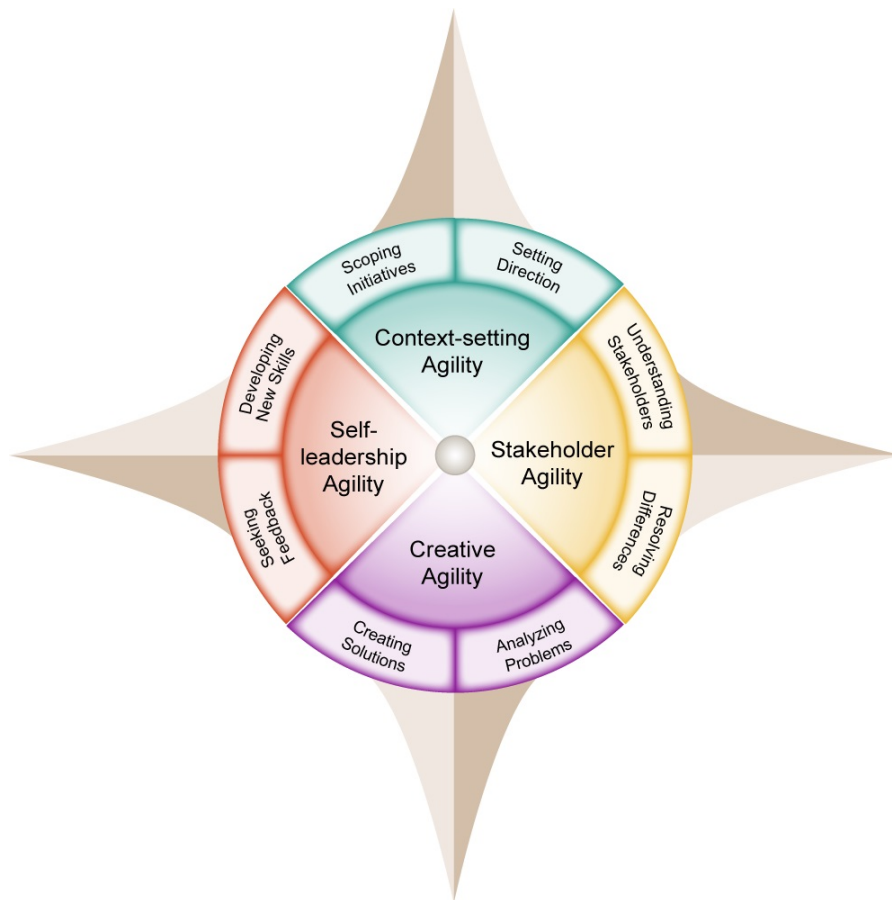# ChangeWise
Leadership Agility® 360

Prepared for Pat Sample
27 Oct 2016

The ChangeWise Model of Leadership Agility

Please read this Introduction before you look at your feedback

Leadership Agility is considered by many to be the "master competency" needed to make wise decisions and take effective action amid complex and rapidly changing conditions.

The Changewise Leadership Agility 360 is based on *Leadership Agility*, an extensively researched book written by ChangeWise principals Bill Joiner and Stephen Josephs. The Assessment and the companion Feedback Report and Development Planner were developed in partnership with Cambria Consulting.

To understand the feedback in this report, you need to understand the framework upon which it is based. In this model, leadership is not a position. Leadership is **action taken with an intention to change something for the better**. In the language of this model, any activity consistent with this description is a **leadership initiative**. You can take leadership initiatives whether or not you have authority over those with whom you work.

3 Action Arenas

You can take leadership initiatives in three distinct **action arenas**. Each arena requires its own leadership skill set, so this report assesses your level of leadership agility in each of these three action contexts:

- **Engaging in pivotal conversations:** person-to-person discussions with important outcomes at stake
- **Improving team performance:** initiatives to improve a team and/or its relationship with its larger environment
- **Leading organizational change:** initiatives to improve an organization and/or its relationship with its larger environment

24 Leadership Agility Practices - 8 in Each Action Arena

Within each of these three arenas, this report provides feedback on 8 "leadership agility practices." These practices group into four types of agility as outlined below:

Context-setting Agility

- Scoping Initiatives
- Setting Direction

Stakeholder Agility

- Understanding Stakeholders
- Resolving Differences

Creative Agility

- Analyzing Problems
- Creating Solutions

Self-leadership Agility

- Seeking Feedback
- Developing New Skills

Each Leadership Agility Practice has 3 Levels

The research underlying this model shows that professionals grow through three specific stages, or levels, as they increase their leadership agility: **Expert, Achiever**, and **Catalyst**. This report identifies the perceived level of agility with which you engage in each of the 24 practices referenced above.

These levels are described in more detail on page 3.

Guidance for Reviewing Your Report

If you have not already, before you review the feedback in this Report, use page 2 of your Leadership Agility 360 Development Planner to identify the primary "leadership initiatives" you are or will soon be taking.

The Development Planner also includes pages that will be help you translate your feedback into an Action Plan that identifies specific leadership practices you want to work on. At the end of this process, you'll want to think through how the practices you choose will help you to carry out your leadership initiatives.

Section 1: Roll-up Charts

This section has charts that summarize your quantitative feedback on your overall level of leadership agility, as well as your agility level in three "action arenas": pivotal conversations, leading teams, and leading organizational change.

Section 2: Written Feedback Comments

This section presents written comments from your various feedback provider groups: Your manager(s), direct reports, and stakeholder group(s), as well as your own comments. These feedback comments are organized into the three action arenas. Within each arena, comments are presented in random order to help preserve their anonymity.

Section 3: Detailed Feedback on 24 Leadership Agility Practices

In this section you'll find detailed charts that capture feedback on each of the 24 leadership agility practices covered in this report. Within this section, there are three pages of charts, each page focusing on one of the three action arenas outlined above.

Section 4: Summaries of your Most and Least Agile Practices

This section contains six pages that summarize:

- Your Six Most Agile Practices
- Your Six Least Agile Practices
- A visual overview of the 24 leadership agility practices, highlighting the most and least agile, and also those areas where there are significant gaps between others' perceptions and your perception of yourself

Section 5: Details on Distribution of Ratings

The two pages in this final section present charts that show, for each type of feedback provider, the distribution of ratings in the three action arenas and overall.

Section 1: Agility Levels

In this assessment, what does your agility level mean?

Extensive research, described in the award-winning book, Leadership Agility, has shown that managers develop agility by growing through a predictable sequence of agility levels: Expert, Achiever, and Catalyst. At each level you retain the capabilities you developed at previous levels, and you can still use these capabilities as needed.

Expert Level

This agility level is most effective in relatively stable organizational environments where success can be achieved by making incremental improvements in existing strategies, where you have clear authority. When you lead at the Expert level, you rely on authority and expertise, your focus is tactical, you rarely attempt to influence matters that go beyond your authority, you have a strong problem-solving orientation, and you're strongly motivated to develop your own technical and/or functional expertise.

Achiever Level

This agility level is most effective in organizational environments where success requires periodic cross-functional changes in strategy. When you lead at the Achiever level, you motivate others by making it challenging and satisfying to contribute to larger outcomes. Your focus is strategic, you work to gain buy-in from key stakeholders, you excel at cross-functional problem solving, and you are strongly motivated to develop the competencies needed for effective management and leadership.

Catalyst Level

This agility level is most effective in rapidly changing organizational environments, requiring significant coordination across multiple boundaries. When you lead at the Catalyst level, you provide visionary leadership while engaging diverse stakeholders in collaborative dialogs and creative problem solving. Your focus is on developing empowered organizations and teams capable of sustained success, which foster both personal and professional growth.

Transition Phases

During transitional phases, you demonstrate mastery of the previous agility level and engage in some behaviors characteristic of the next level. You may be consciously attempting to lead in new ways and/or you may feel a bit stuck between two different ways of leading. When you are in a transitional phase of development, it is useful to be very clear about the ways in which the next level of agility differs from and builds upon the one you have already mastered.

Which level of Leadership Agility is optimal for you?

Unlike traditional 360s with their 1-5 or 1-7 point scales, the optimal place for you to be is not necessarily at the highest point on the scale, though it may be. As noted in the descriptions above, your optimal level of leadership agility depends on your role and on the following two aspects of your work environment:

- the pace of change
- the level of interdependence in your work environment, i.e., the extent to which your success depends on cooperation from those over whom you have no authority

The Changewise research on Leadership Agility shows that, as the pace of change increases and interdependencies grow, you need to develop higher levels of agility to enjoy consistent success as a leader.

Section 1: How the Roll-up Charts are Constructed

The Charts

The charts on the next page provide an overview or "roll-up" of results from the 24 quantitative questions referenced on Page 2. These charts are high-level summaries of the more detailed feedback charts presented in Section 3. Between each level of agility is a transition phase. All charts show the three levels and the two transition phases between them.

The "Bird's Eye View" chart shows your overall "leadership agility level," as perceived distinctly by yourself and each of your different feedback sources (manager, direct reports, stakeholders).

The other 3 charts on the next page show your perceived agility level in each of three leadership "arenas." The summary ratings for each arena are calculated by averaging the ratings across the 8 leadership agility practices for that arena for each source of feedback.

- Engaging in pivotal conversations
- Improving team performance
- Leading organizational change

How the Roll-up Charts on the Next Page are Calculated

The summary ratings for an arena are calculated by averaging the ratings across the 8 leadership agility practices for that arena for each source of feedback.

The "All Others" rating is calculated by first averaging the ratings for each feedback category (manager, direct reports, and stakeholders). Second, the average of these four averages is calculated. This way, all sources of feedback count equally.

Maintaining Anonymity and Handling Insufficient Responses

To retain the anonymity of direct reports and stakeholders, their feedback is presented in aggregate form. If only one direct report or one stakeholder completed an assessment, their responses will be combined in the stakeholder group.
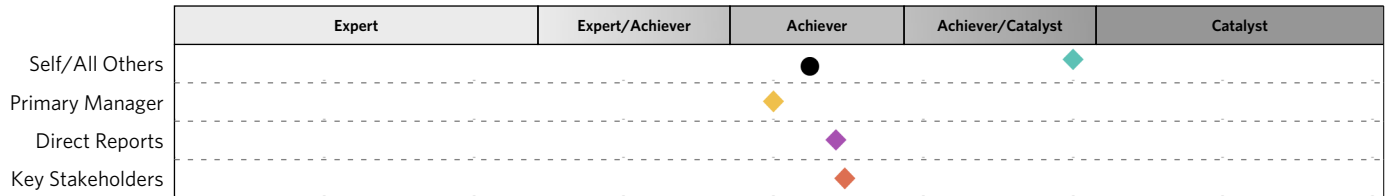
Section 1: Roll-up Charts
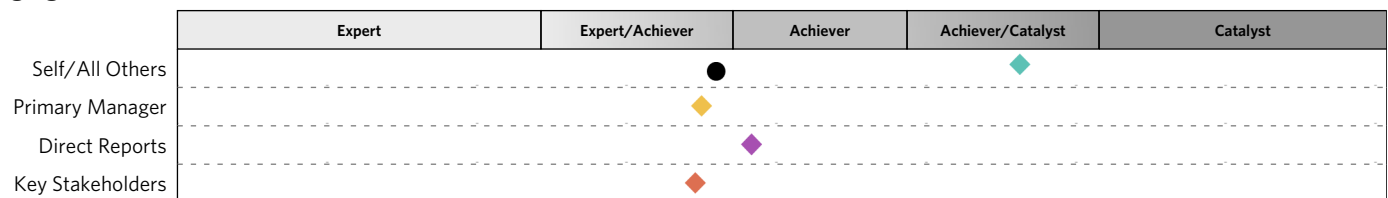
How to Interpret these Charts

Focus on the "All Others" rating in the first chart, then note where this rating falls in the three action arena charts below it. What is the pattern you see? In which arena are you seen as most agile? Least agile? Do the same for the self-assessment rating. For a more nuanced view, do the same for the other feedback sources: Manager(s), Direct Report, and Stakeholders. If there are large differences in the way different groups see you, think about what might cause them to view you differently.

● = All Others

Leadership Agility - Bird's Eye View

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Self/All Others			●	◆	
Primary Manager		◆			
Direct Reports			◆		
Key Stakeholders			◆		

Engaging in Pivotal Conversations

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Self/All Others			●	◆	
Primary Manager		◆			
Direct Reports			◆		
Key Stakeholders		◆			

Improving Team Performance

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Self/All Others			●	◆	
Primary Manager		◆			
Direct Reports			◆		
Key Stakeholders			◆		

Leading Organizational Change

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Self/All Others			●	◆	
Primary Manager		◆			
Direct Reports			◆		
Key Stakeholders		◆			

Section 2: Written Feedback - Engaging in Pivotal Conversations
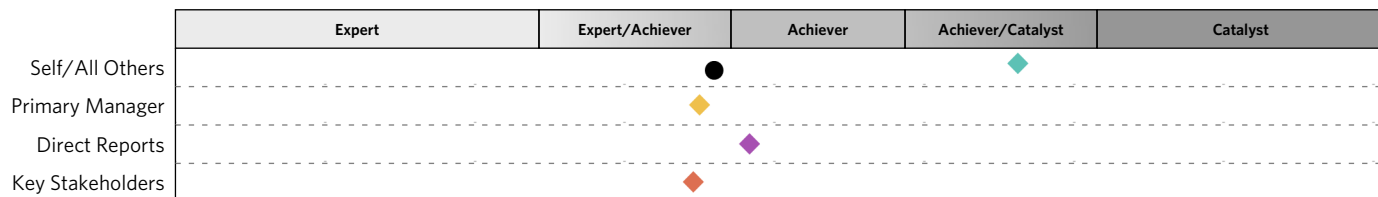
	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Self/All Others		●		◆	
Primary Manager		◆			
Direct Reports			◆		
Key Stakeholders		◆			

Perceived Strengths

Comments from your Primary Manager

Comments from your Direct Reports

Comments from your Key Stakeholders

Perceived Needs for Improvement

Comments from your Primary Manager

Comments from your Direct Reports

Comments from your Key Stakeholders

Section 2: Written Feedback - Improving Team Performance

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Self/All Others			●	◆	
Primary Manager			◆		
Direct Reports			◆		
Key Stakeholders			◆		

Perceived Strengths

Comments from your Primary Manager

Comments from your Direct Reports

Comments from your Key Stakeholders

Perceived Needs for Improvement

Comments from your Primary Manager

Comments from your Direct Reports

Comments from your Key Stakeholders

Section 2: Written Feedback - Leading Organizational Change

	Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst
Self/All Others			●	◆	
Primary Manager		◆			
Direct Reports			◆		
Key Stakeholders		◆			

Perceived Strengths

Comments from your Primary Manager

Comments from your Direct Reports

Comments from your Key Stakeholders

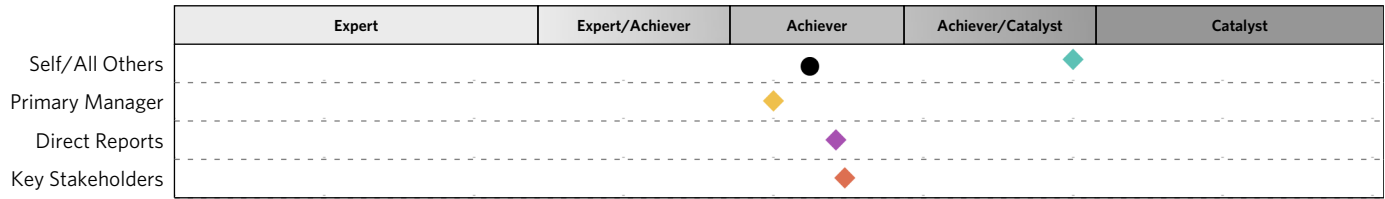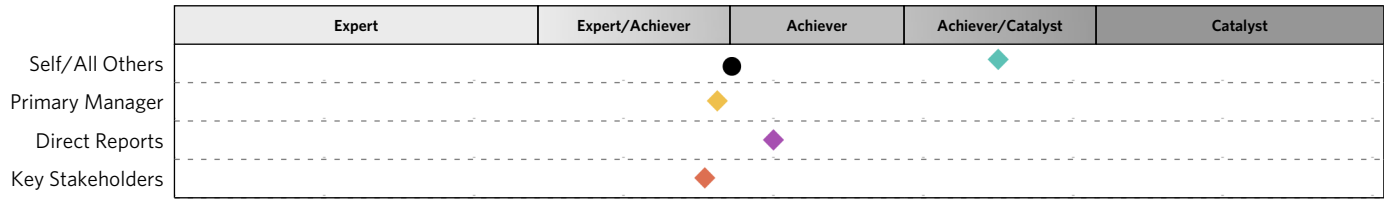## Perceived Needs for Improvement

Comments from your Primary Manager

Comments from your Direct Reports

Comments from your Key Stakeholders

Section 3: Detailed Feedback on 24 Leadership Agility Practices

Overview of Detailed Feedback Charts

On the six pages in this section, you'll find detailed charts that capture your feedback on each of the 24 leadership agility practices covered in this report. To put these practices into practical contexts, there are 8 leadership agility practices in each of three action arenas:

- Engaging in pivotal conversations
- Improving team performance
- Leading organizational change

Highlighted Leadership Agility Practices

On the following pages, you'll find symbols in the left-hand margin of some of the charts that identify leadership agility practices to which you'll probably want to give special attention:

➕ This symbol indicates a practice that is perceived by "all others" as being among your **six most agile**.

➖ This symbol indicates a practice that is perceived by "all others" as being among your **six least agile**.

◖ This symbol indicates a practice where there is a gap of "half a leadership agility level or more" between your self-assessment and the assessments of "all others".

For your convenience, Section 4 of this Report summarizes your **six most agile** practices, your **six least agile** practices.

Section 3: Engaging in Pivotal Conversations

Chart of 8 Leadership Agility Practices used in Pivotal Conversations appears on this page

Section 3: Improving Team Performance

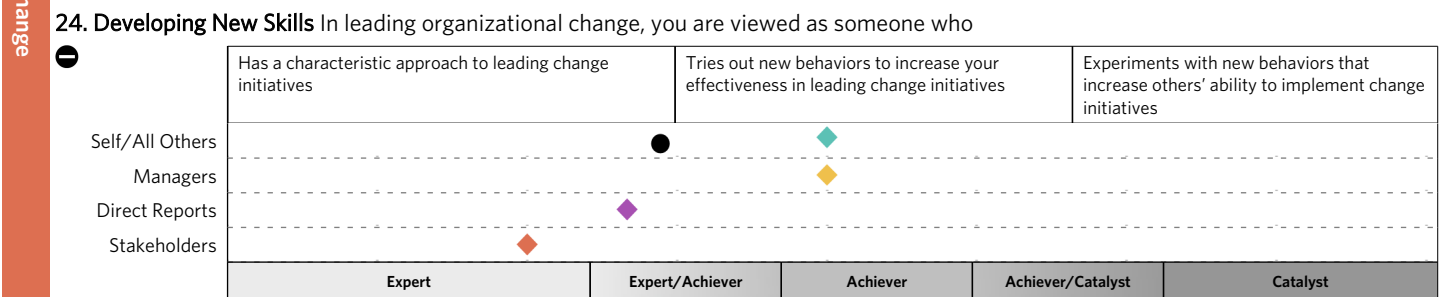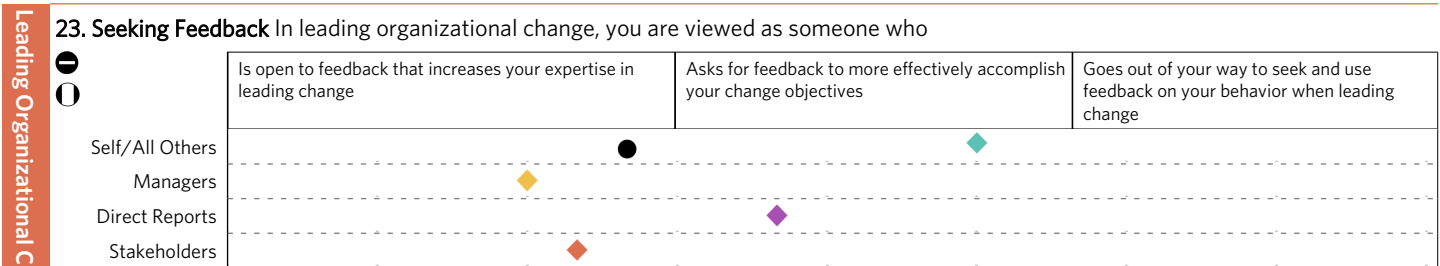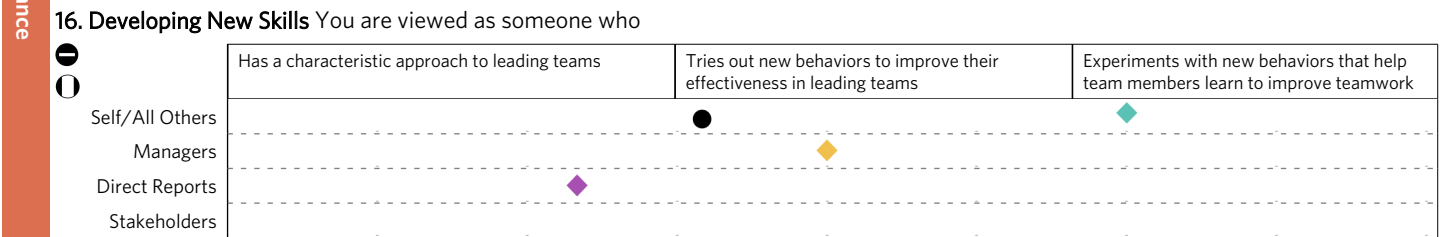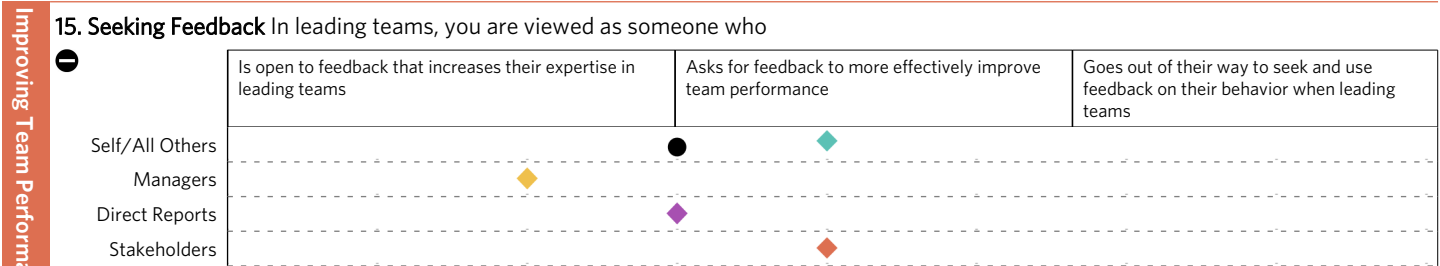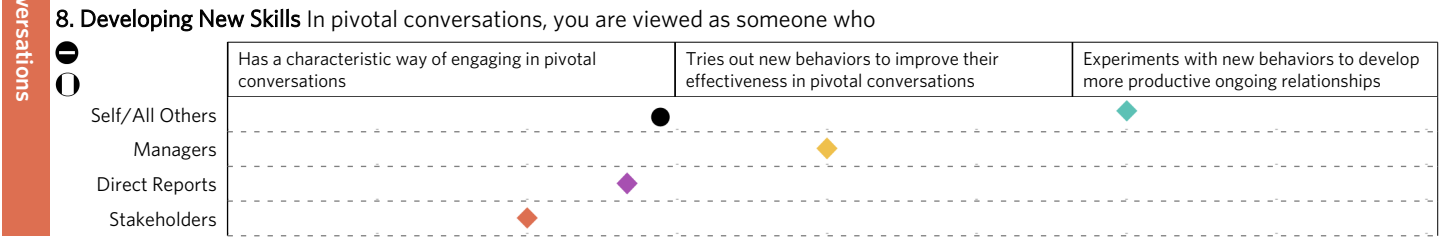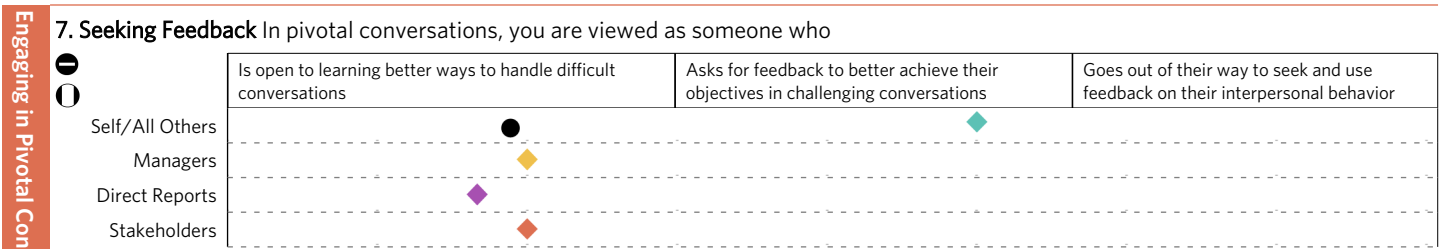## Context-setting Agility

9. Scoping Initiatives When seeking to improve your team's performance, you

➕
◯

	Make needed changes in personnel or in the team's work procedures	Improve team internal processes and external relations	Radically improve the team's culture and external relations
Self/All Others		●	◆ (teal)
Managers		◆ (yellow)	
Direct Reports			◆ (purple)
Stakeholders		◆ (orange)	

10. Setting Direction When seeking to improve your team's performance, you

➕

	Focus on incremental changes and improvements	Initiate changes intended to improve both short- and long-term performance	Create an energizing, breakthrough vision for short- and long-term change
Self/All Others		●	◆ (teal)
Managers		◆ (yellow)	
Direct Reports		◆ (purple)	
Stakeholders		◆ (orange)	

Stakeholder Agility

11. Understanding Stakeholders When seeking to improve your team's performance, you

➕

	Anticipate which team members will need to make the most adjustments	Seek to understand team members' views about needed changes	Solicit and openly consider team members' contrary views about needed changes
Self/All Others		●	◆ (teal)
Managers		◆ (yellow)	
Direct Reports			◆ (purple)
Stakeholders		◆ (orange)	

12. Resolving Differences When team members resist making changes in team functioning, you

◯

	Listen to the views of team members but primarily rely on your own judgment	Ask for and consider team member views while advocating your own views	Initiate open dialogue that genuinely considers and addresses team member reservations
Self/All Others		●	◆ (teal)
Managers		◆ (yellow)	
Direct Reports		◆ (purple)	
Stakeholders		◆ (orange)	

Creative Agility

13. Analyzing Problems When analyzing team performance problems, you

➕
◯

	Meet with individual team members to discuss these problems	Bring discussion of these problems into team meetings	Lead whole-team problem-solving to address tough, underlying issues
Self/All Others		●	◆ (teal)
Managers			◆ (yellow)
Direct Reports		◆ (purple)	
Stakeholders		◆ (orange)	

14. Creating Solutions When making decisions about how to improve team performance, you

	Rely on your own experience to solve these problems	Draw on team discussions to solve these problems	Lead participative discussions with team members to develop breakthrough solutions
Self/All Others		● ◆ (teal)	
Managers	◆ (yellow)		
Direct Reports		◆ (purple)	
Stakeholders		◆ (orange)	

Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

● All Others ⊖ Least ✚ Most ◖ Gap

Chart of 8 Leadership Agility Practices used in Leading Organizational Change appears on this page

Section 3: Self-leadership Agility

Engaging in Pivotal Conversations

7. Seeking Feedback In pivotal conversations, you are viewed as someone who

Is open to learning better ways to handle difficult conversations	Asks for feedback to better achieve their objectives in challenging conversations	Goes out of their way to seek and use feedback on their interpersonal behavior

Self/All Others
Managers
Direct Reports
Stakeholders

8. Developing New Skills In pivotal conversations, you are viewed as someone who

Has a characteristic way of engaging in pivotal conversations	Tries out new behaviors to improve their effectiveness in pivotal conversations	Experiments with new behaviors to develop more productive ongoing relationships

Self/All Others
Managers
Direct Reports
Stakeholders

Improving Team Performance

15. Seeking Feedback In leading teams, you are viewed as someone who

Is open to feedback that increases their expertise in leading teams	Asks for feedback to more effectively improve team performance	Goes out of their way to seek and use feedback on their behavior when leading teams

Self/All Others
Managers
Direct Reports
Stakeholders

16. Developing New Skills You are viewed as someone who

Has a characteristic approach to leading teams	Tries out new behaviors to improve their effectiveness in leading teams	Experiments with new behaviors that help team members learn to improve teamwork

Self/All Others
Managers
Direct Reports
Stakeholders

Leading Organizational Change

23. Seeking Feedback In leading organizational change, you are viewed as someone who

Is open to feedback that increases your expertise in leading change	Asks for feedback to more effectively accomplish your change objectives	Goes out of your way to seek and use feedback on your behavior when leading change

Self/All Others
Managers
Direct Reports
Stakeholders

24. Developing New Skills In leading organizational change, you are viewed as someone who

Has a characteristic approach to leading change initiatives	Tries out new behaviors to increase your effectiveness in leading change initiatives	Experiments with new behaviors that increase others' ability to implement change initiatives

Self/All Others
Managers
Direct Reports
Stakeholders

Expert	Expert/Achiever	Achiever	Achiever/Catalyst	Catalyst

Section 4: Summaries of your Most and Least Agile Practices

Overview of this Section

In this section, you'll find summaries of key leadership agility practices identified in the previous section:

- The 1st page summarizes your **six highest rated** leadership agility practices. They are ordered by the "All Other" rating.

- The 2nd page summarizes your **six lowest rated** leadership agility practices. They are ordered by the "All Other" rating.

- The 3rd page gives you an overview chart of the 24 leadership agility practices, highlighting patterns among your "most agile" and "least agile" practices.

Focus on Areas of Strength as well as Areas that may need Improvement

Most 360-degree feedback recipients gloss over their strengths and focus primarily on the areas for improvement. This report and its companion Development Planner are designed to help you affirm and build on your strengths, as well as work on your improvement opportunities.

So give yourself time to think about those practices where you are viewed as most agile, as well as those that are among your least agile. It is certainly an option to take steps that will build on your strengths, and also use your existing strengths to improve areas where you are less agile. For example, let's say that you are very effective in setting context for organizational change initiatives, but less effective in doing this in important conversations. You can apply the strength you have in one action arena to make improvements in another arena.

Section 4: Your Six Highest Rated Leadership Agility Practices

Charts on this page capture recipient's 6 Highest Rated Leadership Agility Practices

Section 4: Your Six Lowest Rated Leadership Agility Practices

Charts on this page capture recipient's 6 Lowest Rated Leadership Agility Practices

Section 4: Overview of your Leadership Agility Practices

⚊ Least   ✚ Most   ◖ Gap

The chart on this page captures the results from the previous pages - all on one page

Section 5: Details on Distribution of Ratings

The charts on this page show a different view of the feedback charts found in Section 1 of this Report. In that section, the positioning of icons for types of feedback providers (e.g., direct reports, stakeholders) represent the **median rating** for each leadership agility practice. The charts below allow you to see the distribution of ratings within each feedback provider category.

Note: In the chart below, the numbers shown in columns 1-9 are percentages. More specifically, these numbers refer to the percentage of **ratings**, **not** percentage of **raters**. Details about these calculations are provided below under "Numerical Scoring" and "Key to Ratings."

Distribution of Overall Leadership Agility Ratings

Source	n		EXPERT 1	EXPERT 2	EXPERT 3	ACHIEVER 4	ACHIEVER 5	ACHIEVER 6	CATALYST 7	CATALYST 8	CATALYST 9	Est. L.A. level
Self	1		-	-	-	-						Achiever/Catalyst
All Others	7											Achiever
Primary Manager	1		-	-								Expert/Achiever
Direct Report	3											Achiever
Key Stakeholder	3		-									Achiever

Numerical Scoring

In the assessment, there were 9 buttons for each item, three allocated to each agility level. Each button is given a numerical value (1-9). For example, if someone perceived you as behaving within the Achiever range for a particular item (leadership practice), and felt that you are highly effective in carrying out this behavior, your numerical score for this item would be **6**.

Key to Ratings

Numerical ratings are translated into agility level assessments as follows:

Numerical Rating	Agility Level
Score = 1.00 and < 3.50	Expert
Score = 3.50 and < 4.75	Expert/Achiever
Score = 4.75 and < 6.00	Achiever
Score = 6.00 and < 7.25	Achiever/Catalyst
Score = 7.25 and < 9.00	Catalyst

Section 5: Details on Distribution of Ratings

This page show the statistical distributions for the roll-up charts presented in Section 1 for each of the three action arenas.

Agility when **Engaging in Pivotal Conversations**

Source	n		1	2	3	4	5	6	7	8	9	Est. L.A. level
			EXPERT			ACHIEVER			CATALYST			
Self	1											Achiever/Catalyst
All Others	7											Expert/Achiever
Primary Manager	1											Expert/Achiever
Direct Report	3											Achiever
Key Stakeholder	3											Expert/Achiever

Percentage of ratings on the 8 items for this Arena

Agility when **Improving Team Performance**

Source	n		1	2	3	4	5	6	7	8	9	Est. L.A. level
			EXPERT			ACHIEVER			CATALYST			
Self	1											Achiever/Catalyst
All Others	7											Expert/Achiever
Primary Manager	1											Expert/Achiever
Direct Report	3											Achiever
Key Stakeholder	3											Expert/Achiever

Percentage of ratings on the 8 items for this Arena

Agility when **Leading Organizational Change**

Source	n		1	2	3	4	5	6	7	8	9	Est. L.A. level
			EXPERT			ACHIEVER			CATALYST			
Self	1											Achiever/Catalyst
All Others	7											Expert/Achiever
Primary Manager	1											Expert/Achiever
Direct Report	3											Achiever
Key Stakeholder	3											Expert/Achiever

Percentage of ratings on the 8 items for this Arena