

CONFIDENTIAL

# *LevelSet: Early Feedback*

for

**SAMPLE Leader**

**Sample Organization**

**Month Day, Year**

## Rater Response

Self	1 of 1
Hiring Manager	1 of 1
Peers	6 of 6
Direct Reports	5 of 5
Skip-level Reports	6 of 6
Other	5 of 6

## Congratulations on Your New Role!

And on your organization recognizing that Leaders entering a new role or company can face significant challenges. In today's business climate, all Leaders starting new jobs are expected to drive quick results, and do so in a sustainable way. This requirement makes every New Leader transition more complex, and thus more challenging.

Research indicates that certain New Leader behaviors are associated with long-term effectiveness (within the role and the organization). The survey items contained in this report have been found to be predictive of New Leader success. Based on input from you, your Hiring Manager, Peers, HR Partner, Direct Reports, Skip-level Reports, and Other stakeholders, a composite view of your early effectiveness is presented here.

*LevelSet: Early Feedback is:*

- A snapshot of key stakeholder perspectives early in your tenure
- Developmental, confidential, and focused on your transition
- Honest, constructive feedback that leads to appropriate action

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## Get the Most Out of Your Feedback

### Consider:

- Your definition of success in the new role.
- Three ways you could be more effective in the role and during the transition.
- Your openness to receiving feedback from your colleagues.
- How your actions and transition affect others.

### During the feedback meeting:

- See the feedback as a whole.
- Look for patterns and themes.
- Look for differences among rater groups. Think about how you may behave differently with/towards each group.
- Note whether your perception is consistent with how other rater groups see you.
- Consider the risk that might be signaled by perceptual gaps.

### Reflect:

- Consider similarities and differences from other feedback you've received:
  - Progress on development;
  - Similar feedback about specific behaviors.
- Your effectiveness over time in feedback areas.

### Understand your feedback:

- Schedule follow-up meetings:
  - Seek information about confusing or apparently inconsistent feedback;
  - Openly listen and learn the ways each individual thinks you could be more effective.

### Plan Action:

- Summarize the key points of the feedback (use template in the *Action Plan* section).
- Identify potential development opportunities directly related to effectiveness in your new role.
- Finalize no more than two.
- Commit to a timeline for creating and implementing an *Action Plan*.

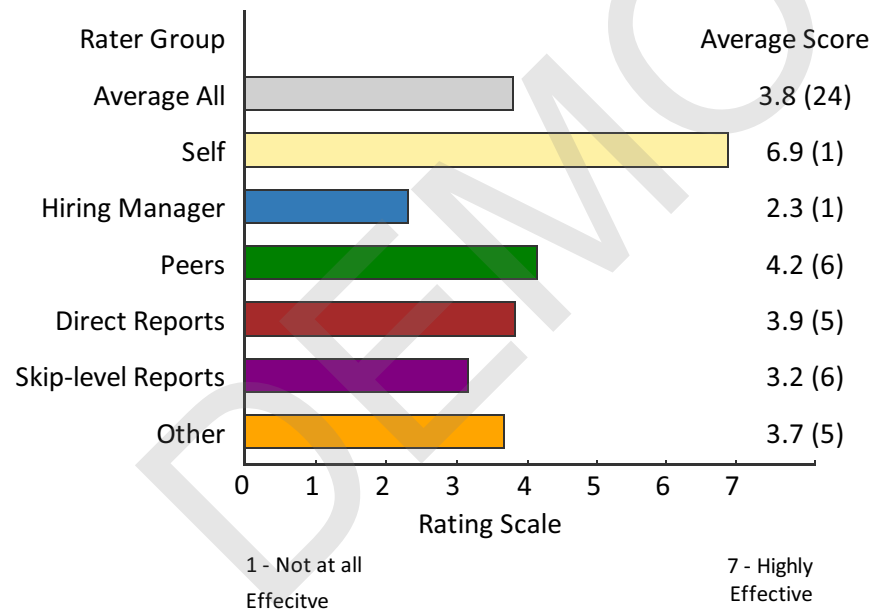
### Follow up:

- Review draft *Action Plan* with your Hiring Manager and HR Partner.
- Incorporate any suggestions.
- Ask for feedback from key stakeholders while you are working your *Action Plan*.
- Listen for unsolicited feedback that signals improved effectiveness.
- For an average overall score of 5.5 or below, consider conducting a second *LevelSet: Early Feedback* survey 3-6 months after the first survey. (The second set of data will allow you to compare scores and gauge your progress.)

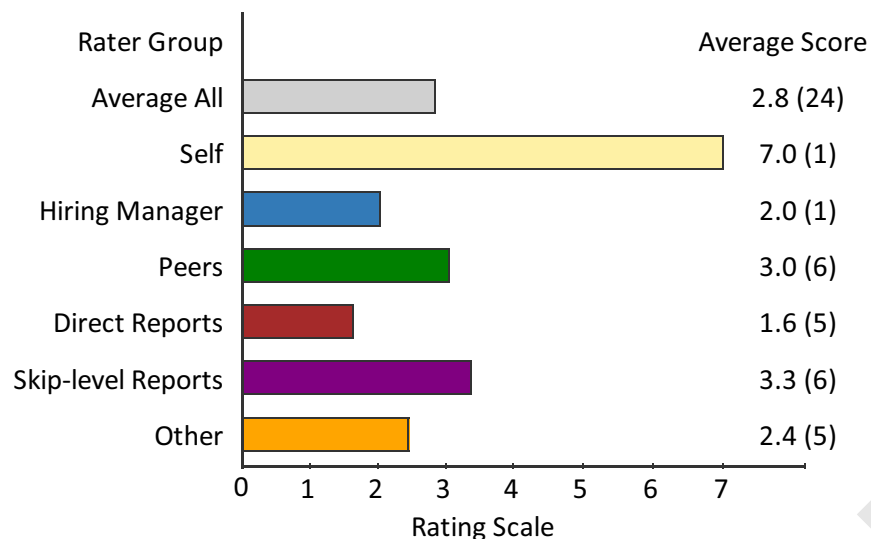
# SAMPLE Leader

## Organization: SAMPLE

### Summary of all responses for all survey questions



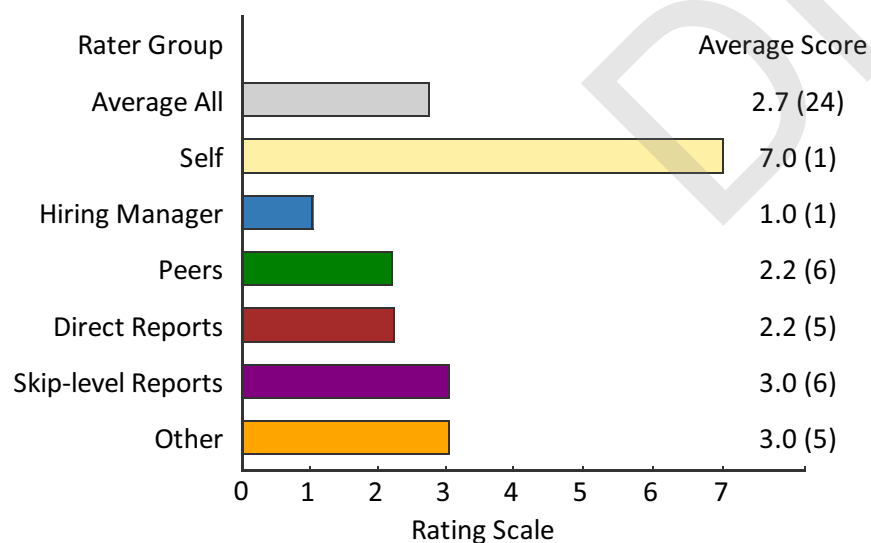
## 1. Seeks input from the right people, in the right way, at the right time.



### Comments:

- Strategic partners listen to each other. I make that reminder frequently.
- Not really...seems to only want to hear my agreement.
- Listens, but seems to have a response before getting clarity around what is being said.
- Seems to prefer the sound of own voice.
- I listen, but only to those who have something worthwhile to say...

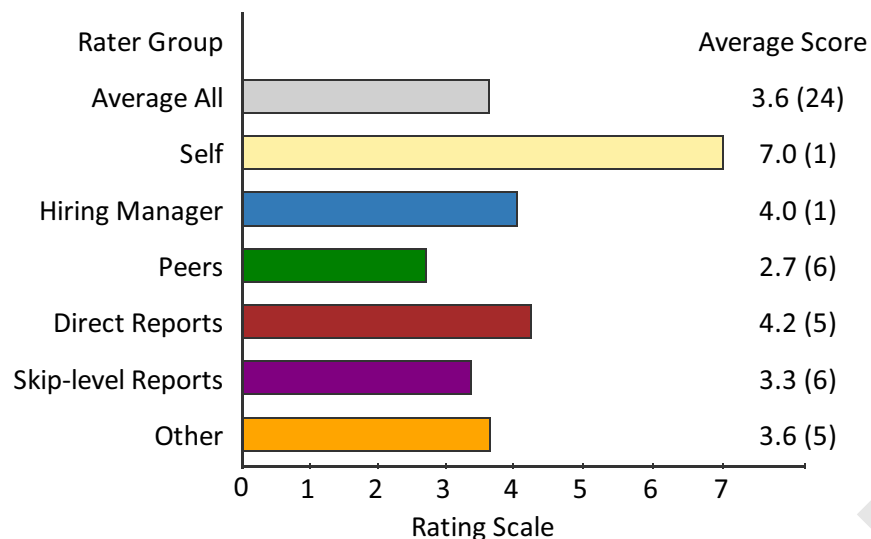
## 2. Uses a variety of leadership approaches, depending on the situation.



### Comments:

- Supports own initiatives, doesn't seem interested in others.
- I'm good at this, but coalitions aren't necessary.
- Very good at knowing who is needed to help get things done.
- Able to maneuver through sticky situations and find support for things many of my other strategic partners find impossible. Not sure it is done though.

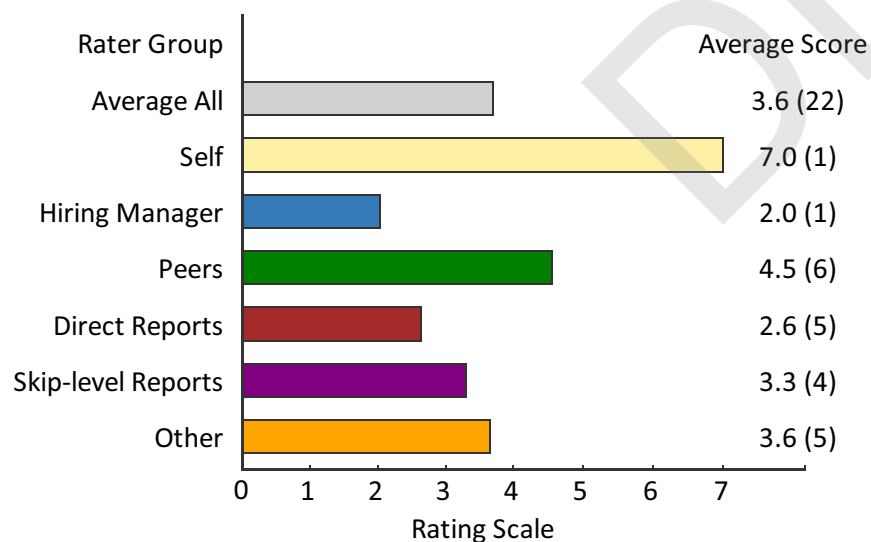
13. Balances sharing best practices from elsewhere with the search for, and adoption of, internal/existing best practices.



**Comments:**

- Relies on what has been effective before.
- My best practices from elsewhere are clearly superior to anything these people could have come up with.

14. Is appropriately patient and skillful in sizing up talent, and demonstrates willingness to cultivate the development of team members.



**Comments:**

- Assesses talent well and wants to see them succeed. Seems quick to let people go that don't seem to be working out. Too quick at times.
- Sizes up talent, feels that their skill should be brought by them, and really doesn't recognize development as needed.
- Seems skillful in sizing up talent, but is not patient.
- If they don't have it, they don't last.

# Action Plan for. \_\_\_\_\_

## Identify two primary themes of my feedback

For example: Do I need to be more effective at *Building Relationships, Understanding Differences in the Organizational Culture, Seeking to Understand before Being Understood*, or in some other area?

Theme #1 \_\_\_\_\_

Theme #2 \_\_\_\_\_

Theme #1: \_\_\_\_\_

**What's at risk** if I don't take action on this theme?

**What will you do this month?** Use "Taking Action on Your *LevelSet: Early Feedback*" (see pages immediately following).

What **things about my organization/work context** could stop me from taking action?

**What will you do next month?**

What **things about me** could stop me from taking action?

**How will you know** if things have improved?

Feedback from others?

- 

Behavior changes?

- 

Identify and Connect with **Potential Coaches/Mentors**:

**Identify Feedback Providers** (see rater list for ideas):

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- 
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-



# Taking Action on Your *LevelSet: Early Feedback*

Now that you've received your feedback, it's important to take action to strengthen areas of concern to you. If you have one, an *OnBoarding RoadMap* (or *OnBoarding Objectives*) can be additional useful tools in identifying strategies to enhance your alignment.

If you had a lower score on:	Consider these questions to determine potential causes for that low rating:	Some options for action include:
1. Seeks input from the right people, in the right way, at the right time.	<ul style="list-style-type: none"> <li>■ To what extent do your key initiatives support desired business results?</li> <li>■ What are your key initiatives that require the input of others?</li> <li>■ What other initiatives may not require the input of others but could be implemented more quickly and/or effectively with their buy-in?</li> </ul>	<ul style="list-style-type: none"> <li>■ Create a comprehensive list of key stakeholders and their deliverables and key initiatives. Confirm priority levels with your Hiring Manager:               <ul style="list-style-type: none"> <li>– What impact do they have on the initiatives of others?</li> <li>– How can you learn more about this?</li> </ul> </li> <li>■ Identify a comprehensive list of key initiatives you own:               <ul style="list-style-type: none"> <li>– How do your initiatives integrate with others'?</li> <li>– How have you been approaching the process of seeking input?</li> <li>– How have you incorporated their suggestions and addressed their concerns?</li> <li>– How have you communicated when you found you could not incorporate their ideas or address their concerns?</li> </ul> </li> <li>■ In seeking input in those situations:               <ul style="list-style-type: none"> <li>– Are you asking questions that encourage their contribution?</li> <li>– Do you treat these secondary stakeholders as important by seeking them out proactively?</li> <li>– Do you listen carefully, and ask probing questions?</li> <li>– Are you asking how this initiative will impact them (both positively and negatively)?</li> </ul> </li> </ul>

**LevelSet Facilitator:**

Facilitator's Name:

E-mail:

Phone Number:

**Please complete the following:**

*Select values from drop-down lists:*

LevelSet: Early Feedback version:

Has at least 3 or more in each rater category (except Self and Hiring Manager):

List has been approved by Hiring Manager and/or HR Partner:

If list includes more than 25 raters, cost is approved at \$15.00 per additional rater:

High Touch Follow-up \$50.00:

Hard copy of report requested \$50.00:

Mailing address:

Overnight Shipping (within the U.S.) \$30.00:

Notes:

**New Leader:**

To enhance your overall effectiveness, your Hiring Manager, Peers, Direct Reports, a sampling of Skip-level Reports and Other stakeholders will be asked to provide you *LevelSet: Early Feedback*. They will use a web-enabled tool to help you develop a snapshot of the effectiveness of your transition. Please choose up to **25** key stakeholders that will be able to provide feedback.

#	Stakeholder name	Relationship category <i>(select from drop-down only)</i>	Email	Phone	Language <i>(leave blank for English)</i>
1	<New Leader Name>	<b>Self</b>			
2		<b>Hiring Manager</b>			
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# LevelSet: Early Feedback Survey Specifications

## The Rating Scale:

- Raters are asked to rate the New Leader's effectiveness on a scale of 1 – 7, where 1=Not at all Effective and 7=Highly Effective.
- They are also given the opportunity to opt out on individual items (which they may not feel qualified to answer) by indicating a rating of N/A.
- An average score of 6.0 or higher on an item typically indicates a high level of effectiveness in that area.
- An average item score of 5.0 or lower indicates an area of potential concern, with further exploration and action recommended.

## Raters:

- *LevelSet: Early Feedback* provides for a maximum of 25 raters (additional raters may be included for a nominal fee).
- There are six Rater Groups:
  - New Leader (Self)
  - Hiring Manager(s) – can include both a Hiring Manager and Dotted-line Manager, if appropriate
  - Peers (those who also report directly to the Hiring Manager)
  - Direct Reports (recommend including all members of this group)
  - Skip-level Reports (A sampling of those who report to the New Leader's Direct Reports; If the New Leader does not have this level of Reports, this group can be hidden on the report.)
  - Others (This rater group includes those who either are impacted by, or have impact on, the New Leader's role.)

## Rater Anonymity:

- Only the New Leader and Hiring Manager(s) ratings will be represented as an N=1. Their numerical ratings will be broken out separately and identified as their own. Their comments remain anonymous (as do all comments for all Raters).
- If fewer than 3 raters are listed on the Rater Identification list for any Rater Group (other than Self or Hiring Manager), the survey will not be launched until a total of at least 3 potential Raters are represented (or, if none can be added, they will be switched to the Rater Group that most appropriately represents them).
- Each Rater Group has an item-level threshold for anonymity (for rater responses less than the threshold, those Rater numerical responses will be rolled into Average All totals). The following number of raters are required from each Rater Group in order to have Group-level results reported for that Rater Group:
  - New Leader (Self) N=1
  - Hiring Manager N=1
  - Peers N=2
  - Direct Reports N=3
  - Skip-level Reports N=3
  - Others N=2

## Data and Debriefing Confidentiality:

- All Certified *LevelSet* Facilitators are required to sign a Confidentiality Agreement that specifies:
  - All data are to be held confidential between the New Leader and the Facilitator.
  - There will be no copies of the data/report shared with anyone else without the express permission of the New Leader (recommend having the New Leader personally hand off the data, if they wish it to be shared).
  - The contents of the debrief conversation are to be held confidential between the New Leader and Facilitator (again, the Leader may choose to share information directly with others, if they wish).