



# TTI Talent Insights™

*Coaching Report - Executive Version*

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*"He who knows others is learned.  
He who knows himself is wise."  
—Lao Tse*

**Jeff Doe**

Call Center Representative  
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11-16-2004



# INTRODUCTION

*Where Talent Meets Opportunity™*

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The Talent Insights™ Coaching Report was designed to increase the understanding of an individual's talents. The report provides insight to two distinct areas: behaviors and motivators. Understanding strengths and weaknesses in both of these areas will lead to personal and professional development and a higher level of satisfaction.

The following is an in-depth look at your personal talents in the two main sections:

## SECTION 1: BEHAVIORS

This section of the report is designed to help you attain a greater knowledge of yourself as well as others. The ability to interact effectively with people may be the difference between success and failure in your work and personal life. Effective interaction starts with an accurate perception of oneself.

## SECTION 2: MOTIVATORS

This section of the report provides information on the why of your actions, which with application and coaching, can tremendously impact your valuing of life. Once you know the motivations that drive your actions, you will immediately be able to understand the causes of conflict.



# INTRODUCTION

## Behaviors

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Behavioral research suggests that the most effective people are those who understand themselves, both their strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

A person's behavior is a necessary and integral part of who they are. In other words, much of our behavior comes from "nature" (inherent), and much comes from "nurture" (our upbringing). It is the universal language of "how we act," or our observable human behavior.

In this report we are measuring four dimensions of normal behavior. They are:

- how you respond to problems and challenges.
- how you influence others to your point of view.
- how you respond to the pace of the environment.
- how you respond to rules and procedures set by others.

This report analyzes behavioral style; that is, a person's manner of doing things. Is the report 100% true? Yes, no and maybe. We are only measuring behavior. We only report statements from areas of behavior in which tendencies are shown. To improve accuracy, feel free to make notes or edit the report regarding any statement from the report that may or may not apply, but only after checking with friends or colleagues to see if they agree.

*"All people exhibit all four behavioral factors in varying degrees of intensity."  
—W.M. Marston*



## GENERAL CHARACTERISTICS

*Based on Jeff's responses, the report has selected general statements to provide a broad understanding of his work style. These statements identify the basic natural behavior that he brings to the job. That is, if left on his own, these statements identify HOW HE WOULD CHOOSE TO DO THE JOB. Use the general characteristics to gain a better understanding of Jeff's natural behavior.*

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Jeff can be sensitive to criticism of his work and take it as a personal affront. He may equate work criticism as someone's personal displeasure with him. He is good at creating enthusiasm in others. He likes quality social relationships. He often will become friends with his customers or clients. He tries to influence others through a personal relationship and many times will perform services to develop this relationship. He is usually filled with good intentions, but often lacks the time to fulfill them. He can be friendly with others in many situations, but primarily with groups of established friends and associates. He is sociable and enjoys the uniqueness of each human being. He is optimistic and usually has a positive sense of humor. His goal is to have and make many friends. At work, he is good at maintaining friendly public relations. Jeff has a good sense of urgency. He can be flexible and diplomatic when the situation calls for it.

Jeff will not be overlooked nor uninvolved. He will consistently try to inspire people to his point of view. When he has strong feelings about a particular problem, you should expect to hear these feelings, and they will probably be expressed in an emotional manner. He likes working for managers who make quick decisions. He is good at solving problems that deal with people. Jeff likes to participate in decision making. He prefers not disciplining people. He may sidestep direct disciplinary action because he wants to



## GENERAL CHARACTERISTICS

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maintain the friendly relationship. Decisions are made after gathering facts and supportive data. Because of his trust and willing acceptance of people, he may misjudge the abilities of others.

Jeff is always concerned with other people's feelings and thoughts. He is positive in his approach to dealing with others. He may not understand why everyone doesn't see life as he does! He has a tendency, which he regards as an ability, to talk smoothly, readily and at length. He will optimistically interact with people in an assured, diplomatic and poised manner. Jeff tends to mask some of his directness in friendly terms and is usually recognized as a friendly and trusting person. He has the ability to sense what people want to hear. He then tends to tell people what he thinks they want to hear. He will know many people. He has a tendency to be a name dropper. He may do this without thinking, trying to establish rapport with people he may not know well. Communication can extend from friendly to argumentative discourse.



## VALUE TO THE ORGANIZATION

*This section of the report identifies the specific talents and behavior Jeff brings to the job. By looking at these statements, one can identify his role in the organization. The organization can then develop a system to capitalize on his particular value and make him an integral part of the team.*

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- Has the confidence to do the difficult assignments.
- Self-reliant.
- Can support or oppose strongly.
- Positive sense of humor.
- Accomplishes goals through people.
- Inner-directed rather than tradition-directed--brings fresh ideas for solving problems.
- Pioneering.



## CHECKLIST FOR COMMUNICATING

*Most people are aware of and sensitive to the ways with which they prefer to be communicated. Many people find this section to be extremely accurate and important for enhanced interpersonal communication. This page provides other people with a list of things to DO when communicating with Jeff. Read each statement and identify the 3 or 4 statements which are most important to him. We recommend highlighting the most important "DO's" and provide a listing to those who communicate with Jeff most frequently.*

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Do:

- Flatter his ego.
- Provide "yes" or "no" answers--not maybe.
- Read the body language for approval or disapproval.
- Confront when in disagreement.
- Be brief--be bright--be gone.
- Talk about him, his goals and the opinions he finds stimulating.
- Provide ideas for implementing action.
- Speak at a rapid pace.
- Plan interaction that supports his dreams and intentions.
- Ask for his opinions/ideas regarding people.
- Expect him to return to fight another day when he has received a "no" answer.
- Understand his defiant nature.



## DON'TS ON COMMUNICATING

*This section of the report is a list of things NOT to do while communicating with Jeff. Review each statement with Jeff and identify those methods of communication that result in frustration or reduced performance. By sharing this information, both parties can negotiate a communication system that is mutually agreeable.*

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### Don't:

- Kid around too much, or "stick to the agenda" too much.
- Drive on to facts, figures, alternatives or abstractions.
- Talk down to him.
- Take credit for his ideas.
- Be curt, cold or tight-lipped.
- Hesitate when confronted.
- Ramble.
- Leave decisions hanging in the air.
- Muffle or overcontrol.
- Give him your opinion unless asked.
- Be paternalistic.
- Take credit for his accomplishments.





## COMMUNICATION TIPS

*This section provides suggestions on methods which will improve Jeff's communications with others. The tips include a brief description of typical people in which he may interact. By adapting to the communication style desired by other people, Jeff will become more effective in his communications with them. He may have to practice some flexibility in varying his communication style with others who may be different from himself. This flexibility and the ability to interpret the needs of others is the mark of a superior communicator.*

When communicating with a person who is dependent, neat, conservative, perfectionist, careful and compliant:

- Prepare your "case" in advance.
- Stick to business.
- Be accurate and realistic.

Factors that will create tension or dissatisfaction:

- Being giddy, casual, informal, loud.
- Pushing too hard or being unrealistic with deadlines.
- Being disorganized or messy.

When communicating with a person who is ambitious, forceful, decisive, strong-willed, independent and goal-oriented:

- Be clear, specific, brief and to the point.
- Stick to business.
- Be prepared with support material in a well-organized "package."

Factors that will create tension or dissatisfaction:

- Talking about things that are not relevant to the issue.
- Leaving loopholes or cloudy issues.
- Appearing disorganized.

When communicating with a person who is patient, predictable, reliable, steady, relaxed and modest:

- Begin with a personal comment--break the ice.
- Present your case softly, nonthreateningly.
- Ask "how?" questions to draw their opinions.

Factors that will create tension or dissatisfaction:

- Rushing headlong into business.
- Being domineering or demanding.
- Forcing them to respond quickly to your objectives.

When communicating with a person who is magnetic, enthusiastic, friendly, demonstrative and political:

- Provide a warm and friendly environment.
- Don't deal with a lot of details (put them in writing).
- Ask "feeling" questions to draw their opinions or comments.

Factors that will create tension or dissatisfaction:

- Being curt, cold or tight-lipped.
- Controlling the conversation.
- Driving on facts and figures, alternatives, abstractions.



# PERCEPTIONS

*A person's behavior and feelings may be quickly telegraphed to others. This section provides additional information on Jeff's self-perception and how, under certain conditions, others may perceive his behavior. Understanding this section will empower Jeff to project the image that will allow him to control the situation.*

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## "See Yourself As Others See You"

### SELF-PERCEPTION

Jeff usually sees himself as being:

Enthusiastic  
Charming  
Persuasive

Outgoing  
Inspiring  
Optimistic

### OTHERS' PERCEPTION

Under moderate pressure, tension, stress or fatigue, others may see him as being:

Self-Promoting  
Overly Optimistic

Glib  
Unrealistic

And, under extreme pressure, stress or fatigue, others may see him as being:

Overly Confident  
Poor Listener

Talkative  
Self-Promoter



## DESCRIPTORS

Based on Jeff's responses, the report has marked those words that describe his personal behavior. They describe how he solves problems and meets challenges, influences people, responds to the pace of the environment and how he responds to rules and procedures set by others.

Dominance	Influencing	Steadiness	Compliance
Demanding Egocentric Driving Ambitious Pioneering Strong-Willed Forceful Determined Aggressive Competitive Decisive Venturesome Inquisitive Responsible	Effusive Inspiring <b>Magnetic</b> <b>Political</b> <b>Enthusiastic</b> <b>Demonstrative</b> <b>Persuasive</b> <b>Warm</b> <b>Convincing</b> <b>Polished</b> <b>Poised</b> <b>Optimistic</b> <b>Trusting</b> <b>Sociable</b>	Phlegmatic Relaxed Resistant to Change Nondemonstrative Passive Patient Possessive Predictable Consistent <b>Deliberate</b> <b>Steady</b> <b>Stable</b>	Evasive Worrisome Careful Dependent Cautious Conventional Exacting Neat Systematic Diplomatic Accurate Tactful Open-Minded Balanced Judgment
Conservative	Reflective Factual Calculating Skeptical Logical Undemonstrative Suspicious Matter-of-Fact Incisive Pessimistic Moody Critical	Mobile Active Restless Alert Variety-Oriented Demonstrative Impatient Pressure-Oriented Eager Flexible Impulsive Impetuous Hypertense	Firm
Calculating Cooperative Hesitant Low-Keyed Unsure Undemanding Cautious Mild Agreeable Modest Peaceful Unobtrusive			<b>Independent</b> <b>Self-Willed</b> <b>Stubborn</b> Obstinate Opinionated Unsystematic Self-Righteous Uninhibited Arbitrary Unbending Careless with Details



## NATURAL AND ADAPTED STYLE

*Jeff's natural style of dealing with problems, people, pace of events and procedures may not always fit what the environment needs. This section will provide valuable information related to stress and the pressure to adapt to the environment.*

Natural	PROBLEMS - CHALLENGES	Adapted
Jeff is somewhat conservative in his approach to solving problems. He will accept challenges by being quite calculating in his response to the problem or challenge. Jeff will be quite cooperative by nature and attempt to avoid confrontation as he wants to be seen as a person who is "easy" to work with.	Jeff seeks a cautious approach to solving problems. He wants to solve problems within the framework of a team environment. Seldom will he force his opinion as he prefers a compromise as opposed to a win-lose situation.	

Natural	PEOPLE - CONTACTS	Adapted
Jeff's natural style is to use persuasion and emotion to the extreme. He is positive and seeks to win by the virtues of his personality and verbal skills. He will convince you that what he is saying is not only right, but is exactly what is needed. He displays enthusiasm for almost any project.	Jeff sees no need to change his approach to influencing others to his way of thinking. He sees his natural style to be what the environment is calling for.	



## NATURAL AND ADAPTED STYLE

Natural	PACE - CONSISTENCY	Adapted
Jeff is deliberate and steady. He is willing to change, if the new direction is meaningful and consistent with the past. He will resist change for change's sake.		Jeff wants an environment that is variety-oriented. He feels a great sense of urgency to get things completed quickly. He is eager to accept change and work on many activities.

Natural	PROCEDURES - CONSTRAINTS	Adapted
Jeff is independent by nature and feels comfortable in situations where the constraints are few and far between. He will follow rules as long as he feels that the rules are his. He has a tendency to rebel from rules set by others and wants input into any constraints.		Jeff shows little discomfort when comparing his basic (natural) style to his response to the environment (adapted) style. The difference is not significant and Jeff sees little or no need to change his response to the environment.



## ADAPTED STYLE

*Jeff sees his present work environment requiring him to exhibit the behavior listed on this page. If the following statements DO NOT sound job related, explore the reasons why he is adapting this behavior.*

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- Using restraint when confrontation occurs.
- Being cordial and helpful when dealing with new clients or customers.
- Being conservative, not competitive, in nature.
- Preferring people involvement over task focus.
- Motivating people to take action by using persuasive skills.
- Positive, outgoing, friendly behavior.
- Being cooperative and supportive.
- Making tactful decisions.
- Obtaining results through people.
- Maintaining an ever-changing, friendly, work environment.
- Contacting people using a variety of modes.
- Participative decision making.
- Undemanding of others' time and attention.



## AREAS FOR IMPROVEMENT

*In this area is a listing of possible limitations without regard to a specific job. Review with Jeff and cross out those limitations that do not apply. Highlight 1 to 3 limitations that are hindering his performance and develop an action plan to eliminate or reduce this hindrance.*

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Jeff has a tendency to:

- Have difficulty planning and controlling time expenditure.
- Trust people indiscriminately if positively reinforced by those people.
- Be inattentive to detail unless that detail is important to him or if detail work is of a short duration.
- Overuse praise in motivating others.
- Make decisions based on surface analysis.
- Be optimistic regarding possible results of his projects or the potential of his people.
- Be too verbal in expressing criticism.
- Be so enthusiastic that he can be seen as superficial.
- Be unrealistic in appraising people--especially if the person is a "friend."



## ACTION PLAN

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The following are examples of areas in which Jeff may want to improve. Circle 1 to 3 areas and develop action plan(s) to bring about the desired results. Look over the report for possible areas that need improvement.

- |  |  |
|--|--|
| <input type="checkbox"/> Communicating (Listening) | <input type="checkbox"/> Time Management   |
| <input type="checkbox"/> Delegating                | <input type="checkbox"/> Career Goals      |
| <input type="checkbox"/> Decision Making           | <input type="checkbox"/> Personal Goals    |
| <input type="checkbox"/> Disciplining              | <input type="checkbox"/> Motivating Others |
| <input type="checkbox"/> Evaluating Performance    | <input type="checkbox"/> Developing People |
| <input type="checkbox"/> Education                 | <input type="checkbox"/> Family            |

Area: \_\_\_\_\_

- 1.
- 2.
- 3.

Area: \_\_\_\_\_

- 1.
- 2.
- 3.

Area: \_\_\_\_\_

- 1.
- 2.
- 3.

Date to Begin: \_\_\_\_\_ Date to Review: \_\_\_\_\_

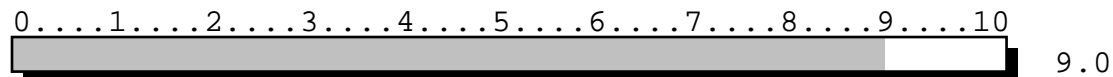




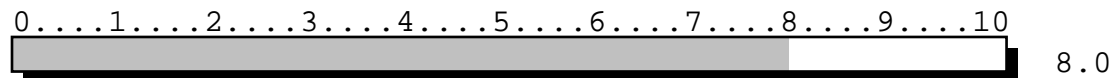
## BEHAVIORAL HIERARCHY

*The Behavioral Hierarchy graph will display a ranking of your natural behavioral style within a total of eight (8) areas commonly encountered in the workplace. It will help you understand in which of these areas you will naturally be most effective.*

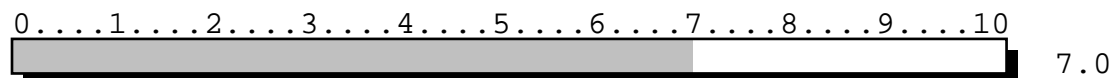
### 1. FREQUENT INTERACTION WITH OTHERS



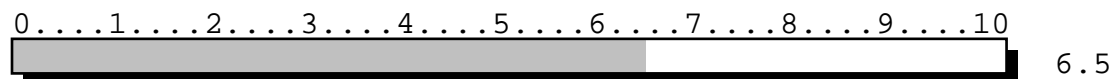
### 2. CUSTOMER ORIENTED



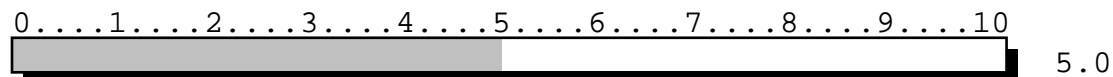
### 3. VERSATILITY



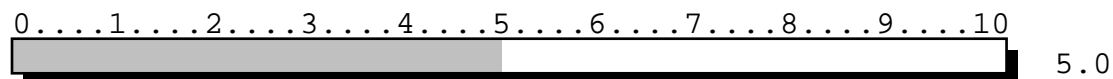
### 4. FREQUENT CHANGE



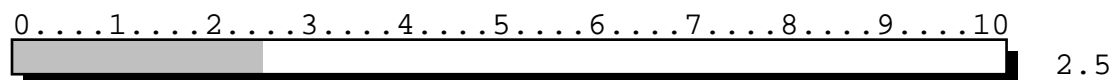
### 5. URGENCY



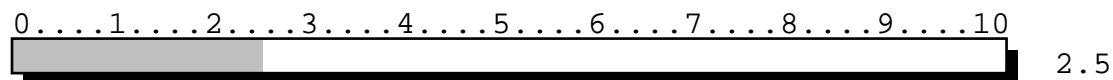
### 6. COMPETITIVENESS



### 7. ORGANIZED WORKPLACE



### 8. ANALYSIS OF DATA



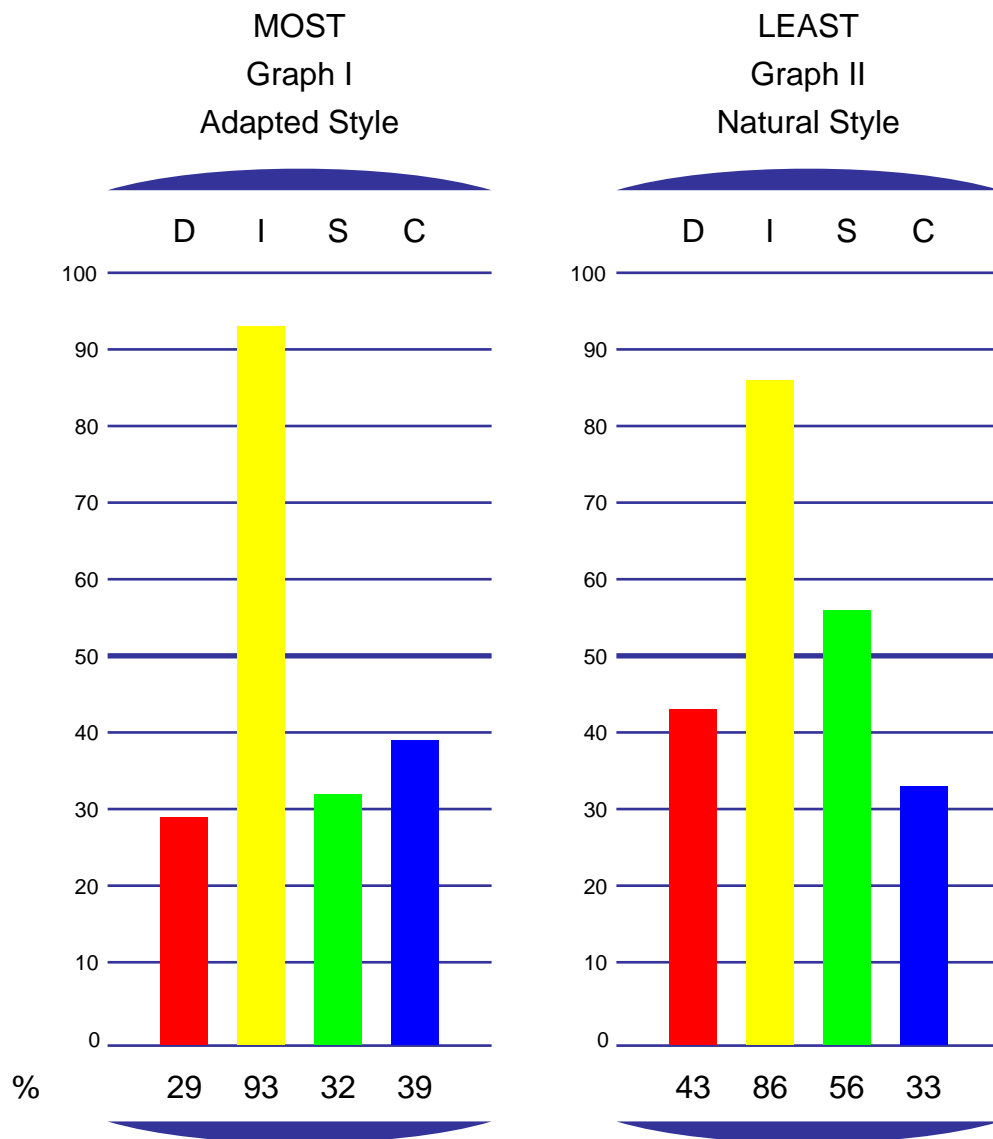


## STYLE INSIGHTS™ GRAPHS

**Jeff Doe**

ABC Corporation

11-16-2004



Norm 2003



## THE SUCCESS INSIGHTS® WHEEL

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The Success Insights® Wheel is a powerful tool popularized in Europe. In addition to the text you have received about your behavioral style, the Wheel adds a visual representation that allows you to:

- View your natural behavioral style (circle).
- View your adapted behavioral style (star).
- Note the degree you are adapting your behavior.
- If you filled out the Work Environment Analysis, view the relationship of your behavior to your job.

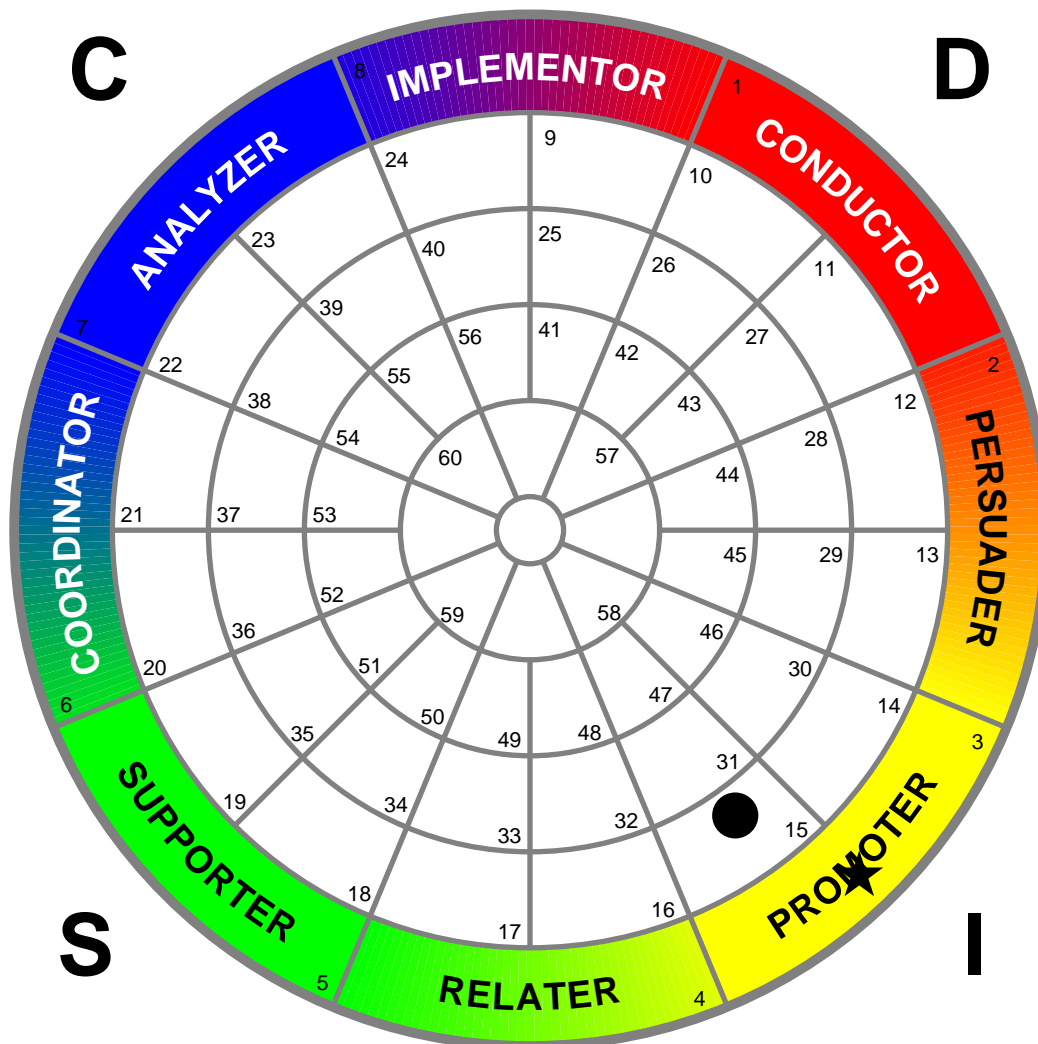
Notice on the next page that your Natural style (circle) and your Adapted style (star) are plotted on the Wheel. If they are plotted in different boxes, then you are adapting your behavior. The further the two plotting points are from each other, the more you are adapting your behavior.

If you are part of a group or team who also took the behavioral assessment, it would be advantageous to get together, using each person's Wheel, and make a master Wheel that contains each person's Natural and Adapted style. This allows you to quickly see where conflict can occur. You will also be able to identify where communication, understanding and appreciation can be increased.



# THE SUCCESS INSIGHTS® WHEEL

Jeff Doe  
ABC Corporation  
11-16-2004



Adapted: ★ (3) PROMOTER  
Natural: ● (15) RELATING PROMOTER

Norm 2003



# INTRODUCTION

## *Motivators*

Knowledge of an individual's values help to tell us WHY they do things. A review of an individual's experiences, references, education and training help to tell us WHAT they can do. Behavioral assessments help to tell us HOW a person behaves and performs in the work environment. The Workplace Motivators report measures the relative prominence of six basic interests or values (a way of valuing life): Theoretical, Utilitarian/Economic, Aesthetic, Social/Altruistic, Individualistic/Political and Traditional/Regulatory.

<b>Value</b>	<b>the Drive for</b>
<b>Theoretical</b>	<b>Knowledge</b>
<b>Utilitarian/Economic</b>	<b>Money</b>
<b>Aesthetic</b>	<b>Form and Harmony</b>
<b>Social/Altruistic</b>	<b>Helpfulness</b>
<b>Individualistic/Political</b>	<b>Power</b>
<b>Traditional/Regulatory</b>	<b>Order</b>

Values help to initiate one's behavior and are sometimes called the hidden motivators because they are not always readily observed. It is the purpose of this report to help illuminate and amplify some of those motivating factors and to build on the strengths that each person brings to the work environment.

Based on your choices, this report ranks your relative passion for each of the six values. A knowledge of an individual's values help to tell us why they do what they do. By measuring values, we uncover some of these motivators and can identify strengths that make each person unique within an organization. Values initiate or drive our behavioral style.

### **Workplace Motivators Report**

This document has been prepared based on careful statistical analysis of the response pattern on the Motivation Insights™ instrument. Norms have been developed for this instrument from thousands of professionals. This report uses the latest information available about human cognition and memory. Content is arranged in easy-to-remember categories using an interactive page layout.



# INTRODUCTION

## *Motivators*

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### **How to get the most from this report**

1. Add, delete, and write comments in this document and consider it a work-in-progress handbook or personal tool. Consult, review, revise, and update this document periodically.
2. Review the report and select items of primary importance to current projects. Determine the best steps ahead based on what the report reveals and current experiences.
3. As appropriate, share the information on the Team Building Summary with peers and managers at whatever level of disclosure feels comfortable. As communication is a two-way process, peers and managers are encouraged to share similar information from their own Team Building Summary sheets.
4. Use the information in the report to serve as a "self-management handbook" or "empowerment manual" to help clarify workplace values issues, and to assist in maintaining optimal performance.
5. Other steps and processes may emerge through team meetings.

### **This report includes**

- A section for each of the six Values dimensions in these categories: General Characteristics; Value to the Organization; Keys to Managing and Motivating; Training, Professional Development and Learning Insights; Continuous Quality Improvement.
- A Norms and Comparisons section that reveals where your values are compared to the national mean.
- A Values Graph
- A Values Wheel
- A Values Action Plan for affirming strengths and encouraging growth and development.
- A Team Building Summary to facilitate sharing selected information with others.



## UTILITARIAN/ECONOMIC

*The Utilitarian/Economic score shows a characteristic interest in money and what is useful. This means that an individual wants to have the security that money brings not only for themselves, but for their present and future family. This value includes the practical affairs of the business world - the production, marketing and consumption of goods, the use of credit, and the accumulation of tangible wealth. This type of individual is thoroughly practical and conforms well to the stereotype of the average American business person. A person with a high score is likely to have a high need to surpass others in wealth.*

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### General Characteristics

- Responds best when education and training are practical and useful, with a profit or economic objective that is clearly attached to the training.
- Knowledge for the sake of knowledge may be viewed as a waste of time, talent, energy and creativity.
- Jeff likes rewards based on the results he achieves rather than on the method used to obtain the results.
- Jeff is hard-working, competitive, and motivated by financial rewards and challenging compensation plans.
- When profit or project cost/benefits are examined, he takes the position that the ends justify the means.
- Motivated by money and bonuses as recognition for a job well done.
- Wants to surpass others in wealth or possessions.
- Fits the stereotype of the typical American businessperson, interested in economic incentives.
- Motivated by high pay and attaches importance to high earnings.

### Value to the Organization

- Driven by competition, challenges, and economic incentives.
- Makes decisions with practicality and bottom-line dollars in mind.
- Exhibits drive and motivation to achieve and win in a variety of areas.
- Is able to multi-task in a variety of areas and keep important projects moving.
- Keeps an ear to the revenue-clock, his own and the organization's.



## UTILITARIAN/ECONOMIC

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### Keys to Managing and Motivating

- Realize that for those who score in this high economic range there may be low company loyalty. Be certain to reward performance, and encourage participation as an important member of the team.
- Provide recognition and rewards (e.g. bonuses) as soon as possible, not just at the end of the quarter or year.
- Assure that economic rewards are fair, clearly communicated, and provide a high-end return for those willing to work for it.
- Link training and meeting events to potential gains in business share or future income.
- Provide coaching to help Jeff appreciate that not everybody is as motivated by wealth, return-on-investment and gain as he is.

### Training, Professional Development and Learning Insights

- Link learning outcomes to the ability to become more effective in increasing earnings for both himself and the organization.
- Provide some rewards and incentives for participation in additional training and professional development.
- If possible, build in some group competition as a part of the training activities.

### Continuous Quality Improvements

- Within this high economic drive, there may be a significant motivating factor in achieving goals. It may also become an insatiable need, especially in sales people and others sharing this very high economic drive.
- Needs to hide the dollar signs in his eyes in order to establish the most appropriate rapport with others.
- Needs to have an increased sensitivity to the needs of others and less demonstration of potential selfishness.





## SOCIAL/ALTRUISTIC

*Those who score very high in this value have an inherent love of people. The Social/Altruistic person prizes other people and is, therefore, kind, sympathetic and unselfish. They are likely to find the Theoretical, Utilitarian and Aesthetic values cold and inhuman. Compared to the Individualistic value, the Social/Altruistic person regards helping others as the only suitable form for human relationships. Research into this value indicates that in its purest form, the Social/Altruistic interest is selfless.*

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### General Characteristics

- Demonstrates a high need to help others achieve and win.
- Exhibits a strong drive to help others grow professionally.
- Possesses a high sincerity factor and helping attitude, as demonstrated in the things he does.
- Exhibits a high sincerity factor in his tone of voice in communicating with others.
- Freely gives of his time, talent, and energy to others, even without being asked.
- Agrees that "it is better to give than to receive," even in an organizational setting.
- Possesses a high service ethic toward helping others.
- Likes to connect people with others who have things in common.
- Cares about the feelings of others on the team.

### Value to the Organization

- Shows a high degree of interpersonal empathy when dealing with team or individual concerns.
- Shows a high degree of willingness to give time to help, teach, and coach others.
- Provides a calming influence during stressful situations.
- Has a desire to go beyond required job description to help make things easier for others.
- Shows a willingness to give time, talent, and energy to help the organization or the team.

### Keys to Managing and Motivating

- Provide an environment in which there is opportunity to help others achieve and grow professionally.
- Remember also that Jeff may be taken advantage of by others with fewer scruples.
- Jeff gets a high degree of motivation from helping others achieve, grow, and solve problems, both as internal team members and as external customers and clients. Provide an outlet for this strength.
- Explore the possibilities of having him bring new participants up-to-speed on a project or team effort.
- Remember that he brings a high sincerity factor to the things that he does. Remember also that he appreciates high sincerity from others in return.



## SOCIAL/ALTRUISTIC

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### **Training, Professional Development and Learning Insights**

- Learning and professional development should be linked to his potential of being more effective in helping others on the team.
- Courses and training will help amplify his need to teach, coach or help others as either internal or external stakeholders.
- Learning successes can be linked to increasing his personal knowledge base to share with others.

### **Continuous Quality Improvements**

- Tends to give away too much time, talent, and energy.
- May try to help too much and ends up getting in the way of some who may not want the help.
- May get taken advantage of by others.



## THEORETICAL

*The primary drivers with this value are the discovery of KNOWLEDGE and appetite for LEARNING. In pursuit of this value, an individual takes a "cognitive" attitude. Such an individual is nonjudgmental regarding the beauty or utility of objects and seeks only to observe and to reason. Since the interests of the theoretical person are empirical, critical and rational, the person appears to be an intellectual. The chief aim in life is to order and systematize knowledge: knowledge for the sake of knowledge.*

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### General Characteristics

- His Theoretical need is not the most important or primary driving values factor.
- Jeff may provide a balance between the very high theoretical approaches, and the very low approaches, and be able to communicate with each side.
- Is able to understand the needs of big picture issues, and appreciate the needs of trivial or minute issues without being an extremist.
- Brings a sense of balance and stability to a variety of technical issues impacting the team.
- Jeff typically won't get bogged down in minutia, nor will he ignore the details when decision-making.

### Value to the Organization

- Jeff demonstrates awareness of the necessary technical features, and responds as needed on-the-job.
- Brings flexibility to the team; that is, being detail-oriented when necessary, and being practically-oriented other times.
- Is a stabilizing force on the team.
- Is able to appreciate the needs of both the higher and lower Theoreticals.
- Shows curiosity about technical details without getting bogged down.

### Keys to Managing and Motivating

- Remember that he has the ability to be a balancing and stabilizing agent on high knowledge-driven tasks/assignments/projects.
- Jeff brings a knowledge-drive typical of many business professionals.
- Include the perspective he brings in order to gain a middle-ground understanding.
- Check for other values drives that may be higher or lower than this one in order to gain a more complete picture of specific keys to managing and motivating.



## THEORETICAL

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### **Training, Professional Development & Learning Insights**

- Is rather flexible and accepting of most training programs offered in the organization.
- Understands the needs of the high Theoreticals who want more information, and the lower Theoreticals who want only the necessary information.
- Please check other areas of higher or lower values drive for additional insight into professional development needs.

### **Continuous Quality Improvements**

- May need to be a bit more demonstrative on some complex theoretical issues.
- May be asked to take a firmer stand or position on team initiatives.
- May need to examine other values drives to determine the importance of this Theoretical drive factor.



## INDIVIDUALISTIC/POLITICAL

*The primary interest for this value is POWER. Research studies indicate that leaders in most fields have a high power value. Since competition and struggle play a large part in all areas of life, many philosophers have seen power as the most universal and most fundamental of motives. There are, however, certain personalities in whom the desire for direct expression of this motive is uppermost; who wish, above all, for personal power, influence and renown.*

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### General Characteristics

- Shows moderate social flexibility. Jeff would be considered as one who is socially appropriate and supportive of others on the team.
- Generally not considered an extremist on ideas, methods, or issues in the workplace.
- Has the ability to take a stand on an issue when necessary, to yield position when necessary, and to do both with equal sincerity.
- Has the ability to take or leave the limelight and attention given for special contributions.
- Shows the ability to take a leadership role when asked, and also to be supportive team member when asked.
- Jeff would not be considered controversial in his workplace ideas or transactions.

### Value to the Organization

- Seen as a stabilizing force in organizational operations and transactions.
- Considered flexible and versatile without being an extremist.
- Able to see both sides of the position from those with higher and lower Individualistic scores.
- Able to mediate between the needs of the higher and lower Individualistic members of the team.
- Able to take a stand with emphasis, or to be a more quiet member supporting a position.

### Keys to Managing and Motivating

- Jeff is socially flexible. He can assume an appropriate leadership role for a team; or, be a supportive team member as the situation requires.
- Remember that Jeff shows the ability to get along with a wide variety of others without alienating those with opinions in extreme positions on the spectrum.
- Jeff is able to be a balancing or stabilizing agent in a variety of team-related issues without being an extremist on either side.
- Jeff brings an Individualistic drive typical of many professionals.
- Seek his input to gain a center-lane perspective on an organizational issue related to this Values scale.



## INDIVIDUALISTIC/POLITICAL

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### **Training, Professional Development and Learning Insights**

- Tends to enjoy both team-oriented and individual/independent learning activities.
- Will be a supportive member of the training experience from the viewpoint of this Values dimension.
- Please check other higher and lower Values areas to obtain additional insight into learning preferences.

### **Continuous Quality Improvements**

- Without necessarily picking sides, he may need to take a stand on some issues related to individual agendas.
- To gain additional insight, examine other Values drives to determine the importance of this Individualistic drive factor.
- Allow space for those with higher Individualistic drives to express themselves in appropriate ways.



## AESTHETIC

*A higher Aesthetic score indicates a relative interest in "form and harmony." Each experience is judged from the standpoint of grace, symmetry or fitness. Life may be regarded as a procession of events, and each is enjoyed for its own sake. A high score here does not necessarily mean that the incumbent has talents in creative artistry. It indicates a primary interest in the artistic episodes of life.*

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### General Characteristics

- Other values take a higher motivational priority than this Aesthetic scale.
- Able to allow others on the team a greater voice and expression of their creativity. May not need a high-visibility profile.
- Keeps an ear to the revenue-clock of an organization, and doesn't want to waste time or money on ambience issues if it doesn't affect productivity.
- Intellectually, Jeff can see the need for beauty and artistic forms, but may not seek them for his own environment.
- Jeff is a very practical person who can take or leave the Aesthetics or ambience of the work environment.
- The utility of something is more important than its beauty, form and harmony.
- Jeff prefers to take a practical approach to workplace events.

### Value to the Organization

- Unpleasant surroundings will not adversely affect his productivity and creativity.
- Sees a wider spectrum of the picture, not just from the artistic viewpoint.
- Not easily swayed in terms of emotional issues.
- Good business-sense and a good eye for that which is practical.

### Keys to Managing and Motivating

- Be careful not to overload with assignments that require significant individual creativity and self-expression.
- Appeal to the practical side that he shows in projects and leadership.
- Notice other higher plotting points on the Values graph and structure an environment that amplifies those peaks.
- Check areas for higher Values drives to determine a blend of other management or motivational insights.
- Structure job enrichment strategies into the reward system, especially those that will appeal to higher Values scores.



## AESTHETIC

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### **Training, Professional Development and Learning Insights**

- Make training and development activities as practical as possible.
- Brings a bottom-line orientation to training venues and is flexible about the environment of the training session.
- Link learning and professional development to other items of greater self-interest.

### **Continuous Quality Improvements**

- Seen as overly business-like by some, but this comes from the practical side of his workplace values.
- Needs to be more sensitive to others need for an aesthetically pleasant workplace.
- Needs to be aware of others who may have a stronger Aesthetic drive, and respect the differences.





## TRADITIONAL/REGULATORY

*The highest interest for this value may be called "unity," "order," or "tradition." Individuals with high scores in this value seek a system for living. This system can be found in such things as religion, conservatism or any authority that has defined rules, regulations and principles for living.*

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### General Characteristics

- An informal approach to rules and regulations.
- Has the desire for quick results. This may include expediting certain procedures.
- Is perceived by some as a rule-bender.
- May believe in supremacy of the individual over the group.
- Adjusts quickly to change and is flexible.
- Shows good judgment in his ability to self-manage on tasks and projects.
- May occasionally break the rules with the rationale: the end justifies the means.

### Value to the Organization

- Is able to make quick decisions without getting emotionally involved.
- Is always looking for efficient and logical solutions.
- Is a creative problem-solver.
- Tends to be a quick-study on new projects and procedures.
- Looks for creative solutions to problems.

### Keys to Managing and Motivating

- Provide opportunities for professional development and growth.
- Requires specific instructions so that he can do the routine aspects of job correctly the first time.
- Enjoys variety in the job culture.
- Prefers being allowed to make his own decisions about how the work will be done within his own authority or empowerment boundaries.
- Maximize use of his adaptability to new projects and ideas.

### Training, Professional Development and Learning Insights

- May prefer more dynamic, spontaneous, or creative learning activities.
- Tends to be more flexible and adaptable to a variety of learning activities.
- May want to create his own learning path or activities in a creative manner.



## TRADITIONAL/REGULATORY

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### Continuous Quality Improvements

- Don't ignore the important details.
- Needs to increase patience when interacting with more rules-oriented individuals.
- Maintain awareness of facial expression and comments when in disagreement with those showing a different point of view.



## MOTIVATORS - NORMS & COMPARISONS

For years you have heard statements like, "Different strokes for different folks," "to each his own," and "people do things for their own reasons, not yours." When you are surrounded by people who share similar values, you will fit in with the group and be energized. However, when surrounded by people whose values are significantly different from yours, you may be perceived as out of the mainstream. If the differences are understood, each brings strengths to the equation. If not understood, these differences can induce stress or conflict. When confronted with this type of situation you can:

- Change the situation.
- Change your perception of the situation.
- Leave the situation.
- Cope with the situation.

This section reveals areas where your values may be outside the mainstream and could lead to conflict. The further away you are from the mainstream on the high side, the more people will notice your passion about that value. The further away from the mainstream on the low side, the more people will view you as indifferent and possibly negative about that value. The shaded area for each value represents 68 percent of the population or scores that fall within one standard deviation above or below the national mean.

NORMS & COMPARISONS TABLE - Norm 2003		
Jeff Doe		
THEORETICAL		Mainstream
UTILITARIAN		Mainstream
AESTHETIC		Mainstream
SOCIAL		Mainstream
INDIVIDUALISTIC		Mainstream
TRADITIONAL		Indifferent

- 68 percent of the population      | - national mean      \* - your score

Mainstream - one standard deviation of the national mean

Passionate - two standard deviations above the national mean

Indifferent - two standard deviations below the national mean

Extreme - three standard deviations from the national mean



## MOTIVATORS - NORMS & COMPARISONS

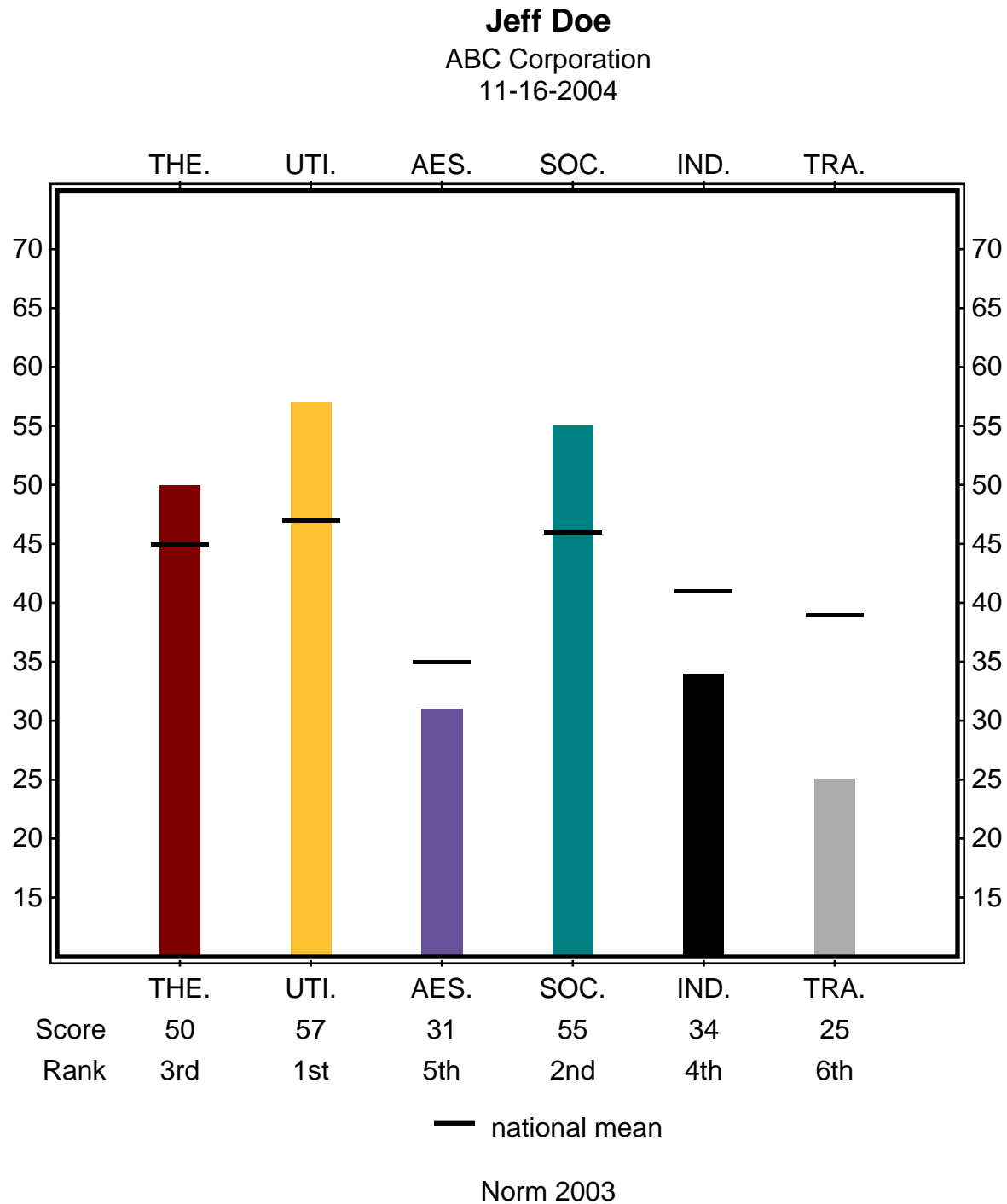
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Areas where others' strong feelings may frustrate you as you do not share their same passion:

- Others who try to impose their way of living on you will frustrate you. Your ability to try new things frustrates them and they feel compelled to change you to their system.



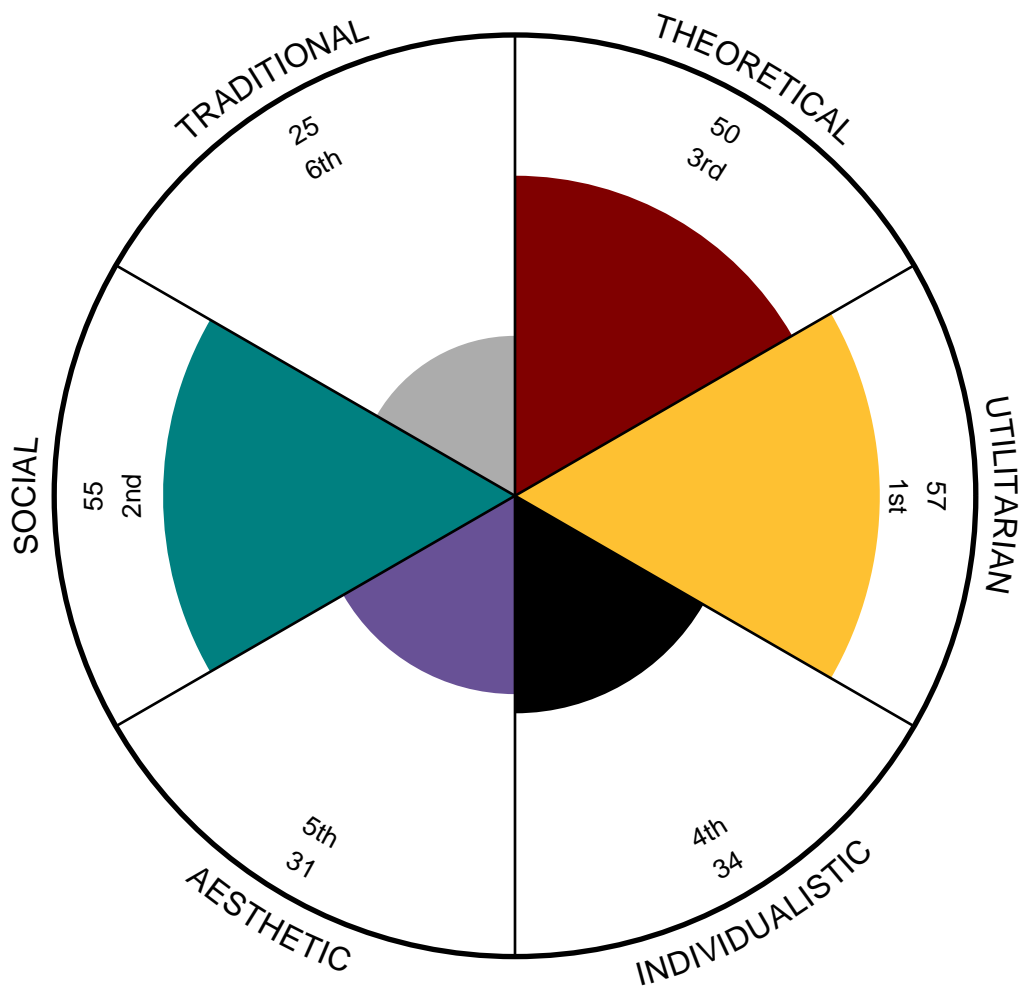
## MOTIVATION INSIGHTS™ GRAPH





## ATTITUDES WHEEL™

**Jeff Doe**  
ABC Corporation  
11-16-2004





## VALUES ACTION PLAN

*This Action Plan is your tool to contribute to the process of self-development and continuous improvement. As you have reviewed information in this document, please respond to the items below as they relate to your specific professional environment.*

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### **Area 1: The greater or global mission of the team or organization.**

In the space below indicate briefly one or two areas of strength that you bring to the greater mission of the organization at large.

### **Area 2: An immediate or shorter-term mission, task or purpose of a smaller group of people with whom you work on day-to-day operations.**

In the space below, indicate briefly one or two areas of strength (different from those above), that you bring to the shorter-term tasks or day-to-day operations.



## QUALITY IMPROVEMENT ACTION PLAN

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In the area below, respond briefly as indicated. Base your answers on some of the information and results presented in this document.

### **Action Point 1: Things I will keep on doing.**

Indicate three things that you are doing very well already, and that you plan to keep on doing.

- 1.
- 2.
- 3.

### **Action Point 2: Things I will modify or change slightly.**

Indicate 2 things that you will modify, adjust, or change slightly in order to increase personal effectiveness.

- 1.
- 2.

### **Action Point 3: Things I will stop doing, or try to eliminate.**

Indicate one thing that you will try to stop doing in order to increase personal effectiveness.

- 1.

Today's Date: \_\_\_\_\_

Date to review with mentor or peer: \_\_\_\_\_





## TEAM BUILDING SUMMARY OF WORKPLACE VALUES

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Pick the most important item in each category from the Workplace Motivators report in the topic areas indicated. Leave a line blank if no primary item emerges to you. This summary sheet is to be used as a primary point of dialogue between you, your peers, and your manager, provided that all have copies of their own information. This communication should be a two-way process.

*(Remember, these items are related to one's intrinsic drive factors, their 'hidden motivators' not readily observable. These items are of critical importance to one's long range success. This list illuminates why we do what we do.)*

### General Characteristics

1. Theoretical \_\_\_\_\_
2. Utilitarian/Economic \_\_\_\_\_
3. Aesthetic \_\_\_\_\_
4. Social/Altruistic \_\_\_\_\_
5. Individualistic/Political \_\_\_\_\_
6. Traditional/Regulatory \_\_\_\_\_

### Value to the Organization

1. Theoretical \_\_\_\_\_
2. Utilitarian/Economic \_\_\_\_\_
3. Aesthetic \_\_\_\_\_
4. Social/Altruistic \_\_\_\_\_
5. Individualistic/Political \_\_\_\_\_
6. Traditional/Regulatory \_\_\_\_\_



## TEAM BUILDING SUMMARY OF WORKPLACE VALUES

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### Keys to Managing and Motivating:

1. Theoretical \_\_\_\_\_
2. Utilitarian/Economic \_\_\_\_\_
3. Aesthetic \_\_\_\_\_
4. Social/Altruistic \_\_\_\_\_
5. Individualistic/Political \_\_\_\_\_
6. Traditional/Regulatory \_\_\_\_\_

### Training, Professional Development and Learning Insights:

1. Theoretical \_\_\_\_\_
2. Utilitarian/Economic \_\_\_\_\_
3. Aesthetic \_\_\_\_\_
4. Social/Altruistic \_\_\_\_\_
5. Individualistic/Political \_\_\_\_\_
6. Traditional/Regulatory \_\_\_\_\_



## TEAM BUILDING SUMMARY OF WORKPLACE VALUES

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### Continuous Quality Improvement:

1. Theoretical \_\_\_\_\_
2. Utilitarian/Economic \_\_\_\_\_
3. Aesthetic \_\_\_\_\_
4. Social/Altruistic \_\_\_\_\_
5. Individualistic/Political \_\_\_\_\_
6. Traditional/Regulatory \_\_\_\_\_

### Continuous Quality Improvement: (choose two items from any values areas)

1. \_\_\_\_\_
2. \_\_\_\_\_