

# ***VALUES-BASED LEADERSHIP SELF-ASSESSMENT***

**A Baseline Measurement of A Leader with The Values which are:**

**Value  
Quality  
Access  
Efficiency  
Teamwork  
Innovation  
Timeliness  
Commitment  
Environment  
Self Management**

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SAMPLE

## About the Assessment

Values-Based Leadership is defined as taking the steps and actions that produce a Values-Based culture. The Values-Based Leadership Self Assessment measures the predictors of creating a customer focused organization, where customer preference, loyalty and return and recommend rate reach distinctly higher levels. Organizations which are lead to these high levels of performance in the eyes of the customer are 'known as the best'.

This valuable self assessment and personal improvement process will measure to what extent you are effectively leading the people and circumstances in your situation to produce Values-Based results.

## Facilitator Guidelines

Administering the Values Based Self-Assessment doesn't require special experience, but facilitators who deliver this instrument are applying a tool with potentially important. Everyone can benefit from improving awareness about leadership skills and developing ways to improve them.

This instrument is a potentially valuable tool with a variety of targeted populations. Each administrator should evaluate the instrument responsibly before applying it and consider carefully the unique conditions and circumstances of the individuals and populations to whom it will be administered. It is important that you read through the instrument in advance to assess how long you will be committing to this exercise.

When using with a group, it might be helpful to project a copy of the Values-Based Leadership Impact Chart with an example on an overhead transparency to demonstrate. When a facilitator presents this material and proceeds through an interpretation of the Values-Based Leadership Impact Chart, it becomes very important to gauge the climate of the group. Each facilitator must exercise responsible discretion and check in often with participants to be sure they are comfortable in any group discussion.

**Talk about why values based leadership is important.** Having leadership characteristics based on Values, creates a basis for a customer focused organization. This will lead the organization with high level of customer preference, loyalty and return and recommend rate.

**Encourage subjects to be honest.** This assessment works only if participants are completely honest. As a result, a foundational measurement is established from which real improvements can be made.

**Create a safe atmosphere.** Emphasize the ground rules of quiet, privacy, and not bothering others or discussing results if participants finish early. Give

individuals as much space and individual privacy as the room allows, changing seating and orientation if necessary to create the maximum feeling of individual security and privacy.

**Allow sufficient time.** This self-assessment should not be rushed. Although answering the questions does not take long, emphasize that participants should think about each question before answering. Allow yourself enough time to explain how the results are plotted on the Values-Based Leadership Impact Chart and to lead the improvement planning section.

**Explain the scale.** Each of the questions on the assessments uses a 1–5 scale with one being lowest and five highest. Be sure your group understands the scale, and encourage participants to give the number that most exactly reflects their feelings. Be sure they understand that writing a five is okay and that simply means they can't think of a way things could be better than they already are in a particular area. Also remind them that they might use a five today and a lower number tomorrow.

**Give examples.** Choose one or two questions from the assessment and try to draw the group out and use their own examples to further personalize the process. This is a good time to gauge understanding of the questions and clarify any misconceptions about how the instrument is used.

**Check for participation.** Check that participants fill out the survey correctly, marking each question individually rather than marking all fives etc and that they are engaged in the process. Reinforce participation when necessary without forcing or coercing anyone to participate.

**Plot the results.** Participants use math to calculate mean scores and plot the survey results on the Values-Based Leadership Impact Chart . Demonstrate and guide your audience through these steps slowly and clearly so participants all get accurate and clear results. Move around the room and help people as necessary.

**Discuss the findings.** The facilitator can aid the interpretation of results. Follow the algorithms provided over all, but feel free to use your own approach for discussing findings and sharing individual perspectives. Once again, maximize group participation.

**Improvement planning.** Have participants develop their own personal improvement plan. When delivering this assessment to a group, use large or small group brainstorming to generate improvement ideas.

## Values-Based Leadership Self-Assessment

This self-assessment is a measurement of how you believe you lead others, and what you see your own leadership strengths and opportunities for improvement. This self-assessment is confidential so please be as honest as possible. Rate yourself from 1 (the lowest) to 5 (the highest) on the extent to which you believe is true for each question. Please answer all 50 questions so an overall score may be calculated.

### QUALITY

1. Insures that all subordinates are fully trained to demonstrate product/service line expertise.

1    2    3    4    5

2. Identifies and implements best business practices.

1    2    3    4    5

3. Maintains the positive reputation of the company.

1    2    3    4    5

4. Develops and implements error free processes.

1    2    3    4    5

5. Produces the highest standard of products/services to meet customer needs.

1    2    3    4    5

### VALUE

6. Ensures that the product/service line provides an excellent value to the customer.

1    2    3    4    5

7. Produces a product/service line that is a better value compared with competitors.

1    2    3    4    5

8. Ensures that product/service line remains a good value to customers long after delivery.

1    2    3    4    5

9. Keeps product and service line cost and price increases proportional over time.

1    2    3    4    5

10. Provides products/service at an excellent price compared to their actual worth.

1    2    3    4    5

## **EFFICIENCY**

11. Develops smooth and efficient processes resulting in rapid and accurate fulfillment of customer needs.

1      2      3      4      5

12. Constantly works to eliminate waste, rework, redundancy or unnecessary decision points.

1      2      3      4      5

13. Works with process owners to continuously improve systems and processes.

1      2      3      4      5

14. Ties pay advancement and rewards to subordinate performance.

1      2      3      4      5

15. Regularly maps, measures and monitors processes.

1      2      3      4      5

## **TIMELINESS**

16. Responds to customer needs in minimum time possible.

1      2      3      4      5

17. Delivers on time and often ahead of schedule.

1      2      3      4      5

18. Takes all the time the customer requires to fulfill their needs.

1      2      3      4      5

19. Ensures the customer doesn't have to spend any more time then required.

1      2      3      4      5

20. Measures timeliness based upon the nature of the process, not arbitrary goals.

1      2      3      4      5

## **ACCESS**

21. Creates an environment of openness and accessibility.

1      2      3      4      5

22. Facilitates and encourages subordinates to maximize channels of communication with their customers.

1      2      3      4      5

23. Ensures access to management and service personnel for all customers/stakeholders.

1      2      3      4      5

24. Insures customer/stakeholder access to all product and service line information and support.

1      2      3      4      5

25. Crates single point of access for customers/stakeholders to get their needs met.

1      2      3      4      5

## SELF MANAGEMENT

26. Maintains a professional image and appearance.  
1 2 3 4 5
27. Has a consistently positive and enthusiastic attitude.  
1 2 3 4 5
28. Makes subordinates feel welcome and appreciated.  
1 2 3 4 5
29. Is attentive and courteous.  
1 2 3 4 5
30. Optimizes talents, abilities and personal conduct for the benefit of all relationships.  
1 2 3 4 5

## ENVIRONMENT

31. Constantly applies current technology to improve product and service delivery.  
1 2 3 4 5
32. Provides resources that support the delivery of quality in all transactions.  
1 2 3 4 5
33. Provides all subordinates with a clean, safe, well organized and pleasant work environment.  
1 2 3 4 5
34. Creates a warm and welcome atmosphere.  
1 2 3 4 5
35. Constantly applies best management practices to get the best from subordinates.  
1 2 3 4 5

## TEAMWORK

36. Facilitates open communication and a friendly attitude among subordinates.  
1 2 3 4 5
37. Collaborates well with others/departments in the organization to meet customer needs.  
1 2 3 4 5
38. Has skill in planning, facilitating and leading team meetings.  
1 2 3 4 5
39. Can rally the subordinates to work cooperatively toward common goals.  
1 2 3 4 5
40. Can facilitate high quality decision making, being sure all points of view are heard.  
1 2 3 4 5

## COMMITMENT

41. Can be trusted and relied upon by subordinates and customers.

1      2      3      4      5

42. Honestly provides customer and subordinates all information that affects them, up front and on time.

1      2      3      4      5

43. Closely monitors and rapidly provides for customer and/or subordinate needs.

1      2      3      4      5

44. Immediately takes responsibility and corrects whatever outcomes are not achieved.

1      2      3      4      5

45. Demonstrates dedication to a long term relationship with customers/subordinates.

1      2      3      4      5

## INNOVATION

46. Constantly solicits and implements subordinate's ideas for new changes and improvements to the product/service line.

1      2      3      4      5

47. Identifies and develops the natural talents of each subordinate.

1      2      3      4      5

48. Encourages and rewards workers for their ideas and creativity.

1      2      3      4      5

49. Involves customers and stakeholders in generating improvement ideas.

1      2      3      4      5

50. Performs benchmarking of industry best practices.

1      2      3      4      5

## Plotting Results on the Impact Chart

1. Transfer the scores from your Assessment to the Impact Chart. Make a mark that corresponds to your score for each question on the lines provided. Low scores are closer to the center and higher scores are towards the outside of the impact chart.
2. To calculate the mean score for each category, add the numbers for each of the five questions in each category and divide by five. Write the mean score for each category in the spaces provided on the impact chart. Put a star next to the highest scoring category and an *X* next to the lowest scoring category.
3. Add the ten category scores together and divide by ten to get an Overall Mean Score. Write that result in the space provided.
4. On the impact chart, draw a circle indicating the overall mean score.
5. Put a star over each mark for questions 1 through 50 that is greater than the overall mean score and put an *X* over each mark that is lower than the overall mean score.
6. Calculate the difference between the highest individual question score and the lowest individual question score. This is your balance range. Write this number in the space provided.

SAMPLE

# VALUES-BASED LEADERSHIP IMPACT CHART

Name: .....  
Date: .....

**QUALITY**  
Category  
Mean Score: .....

**INNOVATION**  
Category  
Mean Score: .....

**COMMITMENT**  
Category  
Mean Score: .....

**VALUE**  
Category  
Mean Score: .....

**TEAMWORK**  
Category  
Mean Score: .....

**EFFICIENCY**  
Category  
Mean Score: .....

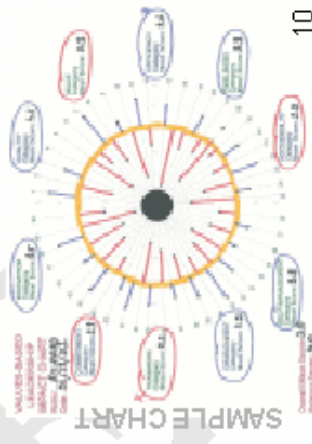
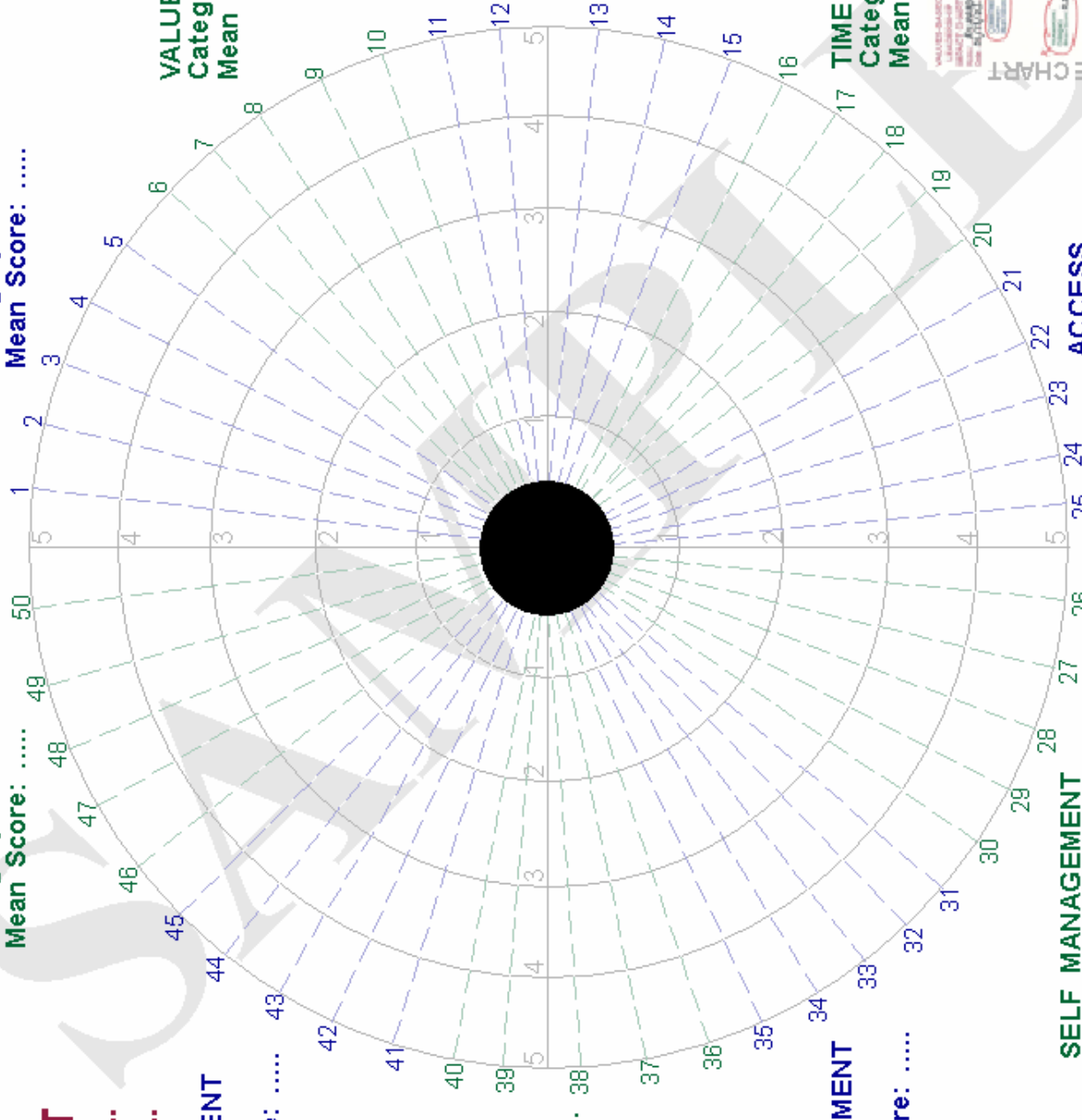
**ENVIRONMENT**  
Category  
Mean Score: .....

**TIMELINESS**  
Category  
Mean Score: .....

**SELF MANAGEMENT**  
Category  
Mean Score: .....

**ACCESS**  
Category  
Mean Score: .....

**Overall Mean Score: .....**  
**Balance Range: .....**



## Interpreting the Impact Chart

The Impact Chart contains all 50 questions and is broken down into the ten categories: Quality, Value, Efficiency, Timeliness, Access, Self Management, Environment, Teamwork, Commitment and Innovation. An overall category mean score for each category is provided. The combination of overall mean scores is used to develop an overall mean score for the entire instrument. A name and date field is included to indicate who completed the assessment and when they scored it.

### 1<sup>st</sup> level of analysis

**Overall mean score.** The overall mean score represents the degree to which individuals are up to their values-based leadership potential and the degree to which it is demonstrating excellence. Low or high numbers for each question combine for an overall score or *effect* for values-based leader.

**Scores above the mean.** These high scoring questions, marked with a star, are the strongest characteristics and tendencies individuals are experiencing presently.

### 2<sup>nd</sup> level of analysis

**Category strengths and weaknesses.** Naturally, some categories are higher or lower than others. Participants can self-evaluate to see what types of patterns emerge. Notice which categories are above the overall mean (the areas which are stronger) and which categories are lower than the overall mean (the categories that bring the overall numbers down). A difference between categories or questions of less than .50 is not considered statistically significant. Differences of .51 or greater are considered significant and can be examined as such.

### 3<sup>rd</sup> level of analysis

**Highest overall question/lowest overall question.** The participants may give consideration to the biggest strength in terms of values-based leadership and the area in which the most improvement is needed.

### 4<sup>th</sup> level of analysis

**Balance range.** The Balance range is the relative distance of the two farthest points from the overall mean score (the highest and lowest scores mentioned above). If this number is tighter or closer to zero, it indicates overall balance in values-based leadership. This suggests that the person applies equal attention to each area, which indicates more consistency. A higher balance range indicates that there is more variation less consistency in the different areas.

## Three Levels of Values-Based Leader

The overall mean score represents the degree you are living up to your potential as a Values-Based Leader. The organizations with which you are involved and have an influence on or responsibility for will be influenced according to the actions that you take, the priorities you set, and the values you embrace. Based upon the numbers generated by you on this assessment, you are capable of leading a group or organization at one of *three levels*:

### **SURVIVAL**

**Overall Mean Scores of 1.0 – 2.09.** Organizations at this level create continual customer disappointment, dissatisfaction and even customer hostility at the lowest levels. Not only is there nothing special to describe an organization at this level, it is creating actual damage and loss to its customers. Leaders with overall mean scores that fall into the 'survival zone' should consider an aggressive personal development plan or leaving the role of leader to someone more capable.

### **MAINTAINING**

**Overall Mean Scores of 2.1 – 3.99.** This area is where most leaders score since most organizations are maintenance organizations. These leaders are getting along inside of the zone of customer indifference. There may be positives happening in some areas but the overall effect is one of nothing memorable. Unfortunately for the leader with a score in this range, the negatives cancel out the positives for an overall effect of results not scoring high enough to create a net positive effect on your customers. Although not in crisis, this type of leader can be described as 'getting along'. Look at your category results in depth to determine where improvements can be made which will produce the best results and get you into positive territory. The self-assessment will show which values need greater emphasis. By increasing the emphasis on these values, the culture will transform and become more values based.

### **EVOLVING**

**Overall Mean Scores of 4.0 – 5.0.** A leader that is evolving clearly demonstrates the Quality Values and is capable of values based cultural transformation. The customers of this leader are satisfied. This leader produces a positive effect, preference and loyalty at some level. The higher the score, the more positive effects this leader creates. Customers of this leader are sharing their positive experiences with others and recommending this leader as capable and effective.

## The Values-Based Leadership Categories and Their Effects

The same numbers above for Surviving/Maintaining/Evolving apply to each of the categories listed below. High would be in the range of Evolving, low would be in the range of Surviving, and scores in the middle put one into the Maintenance range.

### Quality Category Score: \_\_\_\_

**High in Quality:** Recognized as an expert, known for delivering high quality and error free work, known for being the best at what you do, recognized as knowing what's going on, known for applying best practices.

**Low in Quality:** Known as not totally informed/up to date, known for making mistakes, known for not being the best.

### Value Category Score: \_\_\_\_

**High in Value:** Known for providing more than is expected, known for keeping costs/prices reasonable, known as cost effective compared with others, known for delivering real long term value.

**Low in Value:** Known for being not worth the time/money/energy invested, known for overcharging, known for increasing prices unreasonably, more expensive than competitors.

### Efficiency Category Score: \_\_\_\_

**High in Efficiency:** Known for using most efficient methodology/process, known for being easy to deal with, and known for finding better ways of doing things.

**Low in Efficiency:** Known as hard to deal with, known for wasting time/energy/resources, known for not changing or improving.

### Timeliness Category Score: \_\_\_\_

**High in Timeliness:** Known for being on time, taking the minimum time required for desired outcomes, taking all the time required when necessary, and known for making timeliness a priority.

**Low in Timeliness:** Known as one who wastes time, isn't on time, doesn't take all the time required for successful event fulfillment, doesn't make timeliness a priority.

### Access Category Score: \_\_\_\_

**High in Accessibility:** Is easy to get a hold of, is approachable, provides all information requested, makes themselves available as a priority.

**Low in Accessibility:** Known for being hard to get a hold of, hard to approach, known for putting barriers up to dealing with customers directly, isn't available enough to fulfill customer needs.

**Self Management Category Score: \_\_\_\_**

**High in Self Management:** Is courteous, attentive, creates a great first impression, brings positive energy and motivation to relationships, and is friendly and enthusiastic.

**Low in Self Management:** Is discourteous, makes a bad first impression, and brings personal moods and negativity into relationships.

**Environment Category Score: \_\_\_\_**

**High in Environment:** Makes safety, organization, cleanliness and comfort a priority, creates a welcoming environment for others.

**Low in Environment:** Doesn't make safety, cleanliness, organization etc. a priority. Creates and uncomfortable environment for others.

**Teamwork Category Score: \_\_\_\_**

**High in Teamwork:** Works well with others, other departments, makes collaboration a priority, works to create synergy with others.

**Low in Teamwork:** Works badly with others, is not a contributing team member, does not work to create synergy with the team.

**Commitment Category Score: \_\_\_\_**

**High in Commitment:** Can be trusted and relied upon to follow through, is honest, demonstrates a commitment to customers, constantly solicits customer needs, and provides all information up front.

**Low in Commitment:** Does not take responsibility when things go wrong, can't be trusted and relied upon, withholds information from customers, and does not have customers' long term best interests in mind.

**Innovation Category Score: \_\_\_\_**

**High in Innovation:** Constantly introduces new methods and approaches, new products and services, makes continuous improvement a priority, encourages others to come up with new ideas.

**Low in Innovation:** Uses same old approaches and methodology, not known for using current practices, doesn't solicit new ideas.

## Developing the Improvement Plan

The improvement planning process is the final step in the Values Based Leadership Self-Assessment Process and can be done in large-group or small-group discussion.

**Start with the strengths.** Increasing positives and improving negatives will make a positive impact on the organization. Managers/employees appreciate being acknowledged for their strengths first, before addressing the more problematic areas. This approach builds participation and gets everyone involved in the process. As an exercise, you can have participants give an example of how their leadership strengths are put into action during their day-to-day routine and why they are important.

**Opportunities for improvement.** When moving into the lower scoring areas, keep the discussion non-judgmental and objective. Reinforce the idea that all organizations are working on something and excellence represents a continual opportunity to improve. Emphasize that examining the ways in which the organization can improve is a very proactive step. Conduct brainstorming sessions on each category and then allow the group to select from these ideas for developing the improvement plan. A prioritization exercise could also be valuable.

**Use small groups.** Another way to stimulate ideas is to break into discussion groups. Choose a category for each small group and have participants generate ideas for what the organization could do to improve. Have the groups report back to the large group and allow participants to add additional ideas. This is a powerful group process for developing improvement ideas.

**Use assignments.** Have each person target one or two areas that they want to work to improve. Have them report back the next session on what happened.

**Re-measure after improvements.** Remember that you will have numeric, statistical data as a baseline and can re-measure progress over time. This is a great instrument for reaffirming efficacy of targeted improvements and measuring change over time.

## The Improvement Plan

Each area should serve as a personal opportunity for improvement. Commit yourself today to making the improvements to reach your potential as a Values-Based Leader.

What were your five highest scoring areas? (The five highest scoring questions on the assessment).

- 1.
- 2.
- 3.
- 4.
- 5.

What are some strategies that you can implement to better integrate these strengths into your work environment and with those you lead?

What were your five lowest scoring areas? (The five lowest scoring questions on the assessment.)

- 1.
- 2.
- 3.
- 4.
- 5.

What are some strategies that you can implement to overcome these weaknesses to more positively impact your work environment and those you lead?

- 1.
- 2.
- 3.

What additional support/coaching/training do you need in order to increase your effectiveness as a Values-Based Leader?

- 1.
- 2.
- 3.

## QUALITY VALUES PRODUCTS AND SERVICES

A Research and Consulting Firm whose purpose is to create "Values Based" organizations. Emphasis is placed on integrating the Quality Values into the culture at all levels...leaders, teams and individuals. A "Values Based" organization will move continually up the excellence curve, achieving customer preference and increased market share.

### ASSESSMENTS

#### Organizational Assessments

- Cultural Transformation Assessment
- Staff Satisfaction Assessment
- Organizational Climate Assessment
- Management Competency Assessment
- Knowledge Competency Assessment
- Total Team Assessment
- The Six Sigma Assessment

#### Self Assessments

- Self Management Assessment
- Relationship Assessment
- Leadership Assessment
- Am I A Team Player? Assessment
- Sales Professional Assessment
- Youth Assessments
- Assessments for Teachers

### RESEARCH

- End of Course/Instructor Evaluations
- OMR Data Collection and Reporting
- Online Data Collection and Reporting
- Customer Satisfaction Survey
- Market Research
- Conference & Exposition Evaluations
- Outcomes Research
- Custom Research

### PUBLICATIONS

- Quality Values Book
- Self Scoring Assessment Software
- Train the Trainer Courses
- New Science of Customer Satisfaction
- Assessments and Workbooks
- What is Natural Excellence?
- How to Create Organizational Culture?

### CONSULTING

- Knowledge Management
- Moving Towards Excellence
- Organizational Cultural Change
- Strategic Planning
- Team Development

### TRAINING

- Customer Focused Organization
- Partnership and Commitment
- Sales Professional Effectiveness
- Teamwork Workshops
- World Class Leadership

## CONTACT US TODAY

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