



GUIDE

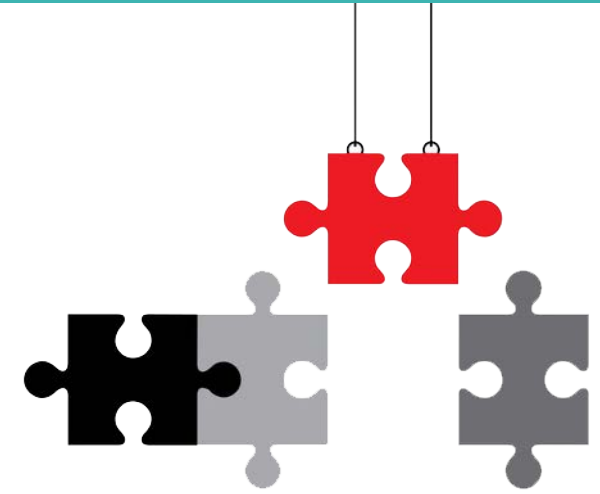
Leader Assessment for Selection and Development



**CONTEMPORARY
LEADERSHIP
ADVISORS**

Assessment is today's means of
developing tomorrow's leaders





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Assessment Overview

Our assessments provide rich, substantial insights into an individual's distinctive qualities, unique strengths and blind spots. Clients typically use our Leadership Assessments for hiring and developing key talent.

Our assessments answer these questions and more...

Is this leader capable of performing the role?

How do you get the best from this leader?

What's this leader's future potential?

How would the leader work with key stakeholders?

How does this leader facilitate potential in others?

How open to change is this leader?

How likely is this leader to be a cultural fit?

What are this leaders' greatest strengths?

What are this leaders' greatest development needs?

What might derail this leader and how do we support them?



~2X

Our Leader Assessments are almost twice as predictive of success in role than traditional approaches, dramatically improving hiring accuracy and reducing the cost of turnover.

Leadership Assessment Model

Our Leadership Assessments are informed by our Leadership Assessment Model, which defines the elements that drive leadership potential



What We're Known For

PARTNERSHIP

We listen closely to ensure we fully understand your business context and strategy and align accordingly

IMPACT

Our assessments informs successful hiring decisions and amplify leaders' influence and capability

RELEVANCE

We surfaces psychological insights that address the "so what?" needed to improve performance and achieve objectives in the specific role

OBJECTIVITY

Our approach provides an entirely independent picture of leaders' current performance, future potential, and role fit

RIGOR

Our assessors are PhDs in psychology with 20+ years of business experience who synthesize multiple data points

DEVELOPMENT

We uncover strengths and development needs and pinpoints strategies the organization can use to grow and support the leader

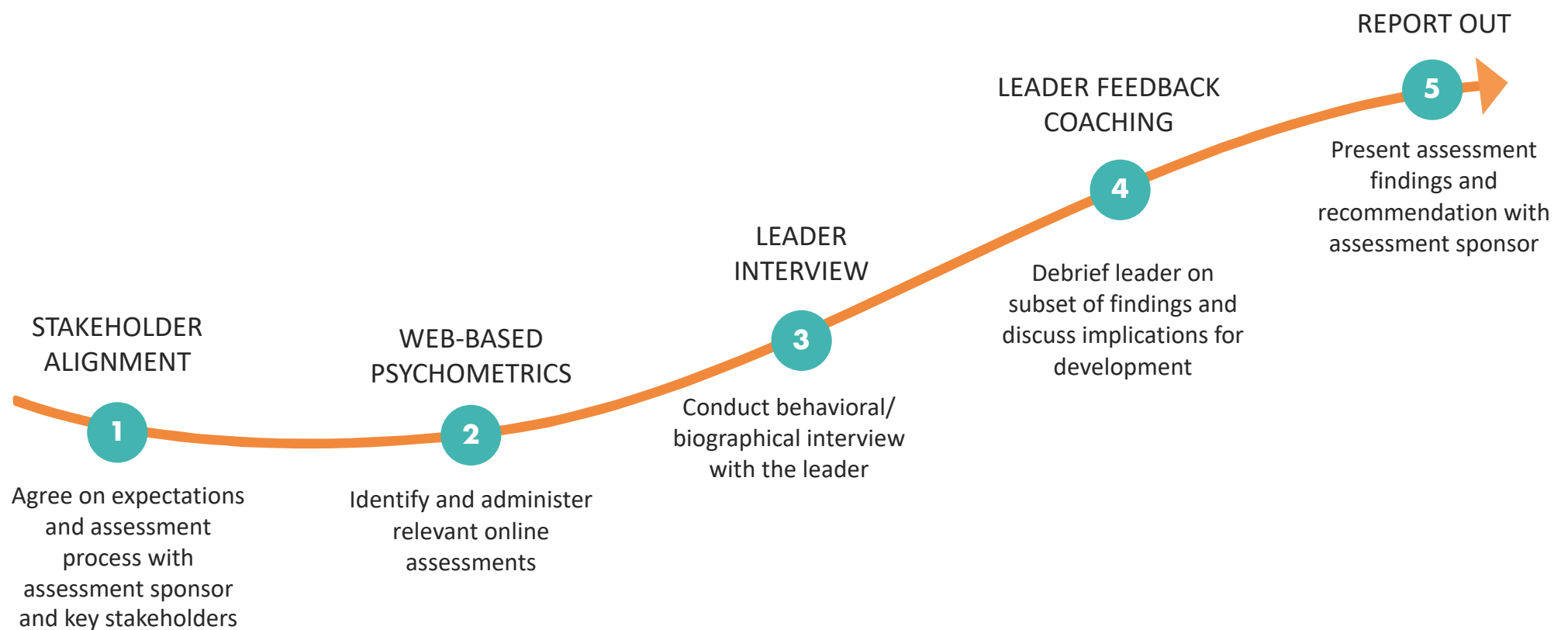
SUPPORT

Our assessments are "done with" the leader being assessed versus "done to" them. Leaders complete the process feeling understood and engaged

CONTEMPORARY

We apply the latest research on the future of leadership and what's required in today's faster-paced, more complex business environments

Leadership Assessment Process



1. Stakeholder Alignment

STAKEHOLDER ALIGNMENT

1

2

Sample Role Context
SVP, Service Delivery

Sample Organizational Context

Sample Assessment Plan
CHRO

Sample Stakeholder Alignment

Sample Organizational Context Table:

	A lot more	A little more	In the middle	A little more	A lot more
Top-down					Participative
Interdependent					Independent
					Flexible
					Commercially-Oriented
					Customer-focused
					Long-term Oriented

5

PURPOSE

Agree on expectations and assessment process with assessment sponsor and key stakeholders

ACTIONS

- Agree on messaging and communicate assessment approach and goals to relevant stakeholders
- Interview Leader's manager, HR, and other key stakeholders identified in partnership with client to define role expectations and organizational context

OUTCOMES

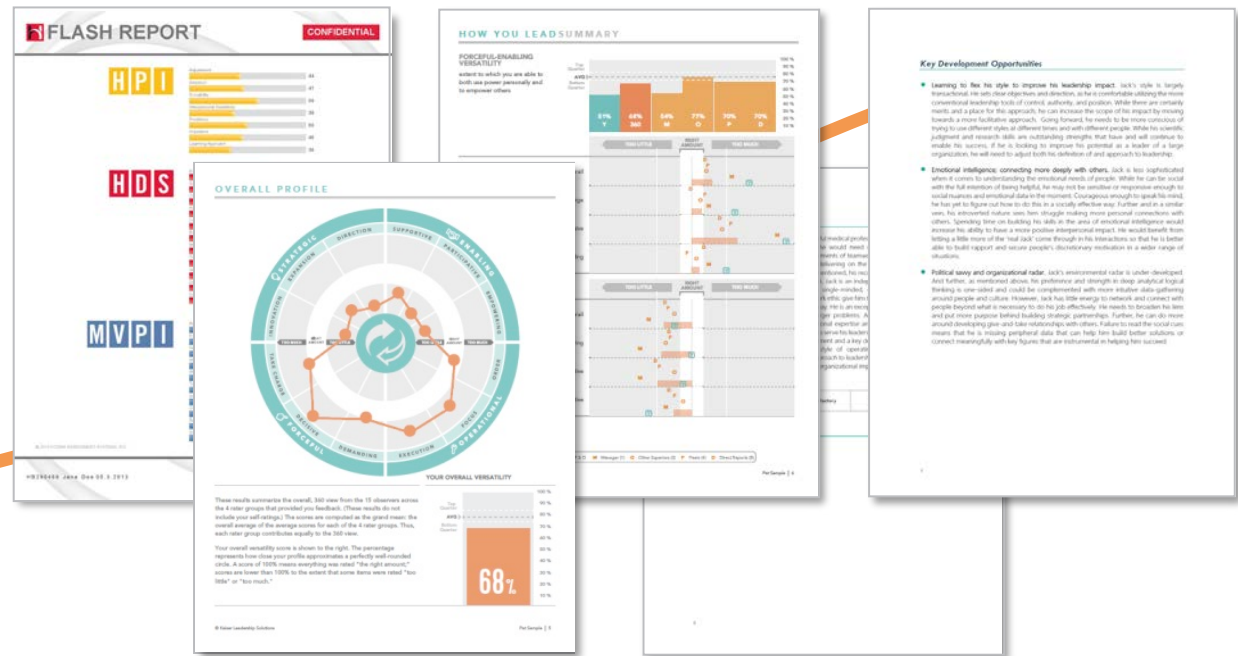
- Detailed understanding of the leaders' role and organizational context
- Stakeholder alignment around roles, process, timeline and deliverables

2. Web-based Psychometrics

WEB-BASED PSYCHOMETRICS

1

2



PURPOSE

Identify and administer relevant online assessments

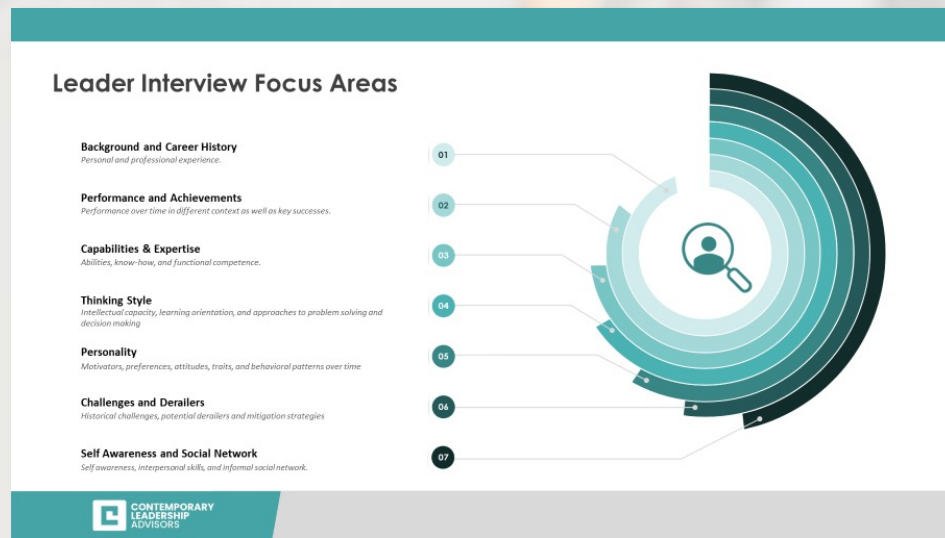
ACTIONS

- Pinpoint relevant psychometric instruments for the given role and organization
- Administer valid and reliable psychometrics (e.g., Hogan Personality Inventory, LVI 360-degree Assessment, Watson-Glaser)
- Review and synthesize results

OUTCOMES

- Improved understanding of the leaders' motivators, work behaviors, communication and problem-solving style, emotional intelligence, learning orientation, reasoning, and potential

3. Leader Interview



**LEADER
INTERVIEW**

3

4

5

PURPOSE

Conduct behavioral/ biographical interview with the leader

ACTIONS

- 4-hour interview with leader to explore their psychology and experience
- Identification of core strengths and development themes in relation to the role expectations and client context

OUTCOMES

- Deep understanding ...
- Leader feels validated and heard

4. Leader Feedback Coaching



PURPOSE

Debrief leader on subset of findings and discuss implications for development

ACTIONS

- One to two hour 1:1 coaching conversation with the leader to review findings and implications, co-create a development plan to address 2-3 development needs, and define success measures

OUTCOMES

- Increased Leader insight into strengths and development needs
- Completed Leader Development Plan

5. Report Out

REPORT OUT

5

Leadership Development Profile

Prepared for
Janice Smith
Current Role
Chief Revenue Officer

Prepared by
Tony Sosa, Ph.D.
April 2022

Executive Profile

Cognitive Agility Janice processes things through a broad lens, taking in new information quickly and processing it in real time. Though she is commercially focused, her bright, versatile thinking is supported by her verbal and conceptualization skills much more so than numerical abilities. She dives into the data when she needs to but prefers to keep her focus on the big picture and moving things forward to realize it. She likes to allow situations to emerge so long as rigorous analysis is not much fun for her. Janice's strong pragmatism and tactical focus and her solutions. She is typically aware of possibilities, she is quite able to adjust or re-adjust should relevant new data come in. She is implementing and delivering results.

Key Development Opportunities

Watch out for excessive boldness. Janice will be even more effective as a leader if she can remember that she has things to learn from all of her team members or colleagues, even those who move slower, are not as intellectually sharp or present as someone less effective. Where others could perceive her as making snap judgments on people or wielding too big a personality, she could instead influence them to follow her leadership by managing her decisiveness and assertiveness with more care, specifically when it comes to her judgment of people. Getting better at this would allow her to expand and increase her ability to tap into a more diverse range of thinking styles. Learning how to become mindful would be a useful exercise for Janice.

Becoming more reflective and solicit more feedback in the moment. Her action-orientation can seem to get her frustrated when she isn't seeing quick returns for her efforts. She could exercise more patience in her approach and allow herself more reflection time for robust data analysis and importantly to improve her personal learning. To the latter, she could also engage more in deep introspection in general and solicit more feedback from others "in the moment." Intentionally learning to slow down will accelerate her growth and give her a better chance at realizing her full potential as a leader. Finding trusted advisors to give her feedback "real time" would be helpful for her in this regard.

Staying balanced within her efforts at stakeholder management. While savvy about influencing key partners and senior leaders, her pace and the workload she often takes on can limit her focus to her immediate partners. Those who operate more remote, literally and figuratively, will not experience her presence firsthand. In her fast pace, she can move forward before having a deeper sense of buy-in from stakeholders. She should think about putting mechanisms in place to get out in the field more, expand her external relationship building and the breadth of the networks with which she shares information. Without this, she risks missing opportunities and/or providing the visible leadership presence required to drive large-scale organizational initiatives. While improvement here would help her become an even more successful enterprise leader.

Foundational Traits for Future Leaders

	Development Needed	1	2	3	4	5	6	7	8	9	Clear Strength
Cognitive Agility											
Fortitude											
Interpersonal Impact											

LEADERSHIP POTENTIAL

	Potentially Over Capacity	Well Aligned with Current Responsibilities	Could Expand Responsibilities with Current Band	Capacity to Succeed at the Next Level in the Future	Ready to Succeed in the Next Band Level
LEADERSHIP POTENTIAL					

PURPOSE

Present assessment findings and recommendations to assessment sponsor

ACTIONS

- 1-hour report of Leadership Development Profile or Leadership Selection Assessment depending on project scope

OUTCOMES

- Improved sponsor understanding of Leader insight into strengths and development needs
- Leadership Development Profile or Leadership Selection Assessment with selection recommendation depending on project scope

Types of Assessment Reports (1/2)

Leadership Development Profile

i Present assessment findings and recommendations to assessment sponsor

ii Executive Profile

- Intellectual functioning both in terms of overall capacity and thinking style
- Motivational & emotional make-up
- Interpersonal style
- Awareness into themselves and other people
- Management style
- Leadership capabilities relative to current role and potential future roles



iii Summary of Strength

iv Development Needs

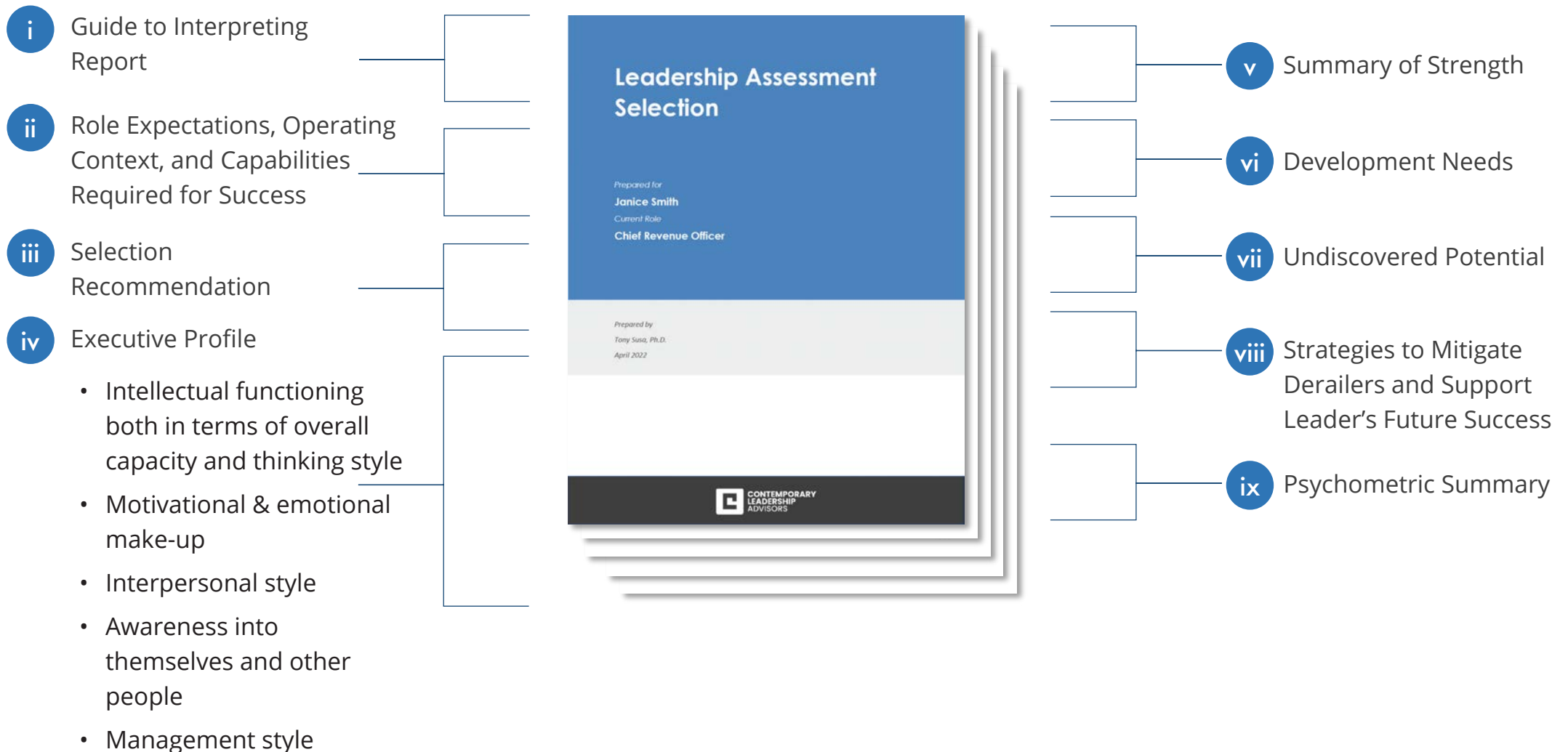
v Undiscovered Potential

vi Strategies to Mitigate Derailers and Support Leader's Future Success

vii Psychometric Summary

Types of Assessment Reports (2/2)

Leader Selection Assessment



What Makes Us Different

1

We uncover greater depth of insight.

2

The experience creates evangelists for your organization.

3

We prepare leaders to meet your organization's greatest challenges

Sample Leadership Assessment Outcomes



I've been through a lot of assessments over my career but yours was by far the best

Fortune 500 Life Science Company



96% of leaders report the assessment raised their self awareness.

Cross-Industry



The assessment and follow-up session have been very beneficial. I connected dots and I came away with new insights about how I lead.

Fortune 500 Technology Company

















90% of leaders report they have improved leadership impact as a result of the assessment experience.

Cross-Industry

Sample Clients

We work with leading companies and private equity firms.

	INVESTCORP		verizon [✓]
	 CISCO		Goldman Sachs
Morgan Stanley	HELLMAN & FRIEDMAN		
	Apax	ESTÉE LAUDER	
	Ortho Clinical Diagnostics	REGENERON	
		Google	

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