

# SAMPLE



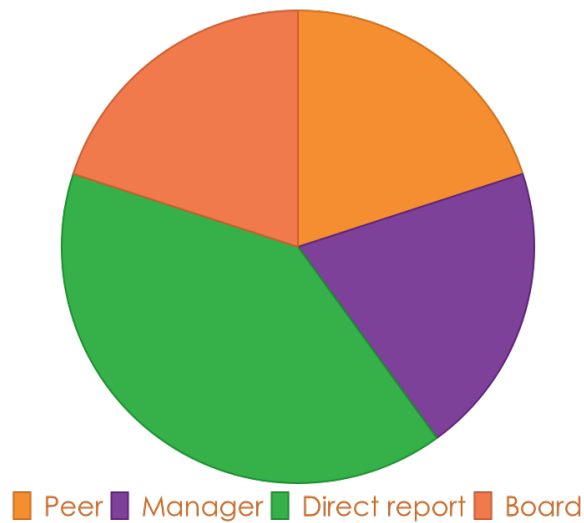
## Progress Survey Report

Deb Jones

1/25/2021

## Who provided feedback

As a follow up to your Shift Positive 360, we asked you and your colleagues to provide feedback on your performance in your development goals. We also asked your colleagues to what extent they have been involved in your efforts to improve in these areas. This report is a summary of the results from the surveys that were submitted.

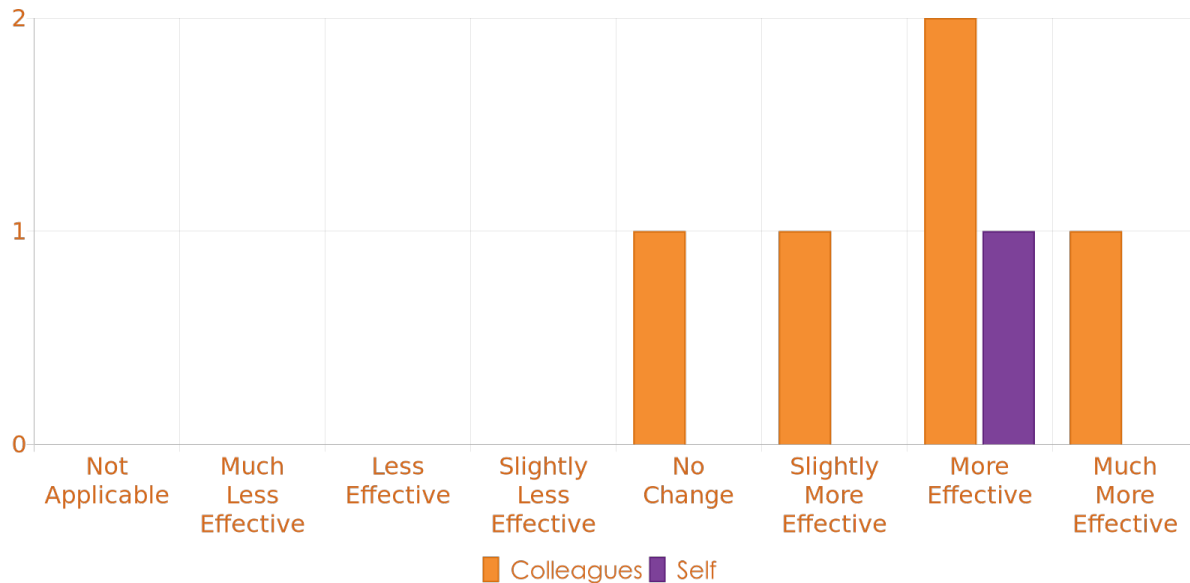


| Response      | Count    | Percent %     |
|---------------|----------|---------------|
| Peer          | 1        | 20.00         |
| Manager       | 1        | 20.00         |
| Direct report | 2        | 40.00         |
| Board         | 1        | 20.00         |
| <b>Total</b>  | <b>5</b> | <b>100.00</b> |

## Performance in Your Development Goals

The extent to which Deb showed improvement:

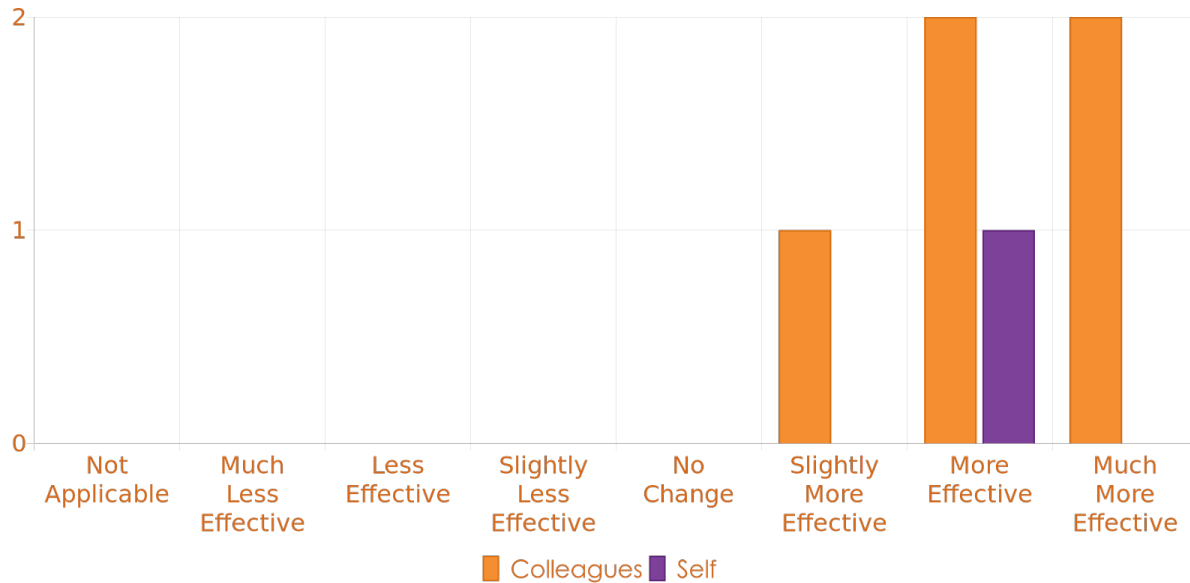
Development goal #1 Creatively engage team members to take on new challenges



| Response                | Colleagues | Percent %     | Self |
|-------------------------|------------|---------------|------|
| Not Applicable          |            | 0.00          |      |
| Much Less Effective     |            | 0.00          |      |
| Less Effective          |            | 0.00          |      |
| Slightly Less Effective |            | 0.00          |      |
| No Change               | 1          | 20.00         |      |
| Slightly More Effective | 1          | 20.00         |      |
| More Effective          | 2          | 40.00         | 1    |
| Much More Effective     | 1          | 20.00         |      |
| <b>Total</b>            | <b>5</b>   | <b>100.00</b> |      |

## Performance in Your Development Goals

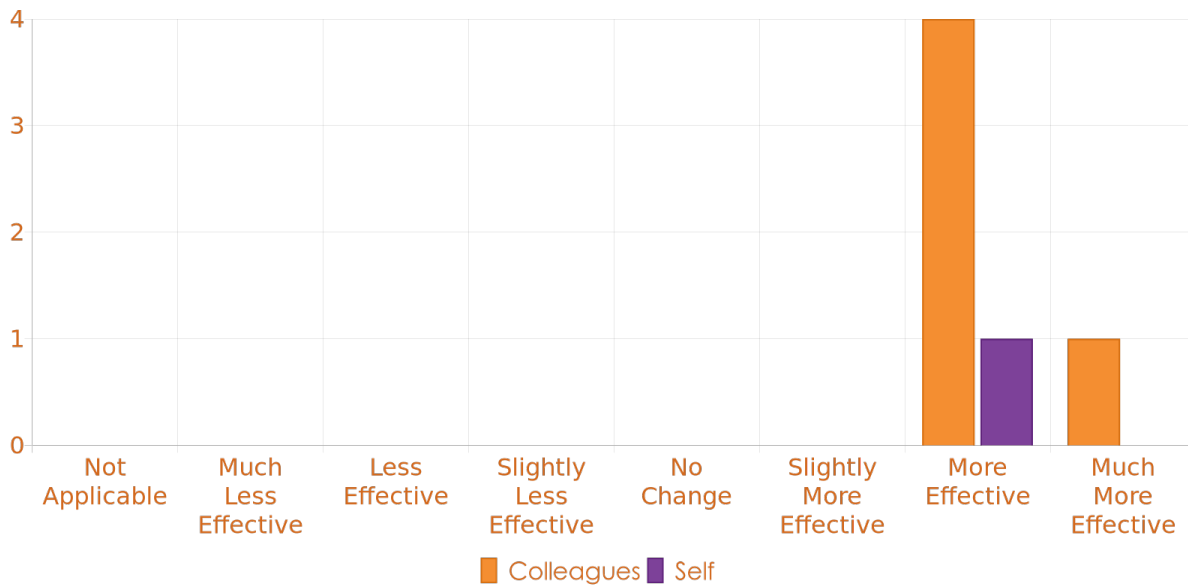
Development goal #2 Be clear with expectations of self and staff



| Response                | Colleagues | Percent %     | Self |
|-------------------------|------------|---------------|------|
| Not Applicable          |            | 0.00          |      |
| Much Less Effective     |            | 0.00          |      |
| Less Effective          |            | 0.00          |      |
| Slightly Less Effective |            | 0.00          |      |
| No Change               |            | 0.00          |      |
| Slightly More Effective | 1          | 20.00         |      |
| More Effective          | 2          | 40.00         | 1    |
| Much More Effective     | 2          | 40.00         |      |
| <b>Total</b>            | <b>5</b>   | <b>100.00</b> |      |

## Performance in Your Development Goals

Development goal #3 Get out and connect with potential clients to increase business



| Response                | Colleagues | Percent %     | Self |
|-------------------------|------------|---------------|------|
| Not Applicable          |            | 0.00          |      |
| Much Less Effective     |            | 0.00          |      |
| Less Effective          |            | 0.00          |      |
| Slightly Less Effective |            | 0.00          |      |
| No Change               |            | 0.00          |      |
| Slightly More Effective |            | 0.00          |      |
| More Effective          | 4          | 80.00         | 1    |
| Much More Effective     | 1          | 20.00         |      |
| <b>Total</b>            | <b>5</b>   | <b>100.00</b> |      |

## What have you noticed that is working well?

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**Self** Our meetings are much better. I'm showing up more calm yet energized. I'm intentionally showing that I believe in the team and that they are future leaders. I take time to think about how audience is, what they need to know and who is best on the team to deliver the messages.

**Lauren Lawson** I think her team is being much more responsive to our needs. Deb is really paying attention to us as well. She lit a fire.

**Deb Dodger** She is allowing others to run team meetings so she can listen more and bring her creativity to the group. She is also naming specific clients/potential customers on the board that she is expecting to visit or have us visit that week.

**Liam Liamson** She's definitely clearer about what she and her team are doing on a monthly basis - what clients they're targeting and what that means to the company. She's talking more about her team and who is stepping up as well so I think she is managing them better.

**Joe Joeson** She is more direct with her ask of others and clear about why it is important. She recaps meetings by stating what decisions were made and who is to do what by when. Now, she is out connecting with client/potential clients almost every day.

**Jim Jimson** She's listening better to others and seems more relaxed at meetings. I think it takes a lot for her to sit back and take it in. Well done.

## What would you recommend to become even more effective?

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**Self** Keep raising the bar on the team. Get out even more frequently. Identify who on the team is ready to take on more of the internatl business. Be actively engaged at the LT meetings whether it has a direct affect on our area or not.

**Lauren Lawson** Follow up our account calls with a succinct list of who is doing what by when.

**Deb Dodger** Put people's names next to specific clients. Get even faster at the assignments - we can get quicker at this. Talk about the clients we have landed and what lead to that success.

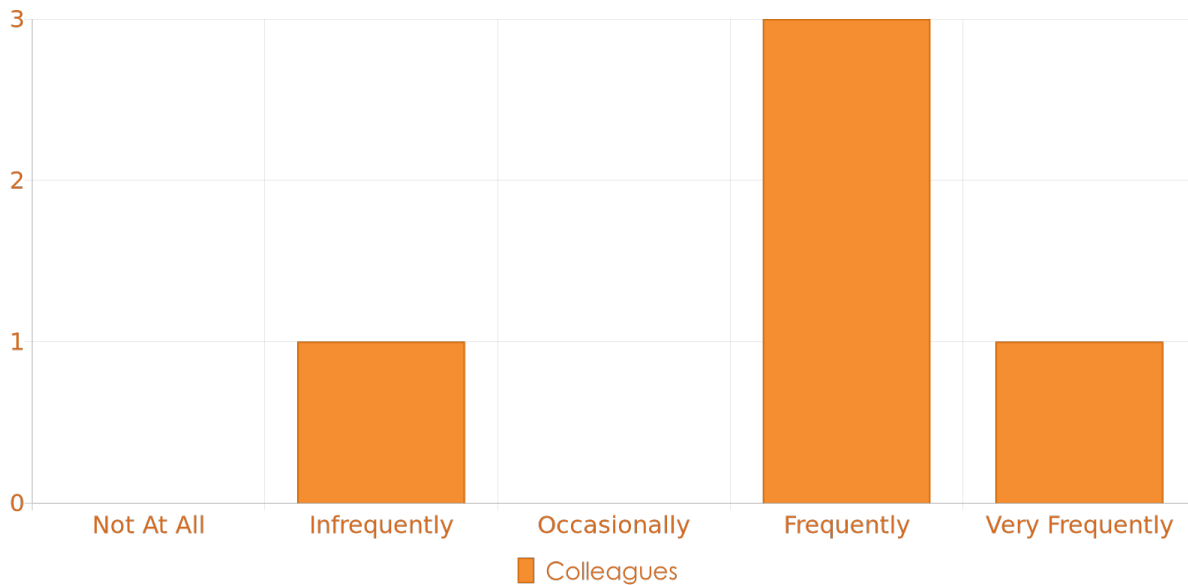
**Liam Liamson** Develop a report that shows her and her team's impact more succinctly. Also, show more interest in other members of the leadership team and what they are focused on. Share what approaches are working well for her.

**Joe Joeson** Ask people if there is anything getting in the way of them being able to deliver. Also, get out of the office every day to see clients eventually.

**Jim Jimson** Show curiosity about others on the LT. See how her group can connect more with Marketing to coordinate efforts. Ask more open-ended questions.

## Colleague Involvement

How frequently did you speak with Deb about her development goals (listed above)?



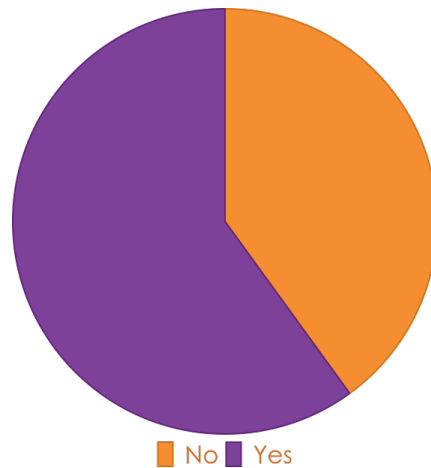
| Response        | Colleagues | Percent %     |
|-----------------|------------|---------------|
| Not At All      | 0          | 0.00          |
| Infrequently    | 1          | 20.00         |
| Occasionally    | 0          | 0.00          |
| Frequently      | 3          | 60.00         |
| Very Frequently | 1          | 20.00         |
| <b>Total</b>    | <b>5</b>   | <b>100.00</b> |



## Colleague Involvement

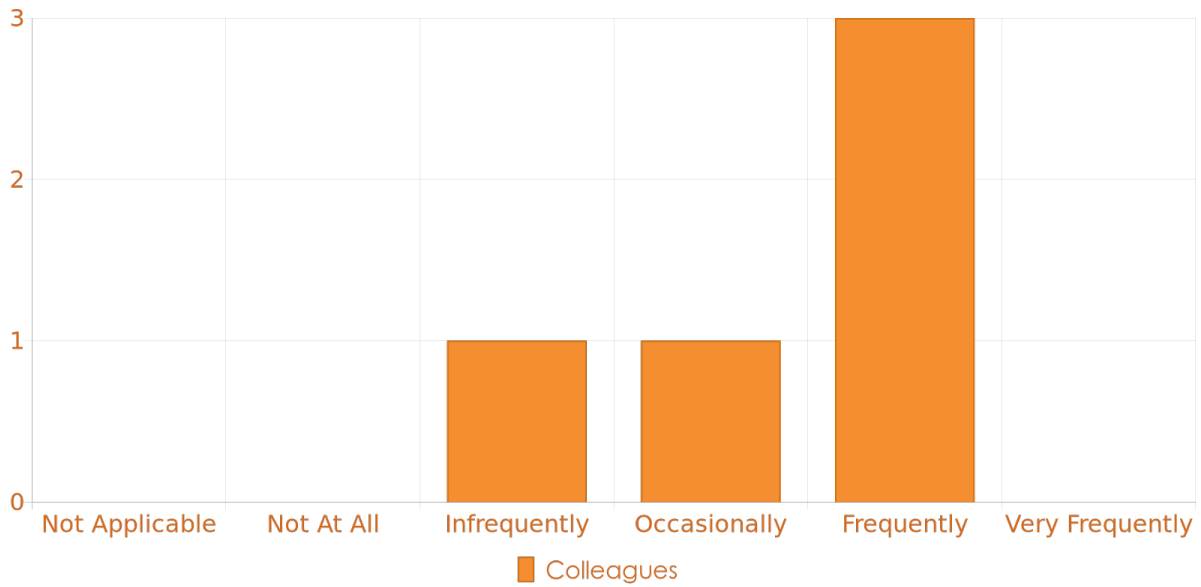
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Did Deb talk with you about specific actions you could take or the "one thing" you offered in support of her development?



| Response | Colleagues | Percent % |
|----------|------------|-----------|
| No       | 2          | 40.00     |
| Yes      | 3          | 60.00     |
| Total    | 5          | 100.00    |

## To what extent did you help?



| Response        | Colleagues | Percent %     |
|-----------------|------------|---------------|
| Not Applicable  |            | 0.00          |
| Not At All      |            | 0.00          |
| Infrequently    | 1          | 20.00         |
| Occasionally    | 1          | 20.00         |
| Frequently      | 3          | 60.00         |
| Very Frequently |            | 0.00          |
| <b>Total</b>    | <b>5</b>   | <b>100.00</b> |

## Specifically, how did you help?

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**Lauren Lawson** I did ask her what was happening that kept her from getting to our company more.

**Deb Dodger** We're talking daily about key clients and I'm telling her what I can take off of her plate.

**Liam Liamson** I asked who she and her team were targeting as new clients.

**Joe Joeson** I took leadership of our weekly team meeting agenda and asking at the close of the meeting if people were clear on decisions.

**Jim Jimson** I asked her every week about potential clients, the pipeline, what barriers she was hitting and what she needed from me.

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## What are you willing to do to help Deb make even more progress?

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**Lauren Lawson** Ask her about who on her team is going to manage the day to day with our account and be clear with her about what our needs are from the Leadership Institute.

**Deb Dodger** I can handle more of a client caseload. I can also go to some key clients without Deb so she can bring in new business. I can also remind her that she doesn't have to lead the team meetings.

**Liam Liamson** I can help her develop a report showing her client pipeline. I can ask her about her team and how they are growing.

**Joe Joeson** Nudge her to see specific clients/potential clients.

**Jim Jimson** I'll do more of the same (ask her about potential clients in our weekly meeting) and I'll start asking her about her key staff and how she is developing them.

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## What specific impact (business, retention, team, customer, etc.) did you see as a result Deb's growth?

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Please quantify (to the best of your ability) the impact of that success (in terms of savings, revenue, engagement score, etc.)

| Who           | Specific Impact                                                                   | Impact Quantified                                                                                                                                                                                              |
|---------------|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Self          | Clients are happier. Also, we've had no turnover in the department.               | Our client engagement scores were over 4.75 last quarter. Every reduction in turnover is at least \$80K in savings/revenue gain.                                                                               |
| Lauren Lawson | She kept us as a client                                                           | We're a \$300K client to the Leadership Institute                                                                                                                                                              |
| Deb Dodger    | The team is more cohesive and productive.                                         | We've gone over our expected monthly client revenue as a team by \$120,000/month. I know at least one person stayed on the team (and they're good) - probably saved us \$50K in recruitment/replacement costs. |
| Liam Liamson  | The department is definitely hitting their numbers.                               | They're over budget on revenue y-t-d by about \$300K.                                                                                                                                                          |
| Joe Joeson    | Our team productivity is up and we've landed more clients in the last month.      | I know we landed a \$150,000 client that we wouldn't have gotten if she hadn't made this change.                                                                                                               |
| Jim Jimson    | Expense savings through better resource decisions and we're getting more clients. | Savings of at least \$50K revenue is up by \$100K+                                                                                                                                                             |