



Evalex35 Summary Report

→ James Jameson
XYZ Food

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Assessment Details

Last Name	Jameson
First Names	James
Gender	Male
Age	38
Home Language	English
English	1st language
Highest Qualification	Degree or 3 year Diploma
Company Assessed For	XYZ Food
Position Assessed For	Partner
Current Company	KPMG
Current Position	Senior Manager
Position Level	Senior Management
Position Type	Consulting
SST Level	Middle Management (30)
Date Assessed	1 November 2014
Age at time of assessment	34
Histogram	Global

Introduction

James completed the Evalex Leadership Assessment process on 01 Nov 2014.

The Evalex Leadership Framework maintains that high impact corporate leaders need to deal with a defined range of critical situations on a daily basis. In dealing with these they manifest a style of behaviour and thought process that provides leadership to others.

During the assessment James was required to deal with these simulated management situations and case studies, carefully developed to emulate the real critical situations we as managers need to deal with on a daily basis.

Under controlled conditions, James had to deal with the situations presented and the assessment responses were analysed according to defined interpretation guidelines and then compared with a database of managers across multiple organisation levels of management and across most industries.

In the summary that will follow, performance during the assessment will be benchmarked against managers performing at the same level as the position James is being considered for. An indication is given on whether the performance was significantly below, slightly below, meets or exceeds benchmarks in Managerial Competence, Strategic Thinking, Cognitive Capacity, Emotional Maturity, Personality, Values, Styles and Interests.

Our research indicates a very strong relationship between the scores achieved in the Evalex Leadership Assessment and successful performance at a given position level.

It is critical to remember that you as an organisation need to make your own final decision. We can simply reflect the nature of the candidate's characteristics for you to use with other information in forming an overall opinion.

It is further important to note that the benchmarking information below is in comparison to the position James was compared against, as communicated by you to us. The conclusions could be materially different, should we have compared the candidate against another role.

Recommendation & Feedback



Recommended - exceptional fit

80% probability of success. Likely to require little to no management support and development for target role.

Leadership Competence



Exceeds Benchmark for Position.

Thought Leadership



Exceeds Benchmark for Position.

Emotional Maturity



Meets Benchmark for Position.

Cognitive Ability



Exceeds Benchmark for Position.

Personality



Slightly Below Benchmark for Position.

Interests



Meets Benchmark for Position.

Notes

Strengths

Areas of Concern/Development

Problem solving behaviour
Cruising: Low sense of urgency, low need for challenge.
Low need to understand coupled with low resourcer style.

MANAGEMENT OVERVIEW OF COMPETENCIES

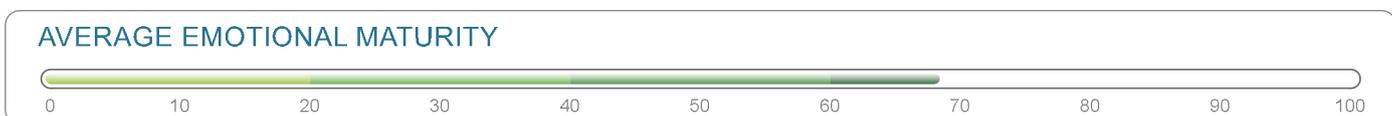
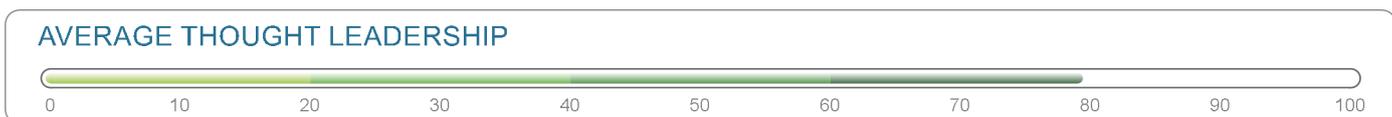
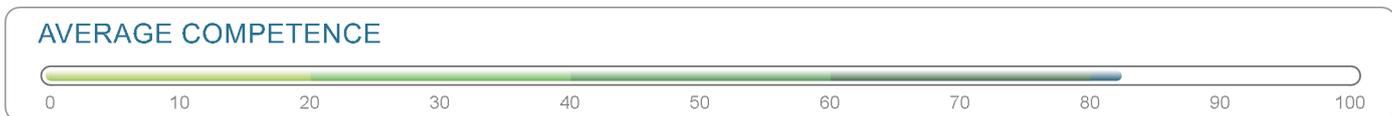
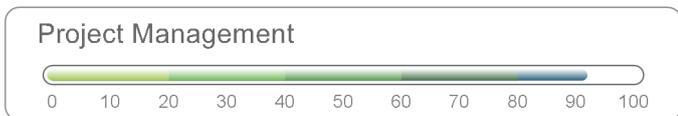
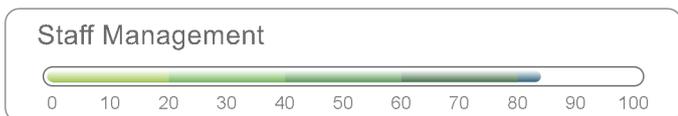
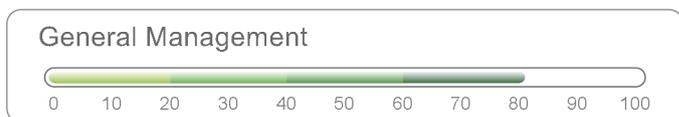
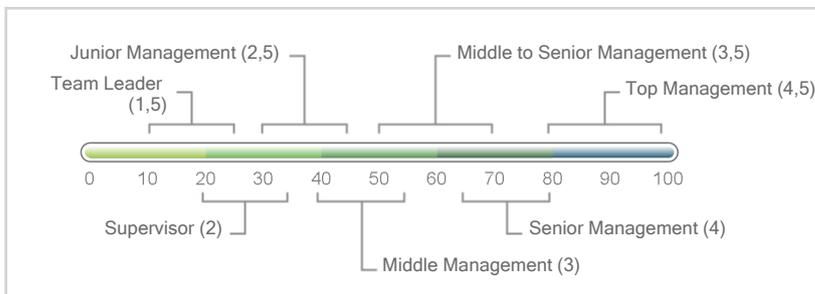
This page serves as a high level summary of the key management situations (the first set of bars) and averages (the second set of bars).

The candidate's performance in the management situations is shown first, followed by a weighted average of the Competencies, Strategic Capacity and Emotional Maturity. The value for each indicates this candidates performance benchmarked against an international population of 9,000 managers.

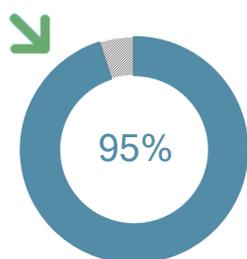
Strategic Capacity and Emotional Maturity are both averages of sub-dimension performance across all the management situations. For each of these a drill down is provided on the following pages.

The interpretation of these performance scores must be moderated by the candidates Personality, preferred Management Style, Values and Interest (presented later on in this report).

Research has indicated benchmarks, as set out in the adjacent chart, for the interpretation of Average Competence, Strategic Capacity and Emotional Maturity (Stratified Systems or Levels of Work in brackets):

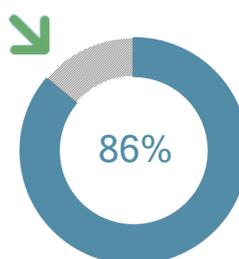


Assessment Summary



Overall Cognitive Capacity

In line with Executive roles.



Overall Business Knowledge

In line with Executive roles.

Ideal Position types:

James is best suited to the following types of roles. Please note that this profile does not take into account any prior experience or technical competencies. As an example, it is possible that the profile may show a good fit to a senior position, but the candidate does not have the experience or managerial competence for this role. This indicates only possible future development into these types of roles.

Archetype	Score	Description
Coach	63	Involves mentoring and coaching of others, shifting and developing attitudes, mind-sets and behaviour.
Operations Executive	50	Involves performance managing an operational process at an executive level to deliver defined outputs; taking control of an operation, managing a large staff compliment, integration of multiple resources.
Operations Supervisor	49	Involves managing a small team of process transactors, ensuring productivity and performance of a key operational process at a transactional level.
Branch Manager	49	Involves managing delivery of the organisation's products or services through one outlet or branch; integrating client expectations, staff, process and facilities to deliver defined outputs.

Performance inhibitors:

James's performance can be inhibited by the following key behavioural inhibitors, which may lead to failure in a role.

Inhibitor	Description
Cruising	Generally Initiators, such as this individual, are very good at shaping and transforming their environment. They are good at getting things going and are often quite successful. While this individual is an Initiator, they also have the tendency to take their foot off the pedal once they believe a comfortable pace has been set. They will carefully measure their pace and often do just enough to make sure that performance does not drop. They will still perform, but can do more. They often require an external injection to jolt them back into a more ferocious pace.

Preferred work sets:

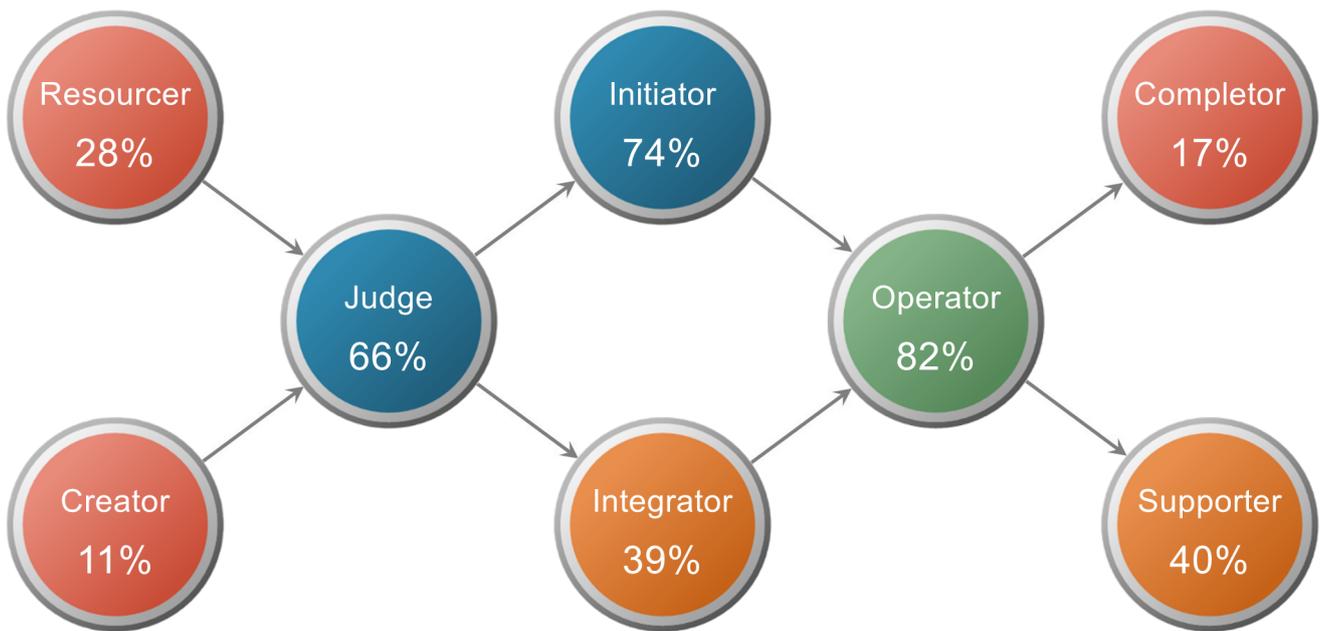
James is interested in the following activities. These should be aligned to the role.

Style	Score	Description
Counselling & Advising	98	Is interested in activities such as: Talking/counselling/helping people with their problems, giving advice, changing attitudes, deciding on a course of action.
Organising & Planning	83	Is interested in activities such as: Developing a project plan, Breaking a big job or project down into all the tasks to be performed; Discussing with staff what they have to do; Monitoring what staff are doing; Organising a group of people to get a project underway; Evaluating the progress of a work-team's activities.
Selling & Negotiating	74	Is interested in activities such as: Visiting clients to obtain new business; Talking to clients about their needs; Negotiating a price with a customer; Negotiating terms with a supplier; Presenting the features and benefits of products or services to clients; Talking to customers about the problems they experience with the company's products and services.
Stock Control & Distributing	61	Is interested in activities such as: Controlling stock (products, documents, stationary, vouchers, orders); Reconciling client orders to stock issued; Scheduling and organising the delivery of a product, document or equipment. Receiving goods from a supplier.
Data Capturing & Archiving	60	Is interested in activities such as: Reading information and punching it into a computer; Keeping, filing and retrieving records or documents.

Preferred work style:

James prefers the following styles. These should be aligned to the job requirements.

Style	Score	Description
Organising and Coordinating	82	Those who score high on this dimension indicate their strong preference for this Style of work. They are best deployed in roles where "on-the-ground" management and supervision is required. People who prefer the Style of Operating and Coordinating are often very hands-on leaders who do well in structured and operational environments where they can implement plans and make them work. They tend to actively plan, structure and organise important tasks for their teams and then closely monitor and ensure implementation of milestones and deadlines. They are often practical, structured, organised and diligent and keep an eye on their resources. Furthermore, they spend a lot of their time coordinating people and tasks and are quick to spot operational constraints or bottlenecks.
Initiating and Shaping	74	High scoring individuals are best deployed in roles where taking charge of a specific function, process or project is required or where a business unit, department, function or operation needs to be transformed and shaped. People who score high on this Style tend to be quick to seize opportunities and then initiate action and get the ball rolling. They are results orientated and are therefore quick off the mark, they shape and transform situations, and when progress is not being made they come through strongly to take the initiative. Furthermore they tend to have a strong influence on people and situations and easily assume leadership responsibilities. On the negative side, they can sometimes be quite impatient or impulsive and often run so quickly that they leave others behind.
Evaluating and Analysing	66	Team members scoring high on this Style have a strong preference for evaluating, analysing and judging. They are often consulted about matters because of their objective and analytical approach; they tend to weigh up the pro's and con's of issues factually and unemotionally. When solving problems they tend to ask probing questions and are rational, factual and logical. They critically evaluate ideas and arguments, are quick to see flaws and then counter them. Furthermore, they like to have a lot of information at their disposal before they will make decisions; this is mainly due to the fact that they are not rash but contemplative and like to think carefully about an issue. When the score is very high, it is possible that they are sometimes too rational and analytical and others may perceive them to be over-critical. Furthermore, it is possible they sometimes over-analyse which may lead to procrastination.

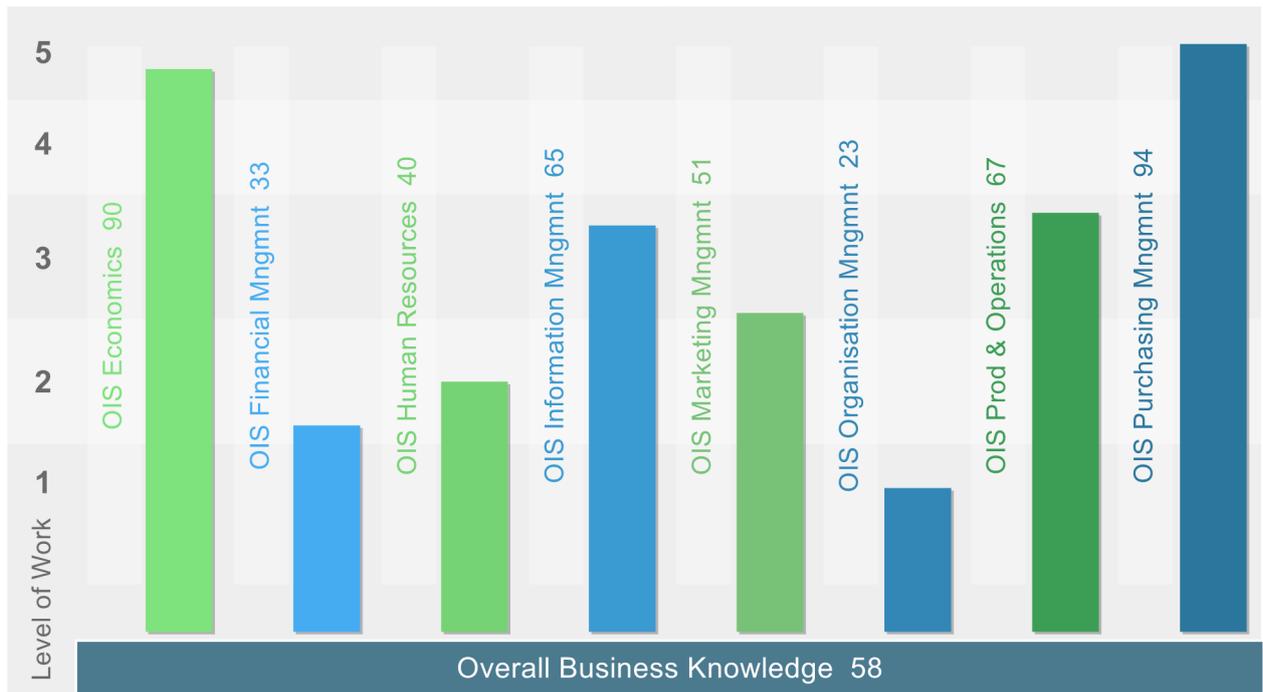


Cognitive Profile

Cognitive Capacity



Business Acumen



Archetypes: Introduction

EvaleX Intellectual Capital Management has done extensive research into the types of positions that exist within organisations. When the nature of work was considered and analysed across the boundaries of business function, work level, type of organisation and country, a number of "Archetypes" were identified. These Archetypes exist irrespective or independent to business function, organisation type, Industry or country of operation.

An Archetype implies a pattern of behaviour that can serve as a prototype to understand the position and the nature of a position. These Archetypes were defined based on the regularity with which they were observed within business organisations.

The use of Archetypes to illuminate personality was advanced by Carl Jung, a Swiss Psychiatrist, one of the most influential thinkers of the 20th century, in terms of human psychology. Jung suggested the existence of recognisable and typical patterns of behaviour with certain probable outcomes.

Applied to the modern day organisation, every position can be aligned to an Archetype, or typical framework of behaviour required from the incumbent to be successful.

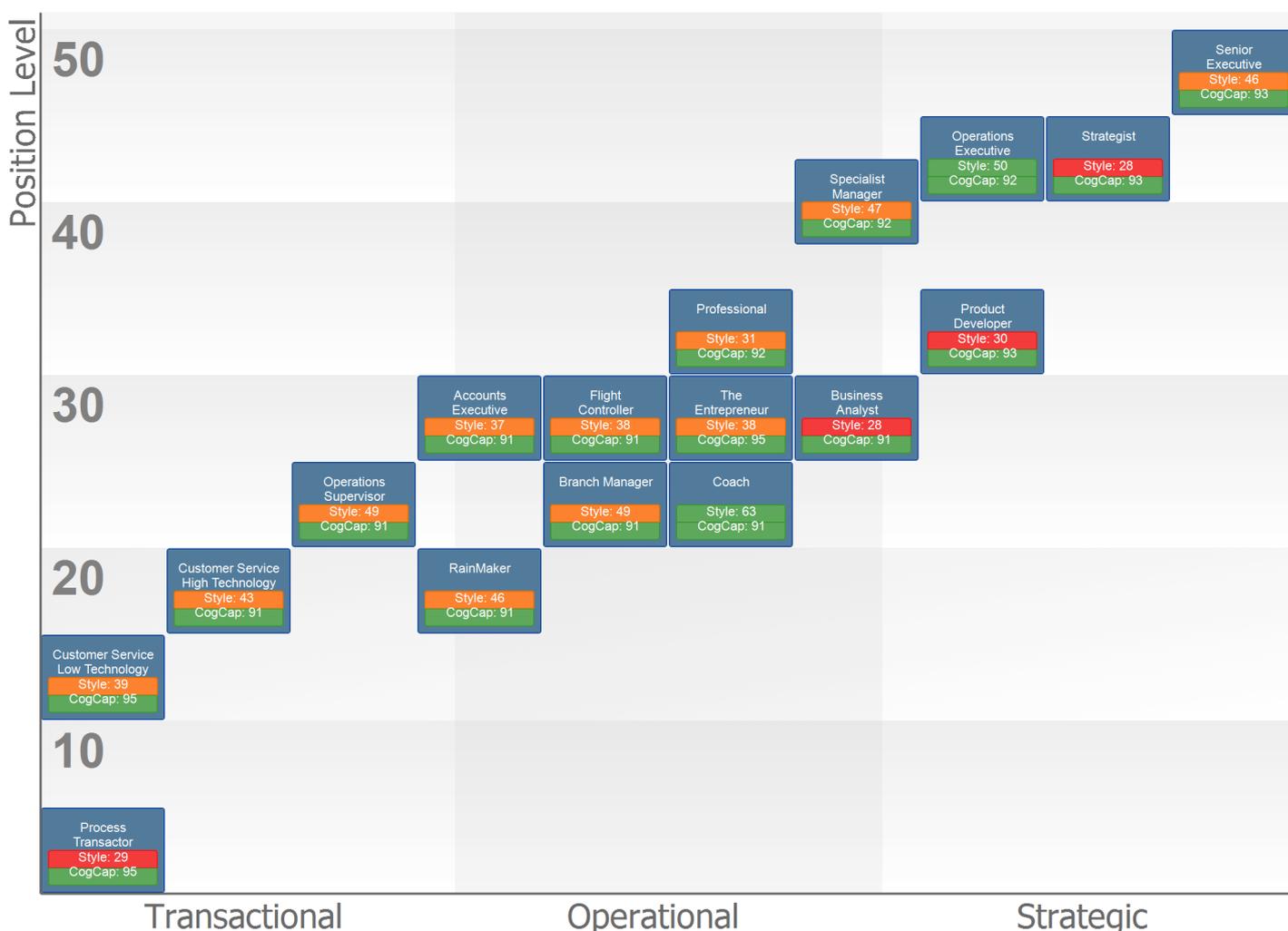
The Archetypes identified can be distributed across a continuum on two different constructs. The first is "Level of Work" a construct identified by Elliot Jacques from Brunel University; a term used within his broader "Stratified Systems Theory". An Archetype can therefore manifest and be observed at specific job levels. The second construct distributes the Archetypes across a scale from "transactional" through to "operational" through to "strategic". This may in some way duplicate aspects of the Levels of Work concept, but does add another interesting aspect that will become apparent when looking at the results of an assessment.

Each Archetype has as nucleus a certain "Style" and a certain level of "Cognitive Capacity".

Style refers to a constellation of personality traits, work styles, values and interests required to exhibit the pattern of behaviour dictated by the Archetype.

Cognitive Capacity implies that some Archetypes are more complex and require from the incumbent a higher level of cognitive functioning to deal effectively with the complexity.

Archetypes: Potential



Archetypes: Position Descriptions

Process Transactor

Involves execution or transacting of specific tasks along a clearly defined process, with no opportunity to delegate; personally responsible for quality and timeous completion.

Customer Service: Low Technology

Involves direct interface with clients, providing product information (features and benefits), assisting with client decision-making, finalisation of sales at point of sale. (Low technology as in a shop)

Customer Service: High Technology

Involves direct interface with clients, providing product information (features and benefits of products), assisting with client decision making, finalisation of client transaction within a operations system. (High technology as in a call centre)

RainMaker

A sales role; Involves development of leads, cold calling, selling of products or services to clients.

Operations Supervisor

Involves managing a small team of process transactors, ensuring productivity and performance of a key operational process at a transactional level.

Branch Manager

Involves managing delivery of the organisation's products or services through one outlet or branch; integrating client expectations, staff, process and facilities to deliver defined outputs.

Coach

Involves mentoring and coaching of others, shifting and developing attitudes, mind-sets and behaviour.

Accounts Executive

Involves management of a portfolio of key clients. Analysis of needs, matching of products and services to needs, resolving delivery and operational issues, maintaining and extending sales.

Flight Controller

Involves monitoring activities of multiple role players, scheduling activities, tracking progress, reporting on activities and integration to optimise resources vs. delivery. Takes overall accountability with little line function.

The Entrepreneur

Involves identifying an opportunity, conceptualising how it will work, selling the concept and implementing the solution.

Business Analyst

Involves analysing operational performance metrics, assessing reasons for over/under performance and designing process innovations to improve performance; may involve competitor and best practice analysis.

Product Developer

Involves analysis of market, product offerings, competitors, own organisational product performance and then design of new products to fill market gaps and extend competitive differentiation.

Professional

Involves the assessment of a particular situation or problem along a defined (often professional) framework, and the execution of activities according to a defined process; usually knowledge intense and seldom delegated with no line function.

Operations Executive

Involves performance managing an operational process at an executive level to deliver defined outputs; taking control of an operation, managing a large staff compliment, integration of multiple resources.

Specialist Manager

Involves the assessment of a particular situation or problem along a defined (often specialised) framework, and the execution of activities according to a defined process; usually knowledge intense and manages a small team of professionals.

Strategist

Involves contemplating existing business models, processes, approaches, articulating their strengths and weaknesses and proposing alternatives based on environmental scanning, competitor and best practice analysis.

Senior Executive

Involves the integration of multiple core processes into an operational unit, delivering a product or service to the market, growing revenue, profits and competitive edge, positioning of the business in relation to market segments and competitors, acquisition and allocation of resources.