



John Leader

Leadership Values Assessment

Prepared by
Barrett Values Centre

SECTION 1: STRENGTHS

Your Assessors' View of Your Strengths

The following, in no special order, represents concurrence on what your assessors wrote in as your strong points:

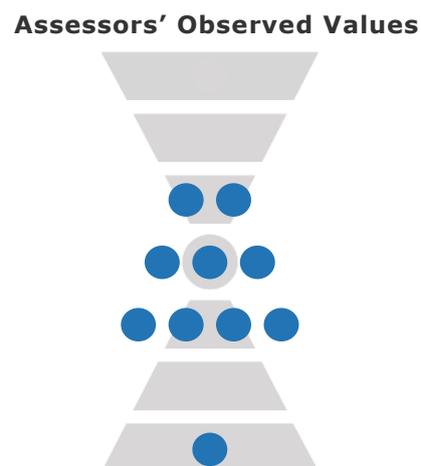
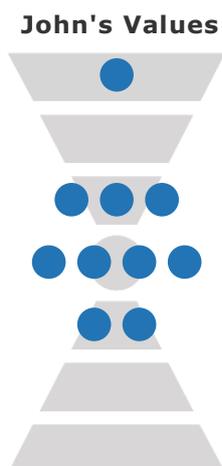
- Continuous learning
- Integrity
- Drive
- Passion
- Commitment
- Honesty
- Warmth
- Communication skills
- High standards
- Innovation
- Strategic thinking
- Speed
- Results focus
- Courage

Your Stated Strengths

- High energy/capacity
- Ability to quickly synthesize complex problems and simplify them to the essential
- Social intelligence

SECTION 2: VALUES ALIGNMENT

- 7 Visionary Leader
- 6 Mentor/Partner Leader
- 5 Authentic Leader
- 4 Facilitator/Innovator
- 3 Performance Manager
- 2 Relationship Manager
- 1 Crisis Manager



IROS (P)=8-1-1-0 | IROS (L)=0-0-0-0 IROS (P)=10-0-0-0 | IROS (L)=0-0-0-0

continuous improvement	4(O)	achievement	11	3(I)
courage	4(I)	drive and determination	9	4(I)
decisiveness	3(I)	high standards	8	3(I)
drive and determination	4(I)	strategic thinker	7	4(I)
enthusiasm	5(I)	decisiveness	6	3(I)
high standards	3(I)	self-discipline	6	1(I)
innovative	4(I)	ambitious	5	3(I)
inspiring	5(R)	commitment	5	5(I)
positive attitude	5(I)	innovative	5	4(I)
wisdom	7(I)	integrity	5	5(I)

Matches 4

Key Values Themes Observed by Assessors

- You are highly focused and motivated and committed to acting with principle.
- You demonstrate dedication and resolve in your endeavors and strive for quality outcomes.
- You plan ahead tactically, encouraging new ideas and way of working.

Your assessors chose four of your values.

decisiveness
drive and determination
high standards
innovative

Additionally, they selected six values / behaviors that you demonstrate, perhaps without awareness of their significance:

achievement
ambitious
commitment

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integrity
self-discipline
strategic thinker

Leadership Entropy

Leadership entropy is calculated by the percentage of votes from your assessors for potentially limiting values.

Level 1	Level 2	Level 3	
authoritarian (1) controlling (1) short-term focus (1)	internally competitive (2) conflict avoider (1)	demanding (2) long hours (1) power (1)	
2% of total votes	2% of total votes	3% of total votes	Total: 7%

Your degree of leadership entropy is relatively low (7%) and your leadership style largely supports your ability to reach your objectives.

Leadership Style

Your selected values show concentration at:

Level 4 - Facilitator/Influencer

Level 4 leaders empower their staff and encourage accountability. They focus on team building and innovation. They enjoy a challenge.

Your assessors have a different perspective and see most focus at:

Level 3 – Performance Manager

Level 3 leaders are managers of performance. They build systems and processes to create order and efficiency. They embrace excellence and strive to be the best at what they do.

When values are missing in a level, this could mean that 1) the issues for that level are not in your area of expertise or are already handled; 2) this may be a blind spot or an area in need of attention; or 3) this may point to the next step in your leadership evolution. What is the case behind your empty level(s)?

Types of Values

*IROS Index: Values can be classified as **I**ndividual, **R**elationship, **O**rganizational, or **S**ocietal type values and as either *Positive (P)* or *Potentially Limiting (L)*.*

Your Selected Values	Assessors' Observed Values
IROS = 8-1-1-0	IROS = 10-0-0-0

Both you and your assessors recognize that your focus is placed largely on your personal contributions and accountabilities.

To what degree do the types of Observed Values align with your own perception?

Look at the balance of values types. Is there an area you wish to strengthen or develop?

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Balance Index

This shows the distribution of all the values that were chosen by survey participants by level.

Leadership (L):

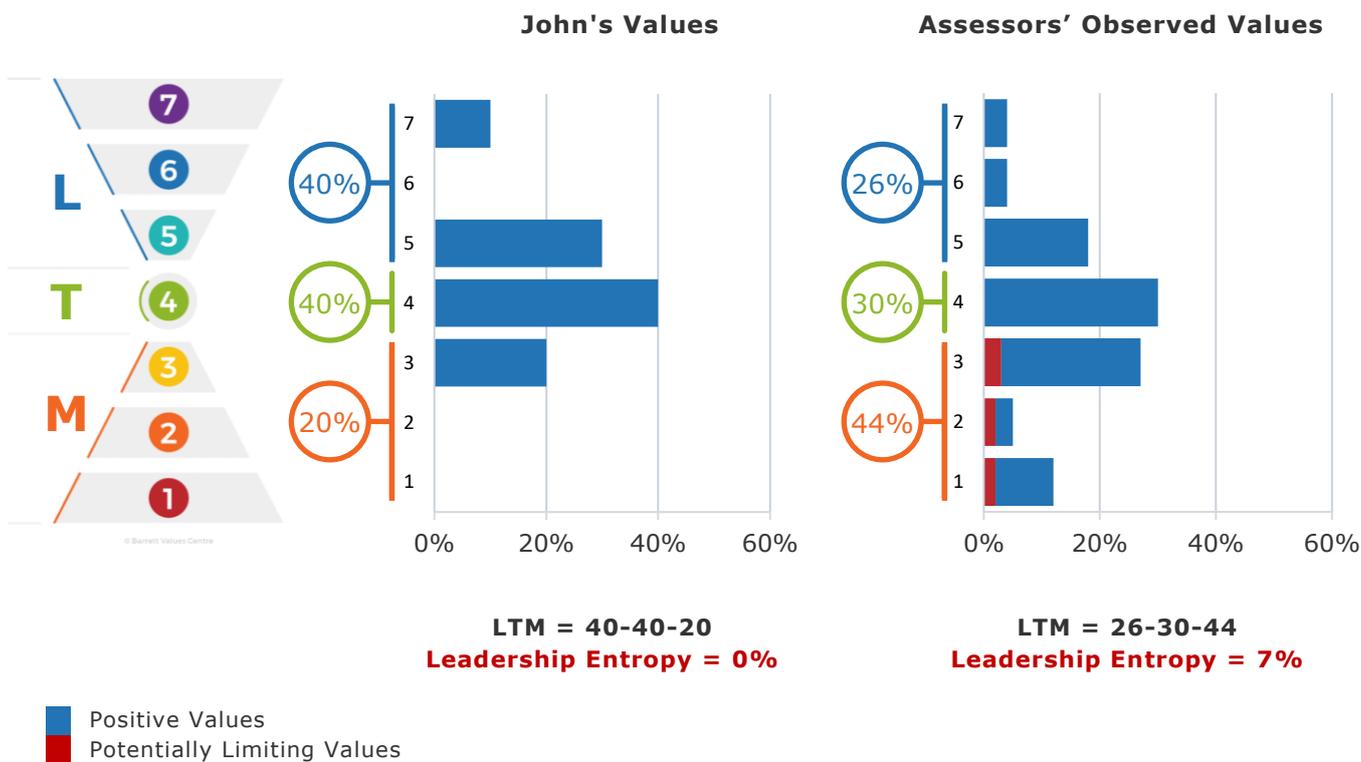
Levels 5-7 is the realm of leadership that focuses on the 'how' and 'why' of the business.

Transition (T):

Level 4 is the transition space between Leadership and Management. It reflects one's openness to change and new ideas and how to navigate that domain.

Management (M):

Levels 1-3 represent the actions needed to achieve goals and objectives, i.e. the realm of management or the 'what' of a business.



While you may feel you are operating in the realms of Transition and Leadership, your assessors have a different perspective. They see you functioning more in the area of Management.

SECTION 3: LEADERSHIP DEVELOPMENT OPPORTUNITIES

Values Integration

The values that you chose, which were not in your Assessors' Top Values list, are as follows:

Your Values	Number of Votes Received
continuous improvement	4
enthusiasm	4
courage	3
positive attitude	3
wisdom	2
inspiring	0

- What do these values mean to you? Which of these do you want the people you are working with to see more of and/or experience?
- Suggestions for strengthening the value(s) that you want better recognized:
 - Use the value word in your day-to-day vernacular.
 - Ask your assessors to what degree, if any, they see you demonstrating this value now.
 - Ask your assessors to identify the behaviors that would reflect this value.

Your Defined Areas for Improvement

- Appreciate and positively acknowledge others
- Better at storytelling
- Be more direct

Your Stated Actions for Change

- Daily practice on all three

Your Assessors' Recommendations

- Focus on building deeper relationships. Move beyond a transactional interaction and truly seek to understand others, their challenges, and their accomplishments.
- Provide greater transparency, holding yourself and the rest of the partners accountable to being more open with staff. Make time to support their understanding around business motives and directives.
- While your speed is appreciated, there is also a call for you to be aware of when you need to slow down. Ensure you are bringing people on the journey with you and creating space for them to talk and be heard. Be open to other people's perspectives and points of view, and be willing to implement their ideas, if appropriate.

SECTION 4: VERBATIM FEEDBACK FROM YOUR ASSESSORS

- I am very excited to be working with you. I'm inspired both by your drive to learn new things and your courage to try them. You are highly intentional and of high integrity. They read like platitudes stated so simply, but I really mean them. As a leader at the company, I see you operating as a master practitioner. Given that, you're stretched thin and leading less internally than you could with your many talents and gifts. That may be the right tradeoff for your career and the business, but I'd invite you to think what it might look like to build a team and a system that allows you to scale yourself. Maybe you'll see something interesting. Either way, I'm excited to be collaborating more closely over time. (Will)
- I see these qualities already, so it's more about bringing them forward a bit more: 1) Inspiring / Celebrating. It's your polarity so not sure I need to say more here. 2) Mentoring. It would be really cool to see you and maybe a rotation of the partners sharing a monthly email to the team (though I could see it being great blog content too) on the areas where you may have 'failed' as a leader recently -- serving a few purposes a) increased transparency into decision making that affect the team b) demonstration of authenticity/vulnerability and greater connection to the partners c) shared learning from the most palpable source (failure). 3) Transparency -- where appropriate. I know the partner team does their best on this front but it doesn't hurt to restate because we are all moving so fast we think that communication is widespread and then there are gaps in information. John, my experience of you from three years ago to today is markedly different. I really feel that you took the feedback from our team offsite and applied it to how you show up as a leader. It seems you've made a conscious choice to define your own path of what great leadership is and you are living it fully. It is a pleasure to witness you walk the talk. As we are just beginning to work more closely together professionally, I don't have much in terms of critical feedback to offer, though I'll encourage you to continue a practice of finding micro-mentoring moments to share your thinking and how you got from point A to point B. And I will commit to speaking up and asking as many questions as I can to try and draw out that wisdom. (Kim)
- I've always been impressed with John's ability to be extremely thoughtful, analytical and effective in his decision making. He's able to quickly analyze a situation, identify all available courses of action, and productively push a process forward while holding a very fair and balanced perspective and without overthinking things. I so appreciate and admire your depth, your intelligence and your work ethic, John. In the beginning, I found you very intimidating, and you would not have been the first person I thought I'd connect with and find a mentor in. What became clear to me over the past 2 years is that I truly feel heard and seen by you, and that was something I didn't experience from other leaders at the company in the early days. It's had a huge impact on me and my growth. I deeply value our relationship and look forward to continuing to learn from you. (Christina)
- Really glad that he's part of the leadership team because he complements the other partners with his skills and capabilities. **STRENGTHS:** + Strategic thinking: John has an incredible gift for taking a holistic perspective, synthesizing and spotting the core issues. + Integration of new ideas/ thinking: The voracious reader and learner that he is, John is able to take in new ideas and integrate them to raise the level of client work and impact. + Energy & drive: There's no stopping John, and his passion always comes through. You know that he's committed to delivering the best for clients. **IMPROVEMENTS:** + Build deeper relationships: I'd like to see John initiate relationship-

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building internally, to really understand the team. + Bring people along: John moves really quickly and it sometimes feels like he'd rather "go-it-alone". If he believes in the strength of diverse team members, it'd be helpful to bring them into his thinking and create space for them to get aligned, and then able to contribute equally. + Slow down, sometimes: While John moves quickly - and it's often a good thing! - it sometimes feel like he and the team can benefit from slowing down, being more deliberate and reflective on next steps, for example, rather than shooting from the hip.

- John, you have incredible strengths: huge capacity to be hard-driving and work hard, you confidently manifest results, and do so in such a way that you consistently walk the talk. Areas where you could improve: I wonder what you would be capable of if you had even broader range of emotional empathy and ability to connect. In the workplace, this could improve your ability to bring others along and mentor them. On a related note, for those who don't meet your standard, we wouldn't see you sink so quickly to such a deep place of judgment.
- Courage: John has guts. I've never seen him back down from a challenge. Responsibility: John's responsible mindset consistently comes through in his ways of operating; what he says and what he does. He raises the bar just by being in the room, and I don't know if he realizes that. Honesty: I trust John to be honest. This is linked to courage. I also appreciate those moments when John is honest about himself and what he's working on. It makes him more accessible and therefore safer and more lovable. Continue: Trusting yourself, your own intelligence and wisdom. I want your external resources to be clearly secondary to your own perspective, even as it relates to this values exercise. I encourage you to continue to look for answers inside yourself, paying a little less attention to external resources such as books, and I understand you are already on this path in writing your own book. I want to know what you believe and know, from your own experience. Joe Biden once described Obama as having "his heart as big as his head", and I want people to see that in you too, as I do. I believe I've shared this with you before. This metabolizing of what you learn and making it truly your own, discarding it, and/or adding to it your own lived experience, will give you a deeper authority, and by that I mean for you to become an "originator". I would say, start with your heart and your gut, and then move to your head. I've seen the changes in you, John. You have shifted from someone that used to inadvertently raise anxiety to someone that brings a great deal of safety and warmth to others. You have done this in a way that continues to keep the bar high. I'm so happy to see you using your strengths. (Kate)
- John, it's been GREAT starting to work together. This list of strengths could easily have continued toward a list of 7-10 major ones. And I had to somewhat reach for these two development opportunities (though I do think in your perpetual pursuit of "John V-next," these are opportunities). STRENGTHS: 1. Extraordinary commitment to knowledge building for himself and as an incredibly high-impact guide and teacher for others in the company / at clients. 2. Presence and corresponding ability (especially when combined with #1 here) to be seen as a valued adviser by top-level execs. 3. Prolific capacity to create and successfully manage many simultaneous effort threads across clients, internal development and personal development. 4. Strong, clear communications skills -- verbally and in writing. 5. Highest level of integrity and commands/deserves implicit trust. DEVELOPMENT OPPORTUNITIES: (let's discuss these if useful -- I'm just shooting from the hip here!). 1. At times (only at times -- perhaps when especially time-pressed?) John seems to let his own high level and fast pace of thoughts constrain space for others in a conversation or idea exchange. By being conscious of times where this leads to

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cutting off other people or somewhat quickly dismissing their ideas, he may be able to further improve his own ideas and their impact -- and give others the sense of a more-open environment where it's more "worth it" to offer thoughts. 2. Be conscious of how his intensity and drive (essential positive qualities) can affect the energy and mood of others. It may not always, for all people, draw them forward and get the best out of them. (Mark)

- Outstanding teacher, leader, and colleague.
- John's action orientation is a strength. He is able to move fast while producing high quality work and thus gets a lot done. John is a learner and is able to absorb a ton of information and quickly synthesize and then make it actionable/usable, which allows for innovation and collaboration to iterate on new IP, new ways of working with clients, etc. John delivers high quality work but knows how to focus on the things that matter. While details matter, he also doesn't sweat the small stuff, which creates room for the team to learn from mistakes and move on. He embodies the responsible mindset which creates a safe space for the team. John is great when he collaborates and he adds a ton of value internally when he does so, but he doesn't collaborate much in group settings. I see that sometimes he quickly loses patience and is triggered if meetings aren't run how he would like them or if people are staying on one subject too long. I know John is aware of this, but he can continue to find ways to collaborate and bring people in to his work, while still being efficient and moving quickly. Ultimately, I think it will create more value for John and the company overall. As a leader of the firm, John can continue to improve communications. He seems to like to keep things flexible/informal/not a big deal, and that leads to subtle messages that aren't always clearly communicated and can come across as noncommittal, which can create swirl/noise/confusion internally.
- Slow down.
- You have a strong impact on the culture of the firm. Be conscious of your presence and the non-verbal signals/expectations you set.
- John, you have extraordinary strengths. Here are 4 I wanted to call out: 1) Quickly digests big picture client situation (strategic & interpersonal) and generates quality, workable client solutions to respond to what he sees. 2) Decisive and fast in providing direction to team on what he would like to see and how he would like them to engage (objectives, deliverables, messages for client, etc.). 3) Very ready to provide quality, specific, actionable feedback after major interactions and when it occurs to him as material / important. 4) John takes time to appreciate strong contributions and to pause for brief period aimed at building relationship. Those appreciations and moments are valued and valuable. John has much respect and social capital at the company and these intentional efforts go a long way. Your role is so pivotal at the company. The result is that your growth edges have disproportionate impact. And yet, you show a great willingness to continue to go to your growth edges and learn. I believe that by applying attention and energy in these 3 areas, you can become an even more effective leader. 1) John puts tremendous energy into building his knowledge base and has a lot of confidence about his judgment in how to respond to client situations. The good of this is that he has good judgment. The shadow side of this is that he tends to control a very significant share of decisions regarding the work - design, content, delivery, etc. In the event of a tie between John's view and differing views on the team, John goes with John's view 75%+. There is space to offer alternative views, but there is less space to shape the direction of the work with John than with other partners. When John doesn't have a point

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of view yet, recommendations are welcomed (especially if they fit the line of his thinking.) When John has a point of view, his willingness to move is limited - and occasionally his response to alternative views is one that shows non-verbal irritation. This can invite a dynamic of "guess what John is thinking." 2) John has a well-embodied value of "challenge" and he makes use of it to invite the team to stretch ourselves and to be our best. It's a great strength. The shadow side of the strength is that there is an underlying feeling that in the pursuit of maintaining a very high bar, John ends up relating to people as means. My sense is that John respects me and cares about me to a certain sincere extent, and yet I can also feel a certain arm's length aspect to my relationship with John. I have an intuition that the relationships (especially with junior and mid-level staff) may be somewhat disposable if they cease to fit his ideal person in the ideal role. 3) John shares high quality feedback often. And yet, I am recently discovering that there is also material feedback (or context) that will often be missing that interferes with the feedback landing with an appropriate sense of (this is most important, this is what this level of performance means in terms of what I am looking for from you, etc.) If John improved at providing a more complete context of priority and consequence around his feedback, I suspect he could get even more mileage from his team in terms of performance and development over time.

- John is a highly respected role model for all of us at the company. His focus on continuous improvement and the growth of the firm is incredibly valuable.

NEXT STEPS

Suggested Next Steps and Areas for Reflection

John, it is clear that you are a highly regarded leader and are well thought of by your assessors. However, it appears that there are some underlying issues centered around how you connect with others that may be impeding your effectiveness and ability to reach your potential. There is a clear call for you to build relationships. People want to feel a stronger connection to you and would like you to get to know them as well. Your ability to operate at such a rapid pace has clearly served you well, however, it is also important to think about how it may be hindering you. Your assessors are asking you to make sure that you bring people on the journey with you, while demonstrating an awareness of the pressures they may be experiencing. What may be preventing you back from doing this already?

Your assessors are also asking you to truly listen to them. They want you to create space for them to talk and ask that you be open to different ideas and perspectives, ensuring that others feel heard. Almost all of your assessors noted your strength in building knowledge, and you yourself value your "wisdom". To what extent may your drive for more theoretical knowledge be preventing you from being open to the insights you can also gain from those around you?

Recommendations

- First, show this to a significant other or a close personal friend because they most likely know you better than your assessors and may be able to offer further insights and support for what you might want to achieve.
- Second, get back to your assessors and let them know the high-level points that you got from this report. This accomplishes three things:
 - It is your opportunity to say 'thank you' for taking the time to complete the survey. These are busy people who chose to do this for you.
 - They are curious and will want to know the impact of their input. If you say nothing, they may think it was a waste of their time, which could lead to cynicism.
 - This is an opportunity to open conversations about items in the report that you want more information or clarity on, or an opportunity to get specific suggestions on actions for you to take.
- Design your action plan.

BARRETT LEADERSHIP MODEL



SEVEN STYLES OF LEADERSHIP

In this framework, there is no right or wrong. The model is divided into seven levels, each representing a different and significant business need, all of which are equally important. The principal focus of Levels 1-3 is on creating a financially stable organization with a strong customer base that has efficient systems and processes. The purpose of Level 4 is to promote continuous learning and employee empowerment so that the organization can be responsive and adaptable to changes in its internal and external environments. The goal of Levels 5-7 is to provide the vision, mission, and values for the organization to build internal and external connectivity and to have a positive contribution on society.

LEVEL 1: CRISIS MANAGER

Crisis Managers understand the importance of financial stability and/or shareholder returns and look after the health and safety of employees. One of the most important attributes of these leaders is the ability to handle crises. They are calm and decisive in the midst of chaos and uncertainty.

The potentially limiting aspects of this level are generated from fears about not having enough authority or power. The greater their fears, the more controlling or cautious these leaders can become.

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LEVEL 2: RELATIONSHIP MANAGER

Relationship Managers invest time in building harmonious working relationships, both internally and externally. They communicate and listen, show respect for their employees and customers, and are willing to address difficult interpersonal issues in a timely manner.

The potentially limiting aspects of this level stem from fears about not being liked, and/or not getting what they want from others. Consequently, they may avoid conflicts and responsibility and or may be overly influenced by a need to please others.

LEVEL 3: PERFORMANCE MANAGER

Performance Managers focus on excellence and delivering results. They build systems and processes that create order, efficiency, and enhance productivity. They are logical and rational decision-makers who move to capitalize on opportunities. They are driven to succeed and focused on providing the best possible goods or services.

The potentially limiting aspects of this level reflect a fear of failure or loss of status. Therefore, there are some who use their power and position to strengthen their sense of self. They may work long hours or become overly demanding to get what they want and prove their worth.

LEVEL 4: FACILITATOR/INNOVATOR

Facilitator/Innovators seek input, build consensus, and empower their team members. They support the development of new ideas and embrace continuous learning. They become promoters of others, encouraging them to express themselves, share their ideas and be accountable for their actions. They promote team building. They courageously take on challenges. This is the transition space from being a manager to becoming a leader.

LEVEL 5: AUTHENTIC LEADER

Authentic Leaders are role models for consistent values-driven behaviors. By creating an environment of openness, transparency, and fairness, they build trust and commitment. They often demonstrate enthusiasm, passion, and creativity. They are honest and truthful and display integrity in their endeavors.

LEVEL 6: MENTOR/PARTNER LEADER

Mentor/Partner Leaders are motivated by a desire to create win-win scenarios through collaboration. They are true servant-leaders who care about their people, seeking ways to help them find fulfillment through their work. They are active in developing other leaders and building talent for the organization through mentoring and coaching.

LEVEL 7: VISIONARY LEADER

Visionary Leaders have a long-term perspective. They are legacy-focused and support social responsibility. They act with ethics, humility, and wisdom. Their actions and decisions are guided with by a bigger picture and its impact on people, processes, and overall purpose.

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