preference for making decisions based on data as opposed to intuition and a motivation to look to numbers and research results as effective problem solving tools. Team members enjoy working with technology, analytical problem solving, and digging beneath surface “noise” to uncover the truth and likely are somewhat wary of solutions based on experience or logic that cannot be backed up by objective, verifiable, concrete data.

## RECOMMENDATIONS FOR TEAM SUCCESS

The preceding information can be used in a number of ways. First, Team members can capitalize on the self awareness gained as a result of the assessment process and identify behavioral tendencies they need to maintain, moderate, and grow to achieve their personal goals *and* contribute to the collective goals of the <TEAM> Team. Second, Team members should use the information contained within this document as a basis for discussion. After (a) identifying Team goals and impending challenges, (b) defining the reputation they want to create for the Team, and (c) the culture they want to build, contribute to, or maintain, <TEAM> Team can consider how their behavioral tendencies and work-related values contribute to (or in some cases, detract from) the preceding. If Team members (a) can gain greater awareness of their automatic behavioral tendencies, (b) support one another in leveraging specific behaviors and tempering others, and (c) have a foundation and common language for concretely discussing the preceding, their ability to collaborate effectively and produce results likely will be enhanced.

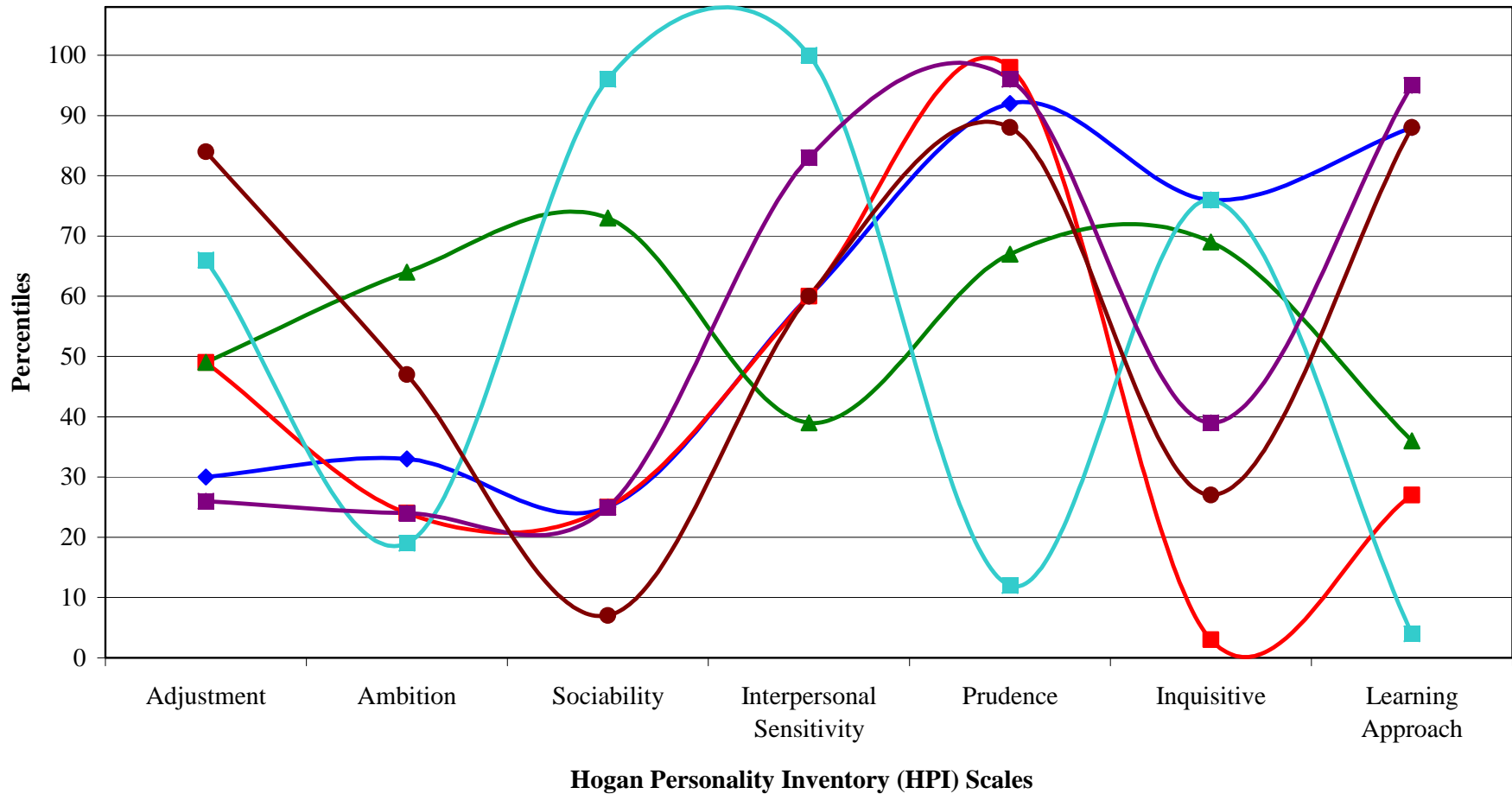
***Identify “Derailer Triggers.”*** In general, counterintuitive response tendencies tend to arise when individuals (a) are faced with stressful or pressure-laden work conditions or (b) become complacent (i.e., become so comfortable on the job that they stop monitoring themselves). One way to minimize the impact of naturally-occurring derailment tendencies involves identifying circumstances and scenarios that serve as “derailer triggers” for each Team member. Awareness of closely-affiliated colleagues’ derailers will help Team members support one another and enhance accountability and Team cohesiveness. Team members should discuss the ways in which they best can hold each other accountable for the individualized performance goals, which will promote transparency in performance standards and create a system of checks and balances. Attention should be paid to curtailing the tendency to set unrealistic or overly perfectionistic goals when attempting new behaviors.

***Perceived Strategic Focus.*** In general, most Team members are at least moderately tactically-focused, thorough, and detail oriented. Given the preceding, they should be able to capitalize on strengths associated with (a) creating comprehensive action plans and timelines and (b) adhering to plans, tracking progress against goals, and, if necessary, carefully adjusting their plans. Their strong operational focus; however, has the potential to detract from the degree to which they *seem* focused on strategy and the big picture (irrespective of the degree to which they actually are). The Team should strive to complement their strong outward focus on execution, operational matters, and tactical planning by (a) pushing themselves to communicate in strategic terms more frequently, particularly when interacting with non-Team members and (b) continuously aligning their tactical efforts to their bigger-picture performance goals.

***Fostering Trust & Delegation.*** Team members have difficulty trusting one another and can succumb to focusing primarily on the negative (i.e., why a plan will not work). Team members can do three things to combat these tendencies. First, the Team can channel their energy towards proactively identifying and finding flaws in organizational standard operating procedures. They should continue to objectively evaluate one another’s’ ideas by being vocal and straightforward about their opinions. Second, the Team should explore *why* they hesitate to offer others the benefit of the doubt before passing judgment. Finally, Team members should (a) recognize the discrepancy that often exists between stated intentions and actions and (b) devise strategies for effectively dealing with differences of opinion and conflict, and (c) be sure to use a direct and forthcoming (but still diplomatic) interaction style. In order to address the tendencies capable of negatively impacting the Team’s performance (described in this document), Team members will need to hold each other accountable in a direct yet tactful manner.

***Presenting Opinions.*** The individuals who compose the <TEAM> Team have strong opinions but also possess characteristics that will facilitate their ability to maintain strong, collegial relationships with one another and constituents across the organization. Team members, however, also have a strong motivation to please, tend to be unnecessarily deferent to authority, and rarely take strong stands before gauging other constituencies’ viewpoints and perspectives. As a result, when their opinion is sought at key moments, they may avoid critiquing others’ ideas and plans and respond in a politically-sensitive manner that leads others to view them as overly agreeable and/or lacking a strongly-held perspective. Team members will need to make a concerted effort to maintain their strong levels of diplomacy and tact, while strategically employing a more direct and forthcoming communication style when necessary.

**HOGAN PERSONALITY INVENTORY<sup>1</sup>**  
**<TEAM> TEAM ASSESSMENT REPORT**



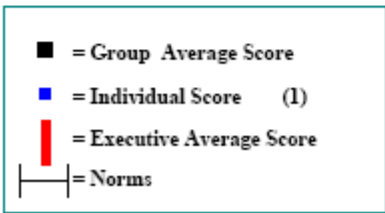
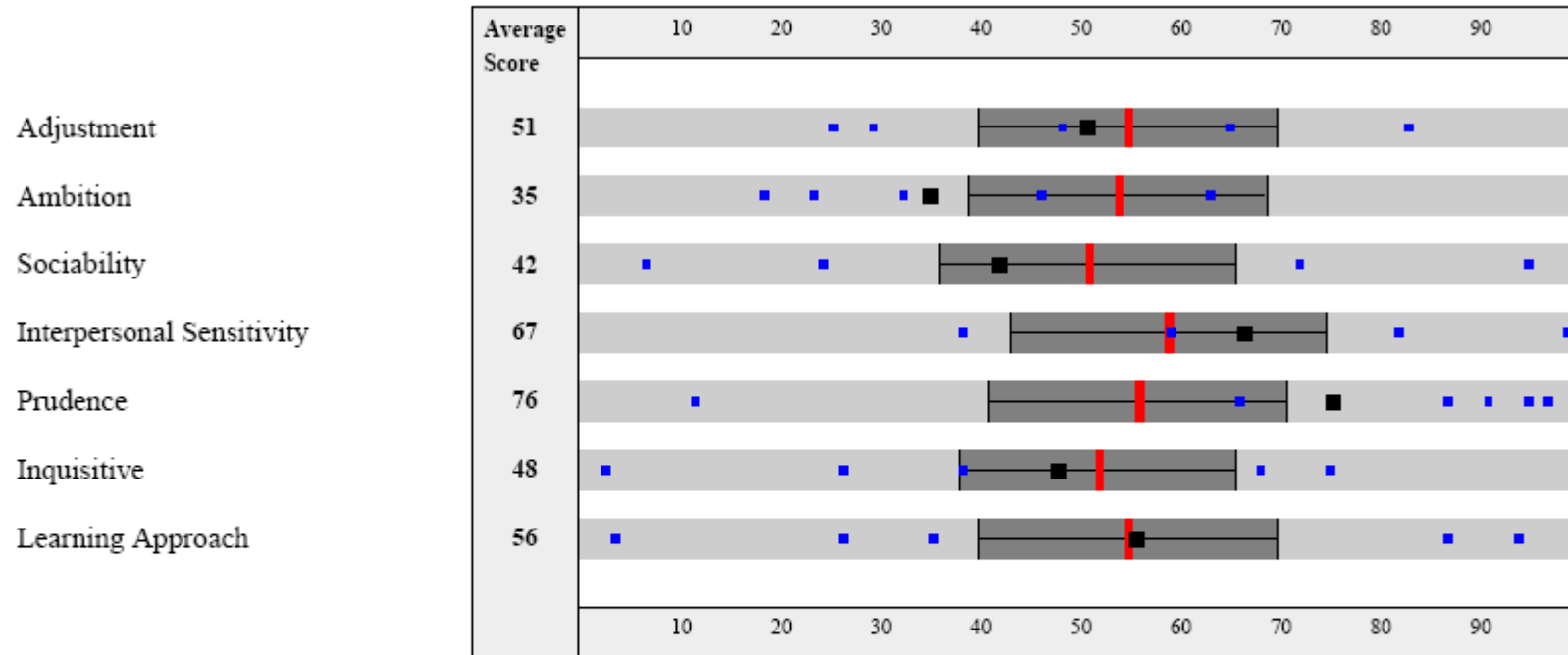
<sup>1</sup> The HPI or Hogan Personality Inventory is concerned with how a person is seen by others, with his or her distinctive interaction style or reputation. The focus of the HPI is upon characteristics that appear in social interaction and that facilitate or inhibit a person's ability to get along with others and to achieve their personal goals. HPI scores are designed to predict how others will describe a person.

# *HOGAN PERSONALITY INVENTORY<sup>2</sup>*

## *<TEAM> TEAM ASSESSMENT REPORT*

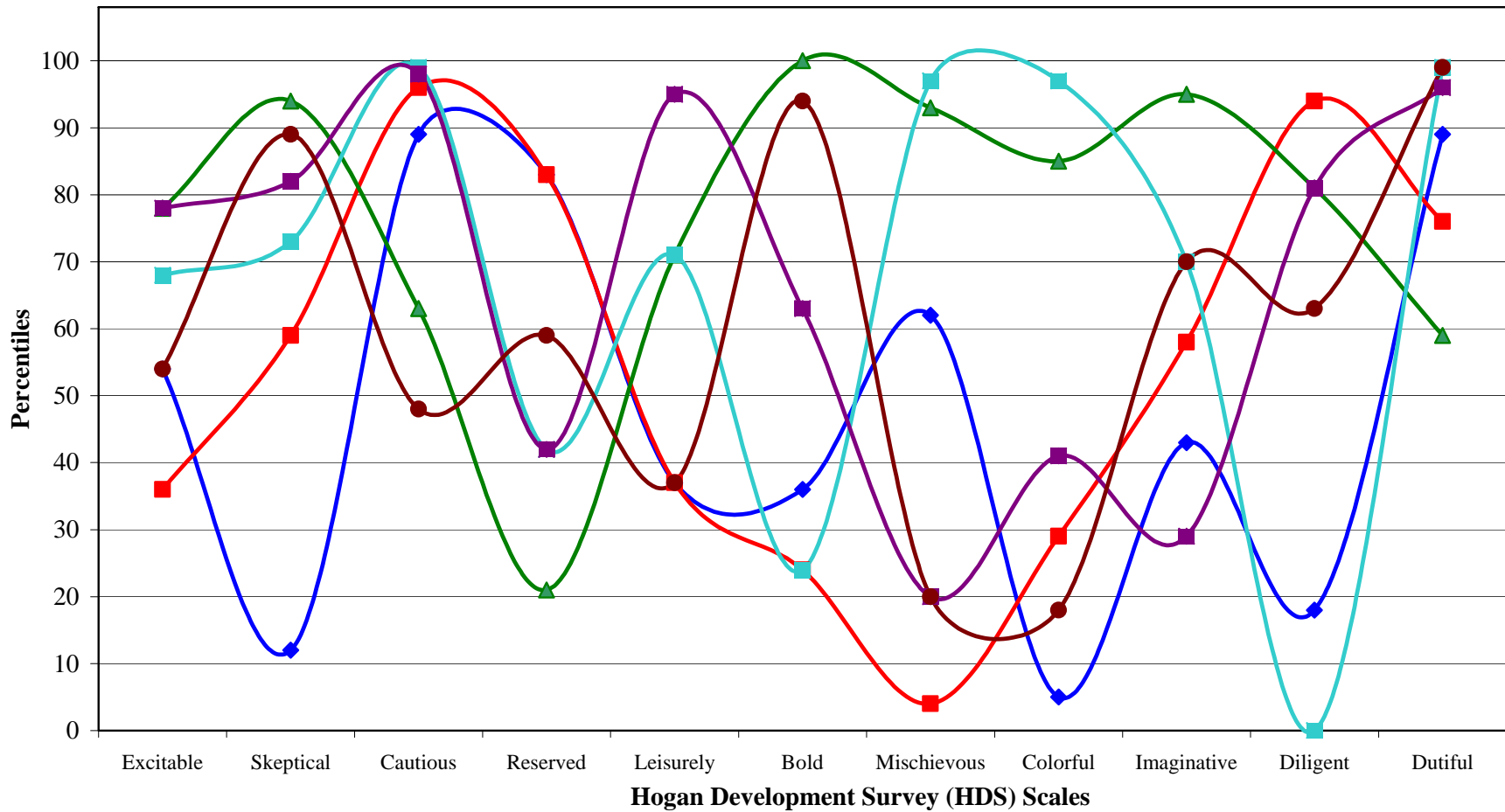
Scales

Percentiles



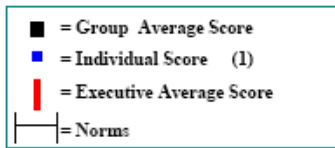
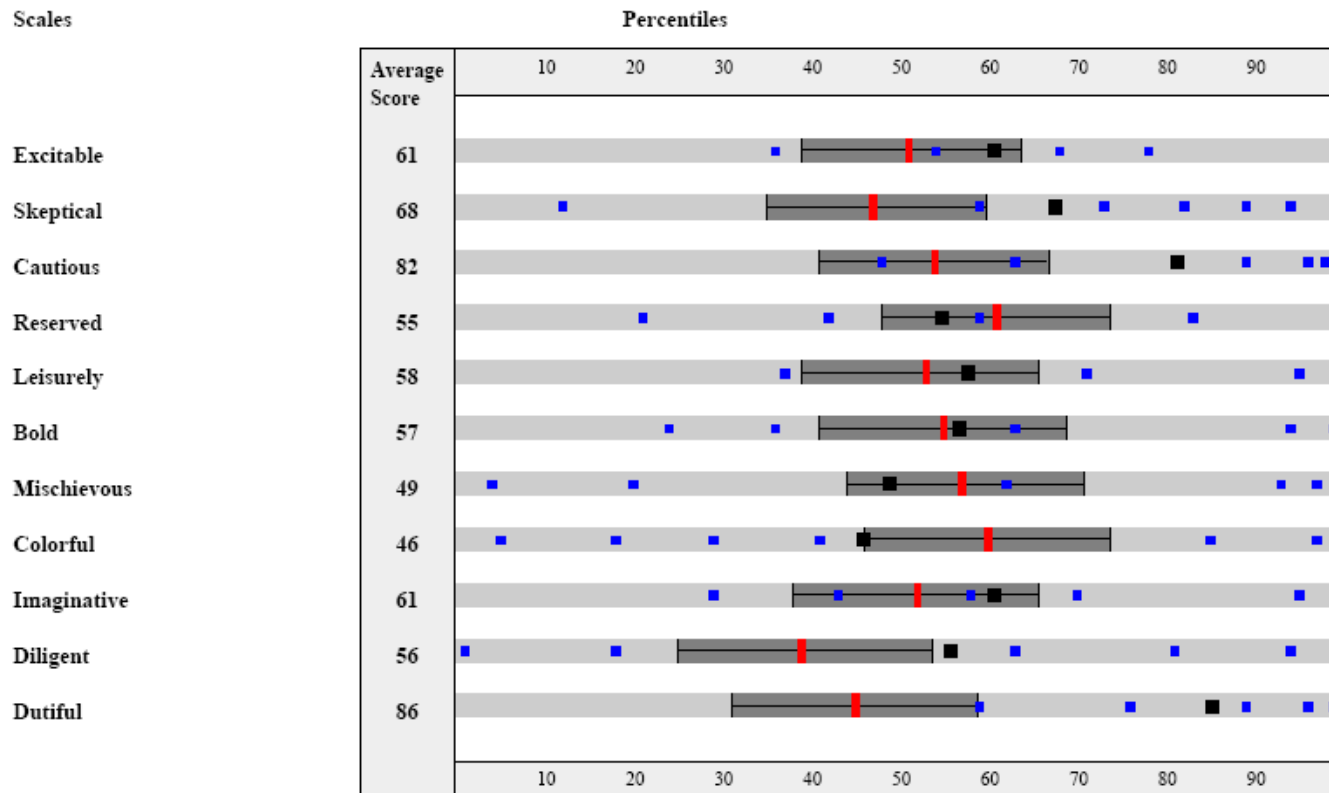
<sup>2</sup> The HPI or Hogan Personality Inventory is concerned with how a person is seen by others, with his or her distinctive interaction style or reputation. The focus of the HPI is upon characteristics that appear in social interaction and that facilitate or inhibit a person's ability to get along with others and to achieve their personal goals. HPI scores are designed to predict how others will describe a person.

***HOGAN DEVELOPMENT SURVEY<sup>3</sup>***  
***<TEAM> TEAM ASSESSMENT REPORT***



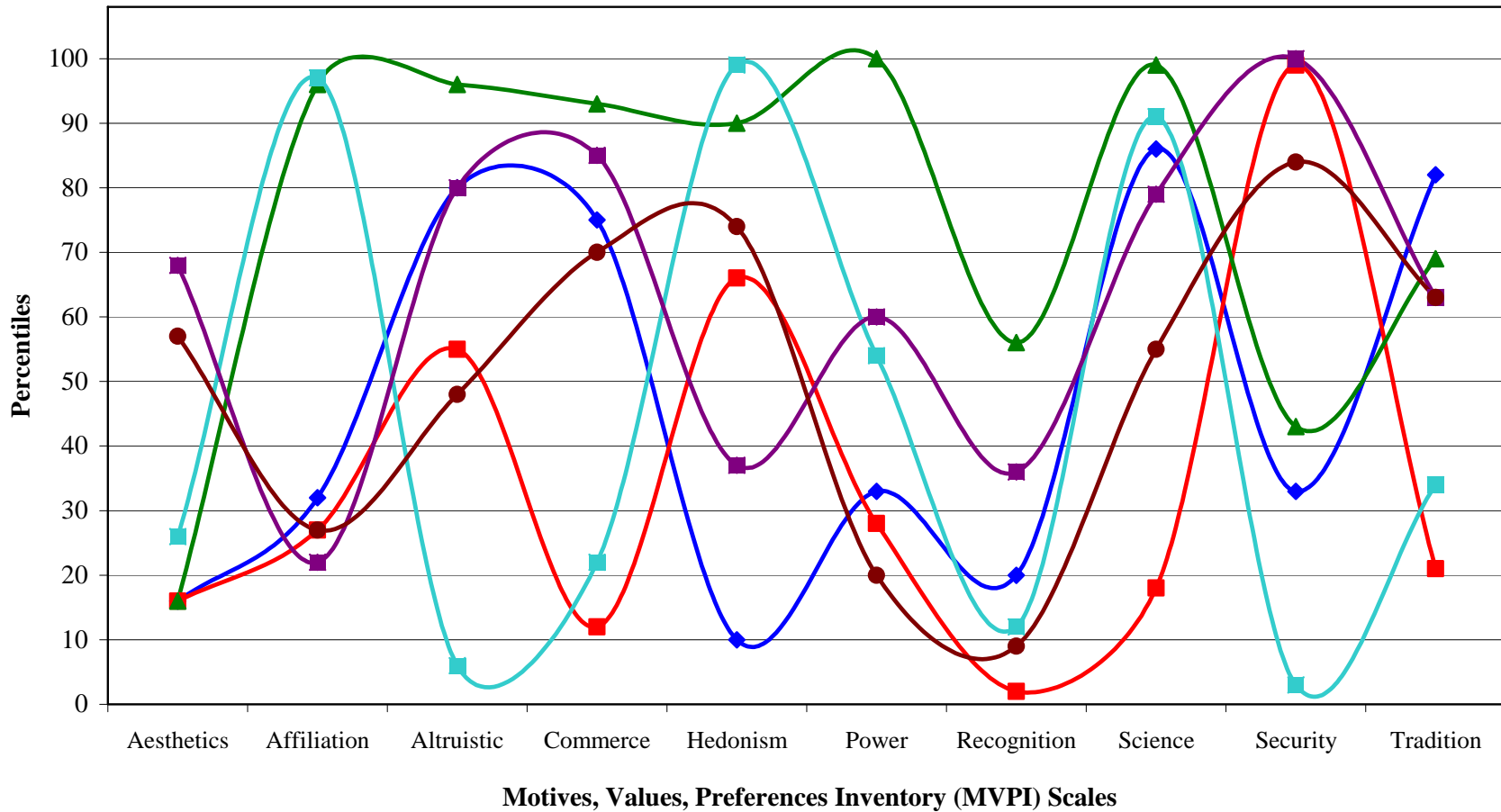
<sup>3</sup> The HDS or Hogan Development Survey is designed to measure interpersonal behavior that may appear during times of stress or heavy workloads. These tendencies can disrupt relations with others and/or interfere with a person's career goals. When considering HDS data, there are a couple of things to keep in mind. First, virtually everyone needs to improve some aspect of their social performance and the HDS indicates areas where improvement may be needed. Second, research shows that persons with lower scores on the HDS tend to have fewer problems at work. Lastly, because people are often unaware of the aspects of their interpersonal behavior that need improvement, the HDS provides an efficient and reliable way to highlight these issues so that one can learn to manage them.

## ***HOGAN DEVELOPMENT SURVEY<sup>4</sup>*** ***<TEAM> TEAM ASSESSMENT REPORT***



<sup>4</sup> The HDS or Hogan Development Survey is designed to measure interpersonal behavior that may appear during times of stress or heavy workloads. These tendencies can disrupt relations with others and/or interfere with a person's career goals. When considering HDS data, there are a couple of things to keep in mind. First, virtually everyone needs to improve some aspect of their social performance and the HDS indicates areas where improvement may be needed. Second, research shows that persons with lower scores on the HDS tend to have fewer problems at work. Lastly, because people are often unaware of the aspects of their interpersonal behavior that need improvement, the HDS provides an efficient and reliable way to highlight these issues so that one can learn to manage them.

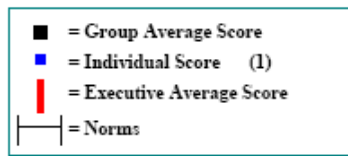
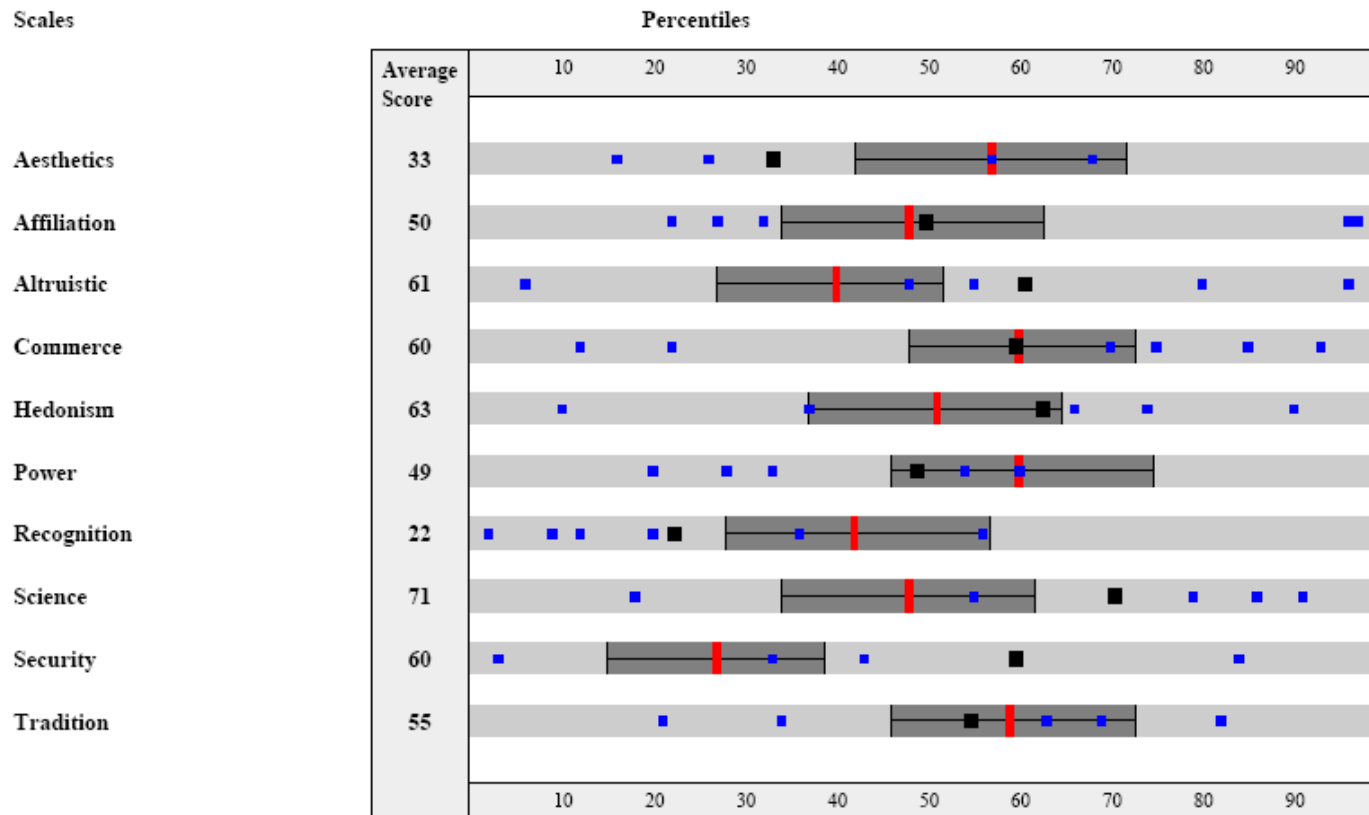
***MOTIVES, VALUES, PREFERENCES INVENTORY<sup>5</sup>***  
***<TEAM> TEAM ASSESSMENT REPORT***



<sup>5</sup> Motives, values and preferences are all motivational concepts differing primarily in terms of their generality – values are the most broad and abstract kind of motive and interests are the most narrow and specific kind of motive. These motivational concepts tell about a person’s desires and plans and they explain the long-term themes and tendencies in a person’s life. Finally, motives, values and preferences are remarkably stable; they tend to change very little as a person grows older. In short, the MVPI or Motives, Values, Preferences Inventory is designed to directly assess a person’s motives.

## *MOTIVES, VALUES, PREFERENCES INVENTORY<sup>6</sup>*

### *<TEAM> TEAM ASSESSMENT REPORT*



<sup>6</sup> Motives, values and preferences are all motivational concepts differing primarily in terms of their generality – values are the most broad and abstract kind of motive and interests are the most narrow and specific kind of motive. These motivational concepts tell about a person’s desires and plans and they explain the long-term themes and tendencies in a person’s life. Finally, motives, values and preferences are remarkably stable; they tend to change very little as a person grows older. In short, the MVPI or Motives, Values, Preferences Inventory is designed to directly assess a person’s motives.