

## Simple Succession Planning Guide

SIGMA's Simple Succession Planning is a straightforward process for identifying and developing internal talent to replenish existing talent when it exits the organization.

This planning guide takes users through SIGMA's 6-stage succession cycle to: identify critical leadership roles, build leader success profiles, nominate high potential talent, assess development needs, develop talent, and measure your organization's progress. The guide provides forms for each stage.

# SIGMA Succession simple succession process



## identify critical roles

Identify which roles your organization should target through its succession program.

Critical Role Identification Questionnaire

## build success profile

Describe the talent composition required for each critical role at the present time and according to your organization's future needs.

Success Profile

## nominate succession candidates

Select succession candidates for each critical role through a nomination survey.

Succession Nomination Survey  
Succession Bench Summary

## assess development needs

Summarize the talent profile of each succession candidate, and identify gaps to target through development.

Succession Profile

## develop talent

Outline or update development plans for each candidate, and track recommended and completed development activities.

Development Plan  
Development Activities Tracker

## measure progress

Update the scorecard tracking various indicators of improved succession planning outcomes.

Talent Progress Scorecard

# simple succession process



stages

identify  
critical roles

build success  
profile

nominate  
succession  
candidates

assess  
development  
needs

develop  
talent

measure  
progress

resources

Critical Position  
Assessment

Key Criteria

Readiness Survey

Competency:  
SIGMARadius, LSP

Development Plan

Talent Progress  
Scorecard

Experience /  
Education

Character: LCIA

Competency

Commitment

Character

Emotional  
Intelligence: MEIA-W

Commitment

deliverables

Critical Position List

Success Profile

Depth Chart

Development Plan

Top 5

Talent Profiles

Talent Profiles with  
Assessment Scores

# SIGMA Succession identify critical roles



## Critical Role Identification Questionnaire

| Critical Role | Impact to Business Operations | External Candidate Availability | Internal Bench Strength | Unique Skill Set or Knowledge Base | TOTAL | ★ |
|---------------|-------------------------------|---------------------------------|-------------------------|------------------------------------|-------|---|
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |
|               | 1 2 3                         | 1 2 3                           | 1 2 3                   | 1 2 3                              |       |   |

# 2017 Success Profile

| Succession Position | Current Incumbent | Exit Year | Urgency |
|---------------------|-------------------|-----------|---------|
|                     |                   |           | ☆☆☆☆☆   |

## Location

## Level

## Direct Reports

## Position Criteria

## Leadership Profile

## Competency: Potential

## Competency: Performance

## Character

## Emotional Intelligence

## Commitment

Other

Other

# nominate succession candidates

## Succession Nomination Survey

Position:

Candidate:

How much confidence do you have in this candidate's ability to perform effectively in this position with development in required areas?

not sufficiently acquainted

☐

not at all confident

☐

slightly confident

☐

moderately confident

☐

very confident

☐

When will this candidate be ready to fill this position?

not sufficiently acquainted

☐

ready now

☐

ready 1 to 3 years

☐

ready 3 to 5 years

☐

ready 5+ years

☐

ready never

☐

Please express any other comments you have, if any, about the ability of this candidate to effectively perform in this position.

Position:

Candidate:

How much confidence do you have in this candidate's ability to perform effectively in this position with development in required areas?

not sufficiently acquainted

☐

not at all confident

☐

slightly confident

☐

moderately confident

☐

very confident

☐

When will this candidate be ready to fill this position?

not sufficiently acquainted

☐

ready now

☐

ready 1 to 3 years

☐

ready 3 to 5 years

☐

ready 5+ years

☐

ready never

☐

Please express any other comments you have, if any, about the ability of this candidate to effectively perform in this position.

## nominate succession candidates

2017 Succession  
Bench

| Succession Position | Current Incumbent | Exit Year | Urgency | Bench Strength |    |    |
|---------------------|-------------------|-----------|---------|----------------|----|----|
|                     |                   |           | ☆☆☆☆☆   | C:             | B: | A: |

## Candidate List

|         | Candidate Name |       | Organization Demographics |          |          | Progression on Succession List |         |         |
|---------|----------------|-------|---------------------------|----------|----------|--------------------------------|---------|---------|
|         | Last           | First | Position                  | Function | Location | Level C                        | Level B | Level A |
| Level A |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
| Level B |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
| Level C |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |
|         |                |       |                           |          |          |                                |         |         |

# assess development needs

a

## 2017 Succession Profile

Succession Position

Current Incumbent

Exit Year

Urgency

☆☆☆☆☆



Candidate

### Organization Demographics

Position

Location

Age

Service

Readiness

### Education and Experience

Education

Experience

### Position Criteria

☐☐☐☐☐☐☐☐☐☐☐☐

### Leadership Profile Assessment Gaps

Competency: Potential

Character

Emotional Intelligence

Competency: Performance

Commitment

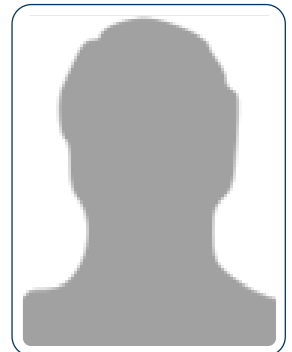
Other

# SIGMA Succession develop talent

## 2017 Development Plan



| Succession Candidate | Position | Function |
|----------------------|----------|----------|
|                      |          |          |



| Candidate For | Position | Current Incumbent | Readiness | Timeline |
|---------------|----------|-------------------|-----------|----------|
| 1.            |          |                   | ☆☆☆☆☆     |          |
| 2.            |          |                   | ☆☆☆☆☆     |          |
| 3.            |          |                   | ☆☆☆☆☆     |          |

### Top Development Areas

- |    |    |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

### Development Plan

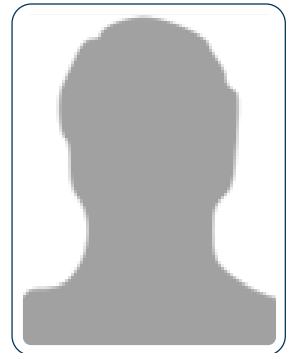
|             | Development Area | Goal | Action | Complete By | Progress / Comments |
|-------------|------------------|------|--------|-------------|---------------------|
| 0-3 Months  |                  |      |        |             |                     |
|             |                  |      |        |             |                     |
|             |                  |      |        |             |                     |
| 3-6 Months  |                  |      |        |             |                     |
|             |                  |      |        |             |                     |
|             |                  |      |        |             |                     |
| 6-12 Months |                  |      |        |             |                     |
|             |                  |      |        |             |                     |
|             |                  |      |        |             |                     |
| 12+ Months  |                  |      |        |             |                     |
|             |                  |      |        |             |                     |
|             |                  |      |        |             |                     |

# SIGMA Succession develop talent

## 2017 Development Activities



| Succession Candidate | Position | Function |
|----------------------|----------|----------|
|                      |          |          |



| Candidate For | Position | Current Incumbent | Readiness | Timeline |
|---------------|----------|-------------------|-----------|----------|
| 1.            |          |                   | ☆☆☆☆☆     |          |
| 2.            |          |                   | ☆☆☆☆☆     |          |
| 3.            |          |                   | ☆☆☆☆☆     |          |

| Development Activities |                  |                              |                              |                             |   |       |
|------------------------|------------------|------------------------------|------------------------------|-----------------------------|---|-------|
|                        | Self Development | Internal Leadership Training | External Leadership Training | Cross-Functional Experience | Global Rotation / International Project | Other |
| Completed              |                  |                              |                              |                             |   |       |
|                        |                  |                              |                              |                             |   |       |
|                        |                  |                              |                              |                             |   |       |
|                        |                  |                              |                              |                             |   |       |
|                        |                  |                              |                              |                             |   |       |
| Recommended            |                  |                              |                              |                             |   |       |
|                        |                  |                              |                              |                             |   |       |
|                        |                  |                              |                              |                             |   |       |
|                        |                  |                              |                              |                             |   |       |
|                        |                  |                              |                              |                             |   |       |

# SIGMA Succession measure progress



| Talent Progress Scorecard                      |      |  |  |  |
|--|------|--|--|--|
| Indicator                                      | Date |  |  |  |
|  |      |  |  |  |
| Critical Positions Filled Internally (%)       |      |  |  |  |
| Management Positions Filled Internally (%)     |      |  |  |  |
| Average Time Hi-Potentials in Same Role (Yrs.) |      |  |  |  |
| Hi-Potential Turnover (%)                      |      |  |  |  |
| Critical Positions with 3+ Successors (%)      |      |  |  |  |
| Average Years Till Ready                       |      |  |  |  |
| Hi-Potential Engagement                        |      |  |  |  |
| Individual Improvement                         |      |  |  |  |



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# appendix: SIGMA assessments



## Competency – Performance

**SIGMARadius**  
SIGMARadius 360  
Feedback

## Competency – Potential

**LSP**  
Leadership Skills Profile

## Character

**LCIA**  
Leadership Character  
Insight Assessment

## Commitment

**Commitment**  
Commitment to Lead

## Emotional Intelligence

**MEIA-W**  
Multidimensional  
Emotional Intelligence  
Assessment –  
Workplace

# appendix: SIGMA assessments



## LSP Leadership Skills Profile

The LSP is a personality-based leadership assessment designed to identify and develop top leadership talent. Select from 42 leadership competencies and specify a benchmark profile to align the LSP with your custom requirements.

### REPORT

- LSP Selection Report (LSP-SR): predicts performance on critical leadership competencies and provides detailed explanations as to how the respondent's personality affects leadership effectiveness
- LSP Development Report (LSP-DR): includes tools and techniques designed to empower leaders

Use the LSP-SR and LSP-DR in tandem to deliver a powerful, complementary leadership solution.

### MEASURED

#### Cognitive Skills

- Analytical Orientation
- Creativity
- Decisiveness
- Objectivity
- Risk Taking
- Technical Orientation
- Thoroughness

#### Interpersonal Skills

- Communication
- Conflict Management
- First Impression
- Formal Presentation
- Interpersonal Relations
- Negotiation
- Open-Mindedness
- Persuasiveness
- Sensitivity
- Social Astuteness

#### Personal Qualities

- Achievement and Motivation
- Ambition
- Dependability
- Emotional Control
- Flexibility
- General Leadership Effectiveness
- Independence
- Listening
- Self-Discipline
- Self-Esteem

#### Teamwork, Supervision, Planning, and Productivity

- Assuming Responsibility
- Attracting Staff
- Delegation
- Emphasizing Excellence
- Facilitating Teamwork
- Interpersonal Role Model
- Involving Direct Reports
- Monitoring and Controlling
- Motivating Others
- Organizational Spokesperson
- Organizing the Work of Others
- Productivity
- Short-Term Planning
- Strategic Planning
- Vision



## SIGMA Radius SIGMA Radius 360 Feedback

SIGMA Radius is a comprehensive 360° feedback solution designed to build and develop 51 essential leadership competencies. Ratings are drawn from leaders, colleagues, and direct/indirect reports and combined with self-ratings to provide a multisource perspective on leadership performance. SIGMA Radius can be benchmarked to include only those competencies deemed most important.

### REPORT

- Leadership Effectiveness Report: includes rater score charts, competency definitions, rater comments, action steps for development, and references to key readings; can be paired with the Development Guide, a complementary resource designed to help leaders interpret results, leverage strengths, and build on development opportunities

### MEASURED

#### Cognitive Managerial Skills

- Analytical Orientation
- Business Acumen
- Creativity
- Decisiveness
- Objectivity
- Prioritizing
- Risk Taking
- Technical Orientation
- Thoroughness

#### Interpersonal Managerial Skills

- Client / Customer Focus
- Communication
- Conflict Management
- First Impression
- Formal Presentation
- Interpersonal Relations
- Negotiation
- Open-Mindedness
- Operating Upwards
- Persuasiveness

- Sensitivity
- Social Astuteness

#### Personal Managerial Skills

- Achievement and Motivation
- Ambition
- Dependability
- Desire to Learn
- Demonstrating Understanding
- Emotional Control
- Flexibility
- Independence
- Integrity
- Listening Skills
- Self-Discipline
- Self-Esteem
- Valuing Diversity

#### Teamwork, Supervision, Productivity, and Planning

- Assuming Responsibility

- Attracting Staff
- Delegation
- Developing and Coaching Others
- Emphasizing Excellence
- Facilitating Teamwork
- Inspirational Role Model
- Involving Direct Reports
- Monitoring and Controlling
- Motivating Others
- Organizational Spokesperson
- Organizing the Work of Others
- Productivity
- Short-Term Planning
- Strategic Planning
- Vision
- Work-Life Balance

#### Overall Effectiveness

# appendix: SIGMA assessments



## Leadership Character Insight Assessment

The LCIA measures 11 character dimensions and their corresponding elements. It is designed to provide practical insight into the nature of character and its role in building strong leaders and organizations, describe how dimensions interact to influence leadership effectiveness, and identify, grow, and develop character strengths.

### REPORT

- LCIA-Self Report: provides descriptions for the 11 character dimensions, a summary chart, and dimension-by-dimension results with element scores, descriptions of element and dimension interactions, and development resources
- LCIA-360 Report: in addition to the above, this report includes developmental comments from raters

### MEASURED

#### Judgment

- Situationally Aware
- Cognitively Complex
- Analytical
- Decisive
- Critical Thinker
- Intuitive
- Insightful
- Pragmatic
- Adaptable

#### Transcendence

- Appreciative
- Inspired
- Purposive
- Future-Oriented
- Optimistic
- Creative

#### Drive

- Passionate
- Vigorous
- Results-Oriented
- Demonstrates Initiative
- Strives for Excellence

#### Collaboration

- Cooperative
- Collegial
- Open-Minded
- Flexible
- Interconnected

#### Humanity

- Considerate
- Empathetic
- Compassionate
- Magnanimous
- Forgiving

#### Humility

- Self-Aware
- Modest
- Reflective
- Continuous Learner
- Respectful
- Grateful
- Vulnerable
- Curious

#### Integrity

- Authentic
- Candid
- Transparent
- Principled
- Consistent

#### Temperance

- Patient
- Calm
- Composed
- Self-Controlled
- Prudent

#### Justice

- Fair
- Equitable
- Proportionate
- Even-Handed
- Socially Responsible

#### Accountability

- Takes Ownership
- Accepts Consequences
- Conscientiousness
- Responsible

#### Courage

- Brave
- Determined
- Tenacious
- Resilient
- Confident



## Multidimensional Emotional Intelligence Assessment – Workplace

The MEIA-W is designed to measure emotional intelligence (EI) in work settings. Emotional intelligence allows individuals to perceive, understand, regulate, and express emotions. The MEIA-W can be used to select talent, develop critical people skills, identify and solve problems that affect performance and work relationships, and understand and optimize team and workplace dynamics.

### REPORT

- MEIA-W Report: provides a multi-faceted profile of an individual's EI in a work environment; includes a summary chart, dimension descriptions, interpretation guide, and development feedback

The MEIA-W is the only trait-based, self-report measure that captures all 10 facets of Salovey and Mayer's influential model of EI.

### MEASURED

Recognition of Emotion in the Self  
 Regulation of Emotion in the Self  
 Recognition of Emotion in Others  
 Regulation of Emotion in Others  
 Nonverbal Emotional Expression  
 Empathy  
 Intuition versus Reason  
 Creative Thinking  
 Mood Redirected Attention  
 Motivating Emotions



## LSP Selection Report

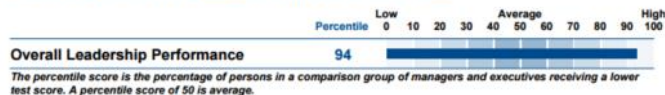
Sam Sample LSP Selection Report Page 2

### LSP-SR Executive Summary

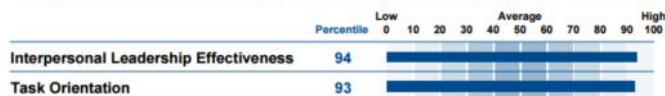
This page provides an overview of Mr. Sample's results. It begins with a chart based on the sum of all 42 leadership competencies. A second chart divides Mr. Sample's overall results into two broad dimensions, his *Interpersonal Leadership Effectiveness*, and his *Task Orientation* (his focus on completing the tasks for which he has responsibility). Finally, Mr. Sample's scores on these two broad dimensions are plotted on a performance grid with *Interpersonal Leadership Effectiveness* as the vertical axis and *Task Orientation* as the horizontal.

All scores in this report are expressed in terms of percentiles, which differ from percentages in that they compare Mr. Sample's expected performance with that of a large group of senior managers and executives. By definition, a score at the 50th percentile is average. For more information on percentiles and how to properly interpret this report, please refer to the LSP manual.

### Overall Expected Leadership Performance

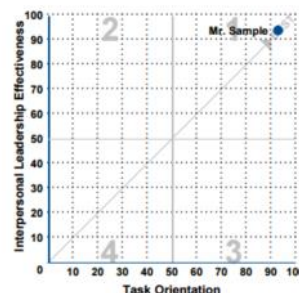


### Interpersonal Leadership Effectiveness and Task Orientation



### Performance Grid

Explanation: Candidates falling in quadrant 1 have scored above average on both measures and have the greatest potential to succeed in the job role. Candidates falling in quadrant 4 have scored below average on both measures and have the least potential to succeed in the job role.



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Sam Sample LSP Selection Report Page 12

### Risk Taking



The willingness to take sound, calculated risks, based on good judgment, in situations where the outcome is uncertain.

*Mr. Sample's expected level of RISK TAKING performance is in the VERY HIGH range.*

- Competitive and ambitious individuals, such as Mr. Sample, will often undertake calculated risks in order to achieve desired results.
- Entertaining and dramatic individuals, such as Mr. Sample, tend to take risks in social situations. This is because they enjoy being the center of attention and may be willing to take a risk in order to gain notice or recognition from others.
- Mr. Sample tends to act on impulse and make decisions quickly. This is typically consistent with someone who likes to take risks. Mr. Sample likely recognizes when it may be necessary to abandon a detail-oriented approach in favor of one that allows him to proceed with a calculated business risk.
- Curious and investigative, Mr. Sample usually makes sure he thoroughly understands problems and situations so that he can take informed risks when dealing with challenging issues.
- Concerned with presenting a favorable image of himself to others, Mr. Sample will likely ensure that he conveys an image of a decisive leader who takes calculated risks based on good judgment.
- Individuals with a wide range of interests, such as Mr. Sample, tend to be motivated to do the necessary background research to take informed risks.
- Mr. Sample tends to be analytical and clever, and typically enjoys pursuing topics in depth, regardless of their difficulty. This intellectual style helps him to research and analyze risks so that decisions are based on sound reasoning.
- Mr. Sample's comfort with others and his tendency to identify with their struggles and accomplishments are helpful qualities for acting in uncertain situations. This is likely because he tends to carefully consider potential risks to others before making an important decision.
- Socially confident individuals, such as Mr. Sample, are not easily influenced by others and are usually willing to take risks if necessary to advance project goals. They are likely confident and can easily defend their decisions and choices.
- Because Mr. Sample tends to be a team player, he will usually collaborate with others and take reasonable risks to further the goals of the group.
- Mr. Sample is a natural risk taker who does not tend to hesitate to pursue opportunities that involve an element of risk. He may enjoy taking chances and ensuring that his subordinates are able to work in an exciting climate that encourages informed risk taking.

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# appendix: SIGMA assessments



## LSP Focus Development Report

Sam Sample LSP Focus Page 3

### Leadership Skills Snapshot

#### Personal Strengths

| Leadership Competency       | Definition  | Standing | Feedback Page |
|-----------------------------|---|----------|---------------|
| Sensitivity                 | Showing a supportive, considerate, sensitive, and caring attitude toward the needs, concerns, moods, agendas, interests, and aspirations of others.     | ✓        |               |
| Inspirational Role Model    | The ability to set a positive and inspirational example for subordinates to follow.   | ✓        |               |
| Social Astuteness           | The ability to accurately read and respond diplomatically to organizational trends and norms, as well as effectively deal with organizational politics. | ✓        |               |
| First Impression            | The ability to create a positive impact through social confidence, sincerity, dress, and verbal fluency.  | ✓        |               |
| Motivating Others           | Showing enthusiasm and providing encouragement, recognition, constructive criticism, and coaching to subordinates.                                      | ✓        |               |
| Organizational Spokesperson | Serving as figurehead and spokesperson for one's unit, and effectively promoting and defending the interests of one's subordinates.                     | ✓        |               |
| Achievement and Motivation  | Demonstrating the motivation to work hard, be successful, achieve difficult goals, and complete challenging tasks.                                      | ✓        |               |
| Interpersonal Relations     | Relating to others in an outgoing, friendly, warm, and personable manner in order to establish and maintain effective interpersonal relationships.      | ✓        |               |
| Persuasiveness              | The ability to sell others on ideas, approaches, products, and services.  | ✓        |               |
| Flexibility                 | The ability to adapt one's style or approach in order to adjust to changing circumstances or to achieve an objective.                                   | ✓        |               |

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Sam Sample LSP Focus

#### Communication

Keeping subordinates and superiors informed about decisions, even developments that affect them.

#### Development feedback:

- Your results suggest that you are an energetic person who does easily. Energetic, restless individuals would rather focus on start projects instead of sitting down with co-workers to keep them up project developments. Remember that managers provide a crucial upward and downward flow of information in organizations. Be aside some time to communicate with staff - you might find it more time efficient to "bundle" important issues and then address collectively at meetings or during group announcements.
- Your pattern of results suggests that you tend to persevere on in the face of great difficulty. Although this trait is often an asset become so immersed in your own work that you forget to keep informed about projects, important decisions, deadlines, and even Remember that part of your role is to keep upper management stakeholders informed regarding progress on relevant projects. also remember that team members have personal lives and projects may be distracting them. Take it upon yourself to track progress everyone informed about the status of project plans.

#### Thoroughness

The ability to attend to detail and develop a comprehensive approach problems.

#### Development feedback:

- You tend to have an entertaining and dramatic interpersonal style there is certainly a place for a charismatic, high profile leader, an engaging and amusing others may interfere with your ability to on the details when completing your work. In addition, you may neglect to listen carefully to others who may have valuable suggestions essential instructions to pass along. Make a conscious effort to on information related to the task or project at hand, in order to you are catching small mistakes and remaining vigilant about in details. If you follow others' instructions carefully, you may improve your thoroughness and attention to detail.

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### LSP DEVELOPMENT GUIDE

Congratulations on completing the first step in your leadership development. You recently took the Leadership Skills Profile (LSP) and received the Leadership Skills Profile report in return. The LSP serves as the foundation from which to build your individual development plan (IDP).

As you begin your journey, recognize that you need to have a plan, or know your route and destination before you start. This workbook will help you map out a plan by guiding you through a number of activities and development milestones designed to help you identify and focus on one or two critical competencies. Feel free to modify the activities to suit the unique needs of your role and organization - make it work for you.

Remember that your development is an ongoing process. Use the chart below to track your progress and check off each activity once complete. Approximate timelines for each activity are provided to help you balance your time.

#### Progress Report

| EXPLORE   |   |
|---|---|
| Activity 1: Charting Your Course  | Date completed? Time<br>3 minutes   |
| VALIDATE  |   |
| Activity 2: Perspectives<br>MILESTONE: my5  | Date completed? Time<br>15 minutes<br>3 minutes                           |
| MOTIVATE  |   |
| Activity 3: Interests<br>Activity 4: Opportunities<br>Activity 5: Rewards<br>MILESTONE: my3 | Date completed? Time<br>10 minutes<br>10 minutes<br>5 minutes<br>1 minute |
| FOCUS   |   |
| Activity 6: Zoom In<br>MILESTONE: myFOCUS   | Date completed? Time<br>20 minutes<br>1 minute                            |
| DEVELOP   |   |
| Activity 7: Zoom Out<br>MILESTONE: myPLAN   | Date completed? Time<br>10 minutes<br>ongoing...                          |



#### Key Terms:

The LSP is a personality-based assessment that uses several personality traits to predict performance on a series of leadership competencies.

The LSP report lists your strengths and development opportunities based on your responses to the LSP. It also provides customized development feedback for each leadership competency.

The competencies listed in your report have been identified by Subject Matter Experts (SMEs) as important for success in your organization or role.

Strengths represent competencies where you excel because your personality or natural tendencies support your performance in these areas.

Development Opportunities should be considered relative to your strengths and represent competencies that show readiness for development.

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# SIGMA Succession appendix: SIGMA assessments



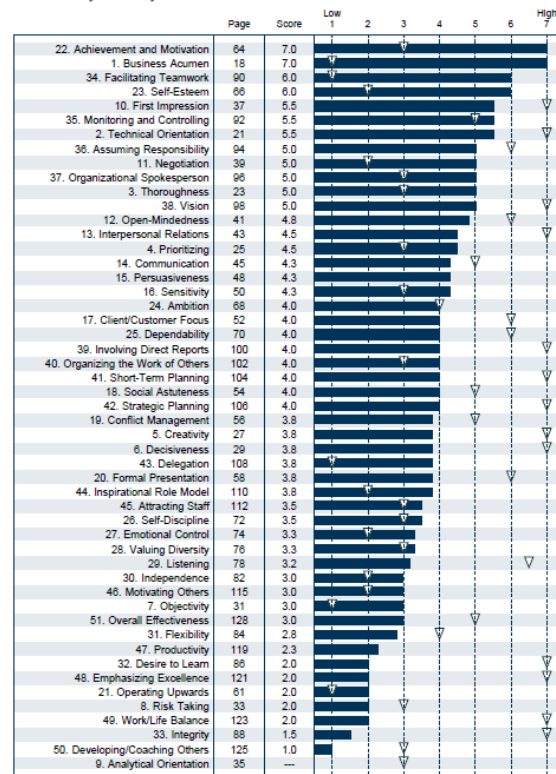
## 360° Competency

Sam Sample

Leadership Effectiveness Report

### Your Leadership Effectiveness Snapshot

Listed below are the 51 behaviours measured by this survey. Page references to detailed feedback charts for each behaviour are presented. The scores are presented in order from your highest average rating given to you by all your raters to your lowest rating. The numbering of the behaviours reflects the order in which they appear in Section 2. The triangles show how you rated yourself on each behaviour.



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Sam Sample

Leadership Effectiveness Report

### 5. Creativity

Demonstrating the ability to initiate original and innovative ideas, products, and approaches.

| Effectiveness Scale                     |       |     |       | Low | 1 | 2 | 3 | 4 | 5 | 6 | High |
|---|-------|-----|-------|-----|---|---|---|---|---|---|------|
| Rater Category                          | Count | N/O | Score |     |   |   |   |   |   |   |      |
| Ratings by your leaders                 | 1     | 0   | 2.0   |     |   |   |   |   |   |   |      |
| Ratings by your colleagues              | 3     | 0   | 4.3   |     |   |   |   |   |   |   |      |
| Ratings by your direct/indirect reports | 0     | 0   | —     |     |   |   |   |   |   |   |      |
| Other                                   | 0     | 0   | —     |     |   |   |   |   |   |   |      |
| Ratings by all your raters              | 4     | 0   | 3.8   |     |   |   |   |   |   |   |      |
| Distribution of ratings                 | 4     | 0   | 3.8   | 1   | 1 | 0 | 0 | 1 | 0 | 1 |      |
| Self rating                             | 7.0   |     |       |     |   |   |   |   |   |   |      |

#### Leader Comments

Leader One: This represents the comments provided by Leader#1 on Creativity

#### Other Comments

This represents the comments provided by Colleague#1 on Creativity

This represents the comments provided by Colleague#3 on Creativity

This represents the comments provided by Colleague#2 on Creativity

#### Action Steps to Consider

- Apply your creative thinking skills.

Some researchers believe that highly creative individuals can be distinguished from less creative people by their expertise and commitment to their work. They build on what they know by manipulating, combining, and organizing information in a new way. This process often involves using information and ideas that are already known, and combining them together.

- Implement your ideas.

It is one thing to come up with a new idea. Part of the innovation, however, is the implementation of the idea.

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# appendix: SIGMA assessments



## LSP Focus Development Report

Sam Sample LSP Focus Page 3

### Leadership Skills Snapshot

#### Personal Strengths

| Leadership Competency       | Definition  | Standing | Feedback Page |
|-----------------------------|---|----------|---------------|
| Sensitivity                 | Showing a supportive, considerate, sensitive, and caring attitude toward the needs, concerns, moods, agendas, interests, and aspirations of others.     | ✓        |               |
| Inspirational Role Model    | The ability to set a positive and inspirational example for subordinates to follow.   | ✓        |               |
| Social Astuteness           | The ability to accurately read and respond diplomatically to organizational trends and norms, as well as effectively deal with organizational politics. | ✓        |               |
| First Impression            | The ability to create a positive impact through social confidence, sincerity, dress, and verbal fluency.  | ✓        |               |
| Motivating Others           | Showing enthusiasm and providing encouragement, recognition, constructive criticism, and coaching to subordinates.                                      | ✓        |               |
| Organizational Spokesperson | Serving as figurehead and spokesperson for one's unit, and effectively promoting and defending the interests of one's subordinates.                     | ✓        |               |
| Achievement and Motivation  | Demonstrating the motivation to work hard, be successful, achieve difficult goals, and complete challenging tasks.                                      | ✓        |               |
| Interpersonal Relations     | Relating to others in an outgoing, friendly, warm, and personable manner in order to establish and maintain effective interpersonal relationships.      | ✓        |               |
| Persuasiveness              | The ability to sell others on ideas, approaches, products, and services.  | ✓        |               |
| Flexibility                 | The ability to adapt one's style or approach in order to adjust to changing circumstances or to achieve an objective.                                   | ✓        |               |

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Sam Sample LSP Focus

#### Communication

Keeping subordinates and superiors informed about decisions, even developments that affect them.

#### Development feedback:

- Your results suggest that you are an energetic person who does easily. Energetic, restless individuals would rather focus on start projects instead of sitting down with co-workers to keep them up project developments. Remember that managers provide a crucial upward and downward flow of information in organizations. Be aside some time to communicate with staff - you might find it more time efficient to "bundle" important issues and then address collectively at meetings or during group announcements.
- Your pattern of results suggests that you tend to persevere on in the face of great difficulty. Although this trait is often an asset become so immersed in your own work that you forget to keep informed about projects, important decisions, deadlines, and even Remember that part of your role is to keep upper management stakeholders informed regarding progress on relevant projects. also remember that team members have personal lives and projects may be distracting them. Take it upon yourself to track progress everyone informed about the status of project plans.

#### Thoroughness

The ability to attend to detail and develop a comprehensive approach problems.

#### Development feedback:

- You tend to have an entertaining and dramatic interpersonal style there is certainly a place for a charismatic, high profile leader, an engaging and amusing others may interfere with your ability to on the details when completing your work. In addition, you may neglect to listen carefully to others who may have valuable suggestions essential instructions to pass along. Make a conscious effort to on information related to the task or project at hand, in order to you are catching small mistakes and remaining vigilant about in details. If you follow others' instructions carefully, you may improve your thoroughness and attention to detail.

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### LSP DEVELOPMENT GUIDE

Congratulations on completing the first step in your leadership development. You recently took the Leadership Skills Profile (LSP) and received the Leadership Skills Profile report in return. The LSP serves as the foundation from which to build your individual development plan (IDP).

As you begin your journey, recognize that you need to have a plan, or know your route and destination before you start. This workbook will help you map out a plan by guiding you through a number of activities and development milestones designed to help you identify and focus on one or two critical competencies. Feel free to modify the activities to suit the unique needs of your role and organization - make it work for you.

Remember that your development is an ongoing process. Use the chart below to track your progress and check off each activity once complete. Approximate timelines for each activity are provided to help you balance your time.

#### Progress Report

| EXPLORE   |   |
|---|---|
| Activity 1: Charting Your Course  | Date completed? Time<br>3 minutes   |
| VALIDATE  |   |
| Activity 2: Perspectives<br>MILESTONE: my5  | Date completed? Time<br>15 minutes<br>3 minutes                           |
| MOTIVATE  |   |
| Activity 3: Interests<br>Activity 4: Opportunities<br>Activity 5: Rewards<br>MILESTONE: my3 | Date completed? Time<br>10 minutes<br>10 minutes<br>5 minutes<br>1 minute |
| FOCUS   |   |
| Activity 6: Zoom In<br>MILESTONE: myFOCUS   | Date completed? Time<br>20 minutes<br>1 minute                            |
| DEVELOP   |   |
| Activity 7: Zoom Out<br>MILESTONE: myPLAN   | Date completed? Time<br>10 minutes<br>ongoing...                          |



#### Key Terms:

The LSP is a personality-based assessment that uses several personality traits to predict performance on a series of leadership competencies.

The LSP report lists your strengths and development opportunities based on your responses to the LSP. It also provides customized development feedback for each leadership competency.

The competencies listed in your report have been identified by Subject Matter Experts (SMEs) as important for success in your organization or role.

Strengths represent competencies where you excel because your personality or natural tendencies support your performance in these areas.

Development Opportunities should be considered relative to your strengths and represent competencies that show readiness for development.

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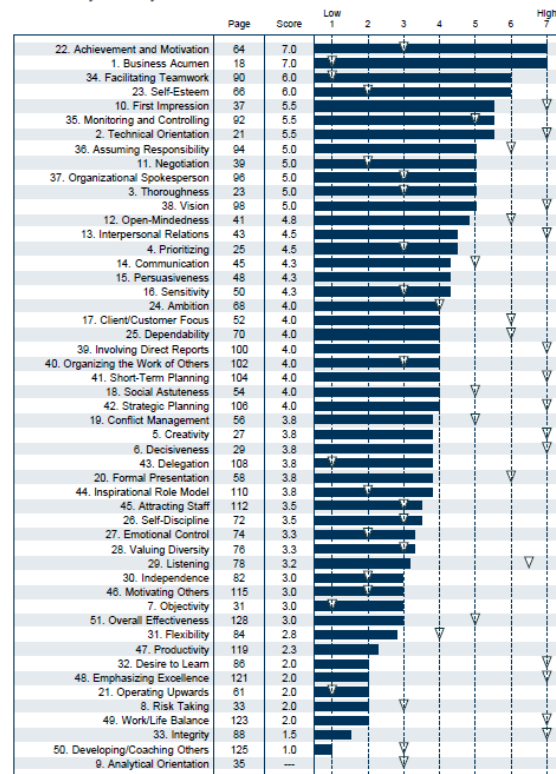
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