From Data to Insights:

What Every L&D Professional Should Know About the Value of Using Assessments

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Credit Union National Association
CUNA®

Pleased to meet you!

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ASPIRE TALENT
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ASPIRE TALENT
GROUP LLC

Leadership & Employee Development Workshops
Coaching/Consulting
Assessments/Diagnostics
Teambuilding/Team Development
Culture, Engagement, Retention
Talent Strategy/HR Optimization
Online Learning Development

We use data and a scientific approach to talent optimization to help individuals, teams, and organizations *achieve more*.

Session Agenda

- Discuss various categories of professional workplace assessments
- Identify the appropriate use cases for different types of assessments and diagnostic tools
- Review sample assessment reports and the insights that can be gained
- Point you to a free assessment and resources you can immediately use and apply
- Provide you with the information you need to start selecting and using these powerful tools to accelerate individual and team development

Session Logistics
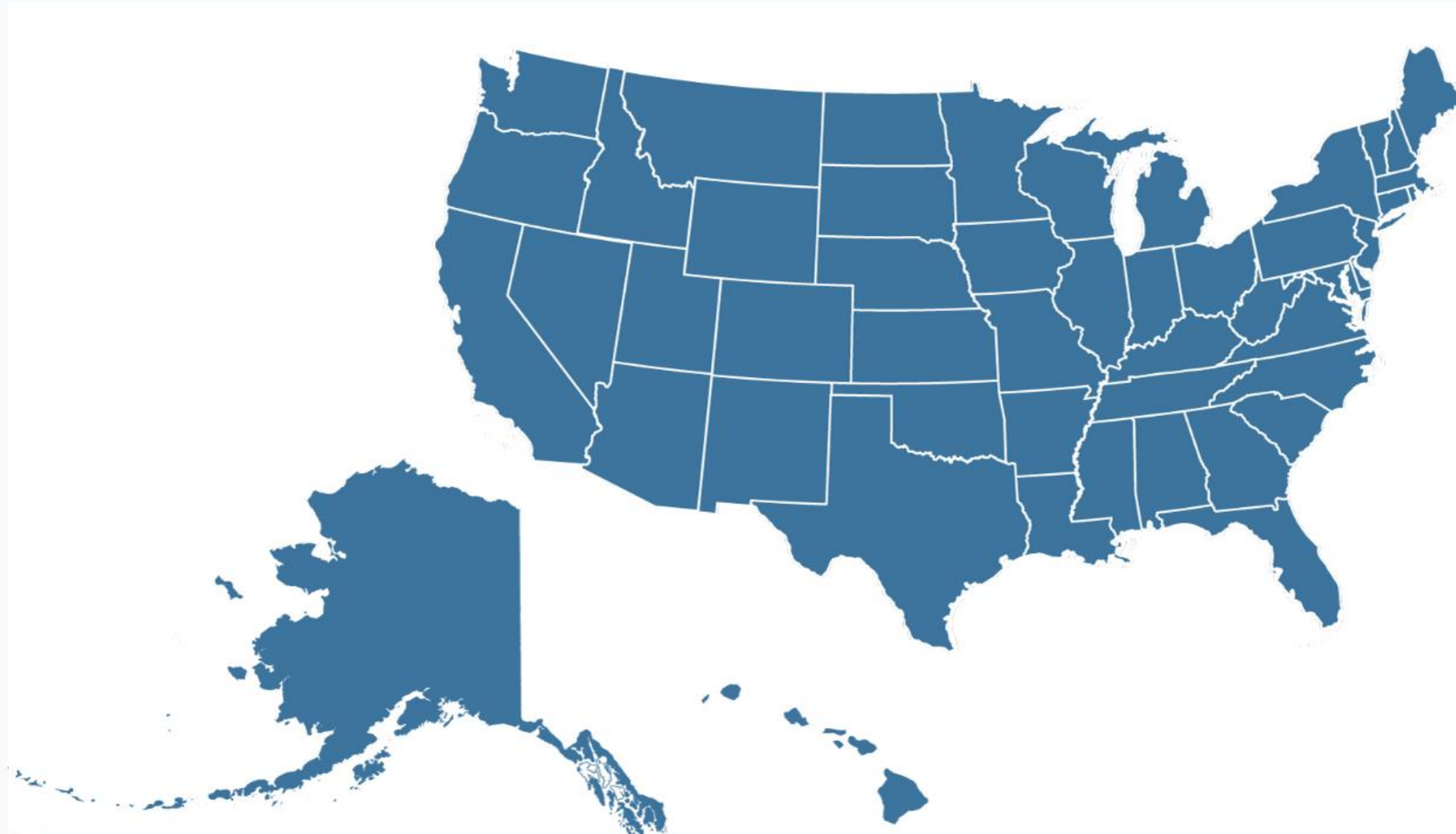
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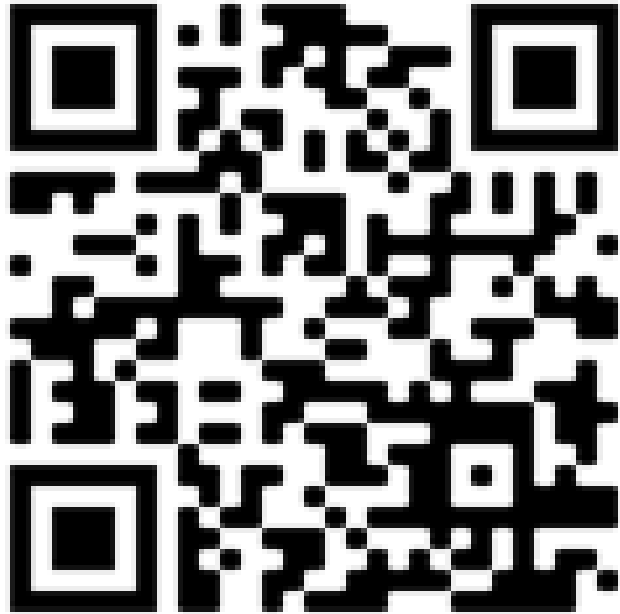
QR Code Reader

See link in Chat box

Go to
"pollev.com/tracynelson536"

Where are you joining us from?

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What are Psychometric Assessments/Diagnostics?

Scientifically-derived, evidence-based tools that provide metrics related to behaviors and psychological characteristics.

Types of Assessments/Common Uses

Individual Assessments
Candidate selection/hiring, work styles, communication preferences, 360's, specific competencies and capabilities, motivations, drivers, etc.

Team Assessments
Work styles, specific competencies and capabilities, culture and dynamics, team effectiveness

Organizational
Culture, engagement, effectiveness

Assessments can be used to measure...

- Personality styles
- Communication styles & preferences
- Motivations
- Resilience factors
- Modes of thinking
- Competencies/capabilities
- And much more!

What to consider when assessing assessments for your credit union talent development needs...

Validity

- Does it provide an accurate measurement of X?
- Does it do what it says it does?

Reliability

- Does it provide the same results over time?
- It is consistent?

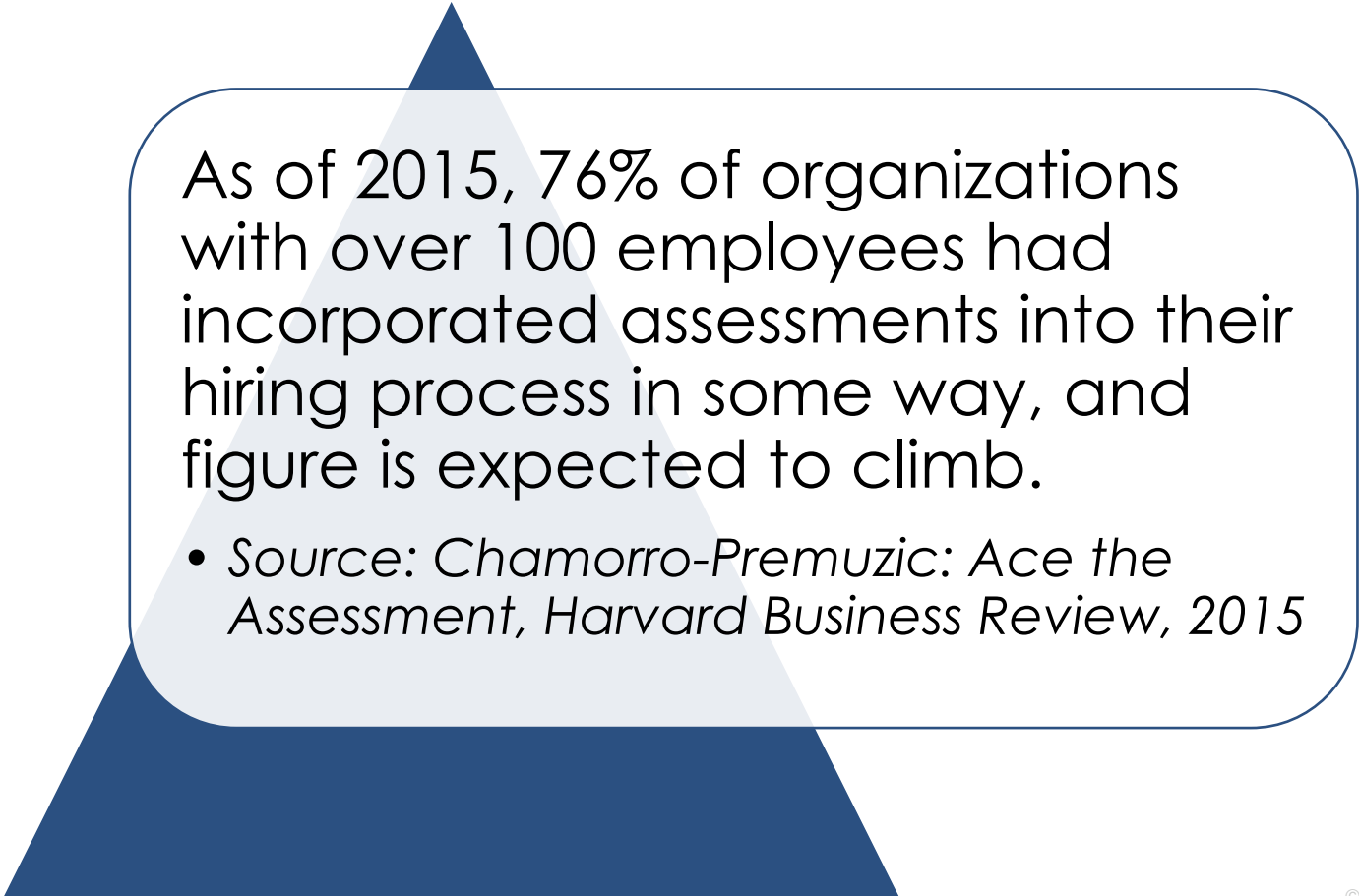# Benefits/Pros of Using Assessments as part of your L&D Toolbox

- Provides a framework to analyze/discuss individual, team, and organizational effectiveness

- Creates a set benchmarks for measuring and re-measuring individual, team, and organizational performance

- Mitigates subjectivity/bias and provides a common basis of measurement

- Drives a focus on measurable outcomes

- Allows actions and decision-making to be made around data vs. intuition

- Creates efficiencies via better targeted efforts and use of resources

Example: Creating targeted leadership development strategy

Completion of leadership 360 assessments for all frontline leaders to identify key strengths and development opportunities. Results used to determine:

- Design of frontline leader development training program focused on key areas of needed competency and capabilities
- Individual development plans for frontline leaders tailored toward addressing their specific development opportunities
- Ability to re-measure to assess progress and evolve ongoing leadership development strategy

Who is using assessments in the workplace?

As of 2015, 76% of organizations with over 100 employees had incorporated assessments into their hiring process in some way, and figure is expected to climb.

- *Source: Chamorro-Premuzic: Ace the Assessment, Harvard Business Review, 2015*

Is your credit union using any assessments or diagnostics for individual or team development?

Yes **A**

No **B**

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Putting together the right assessment toolbox for individual development

Individual Assessments for Leadership & Professional Development
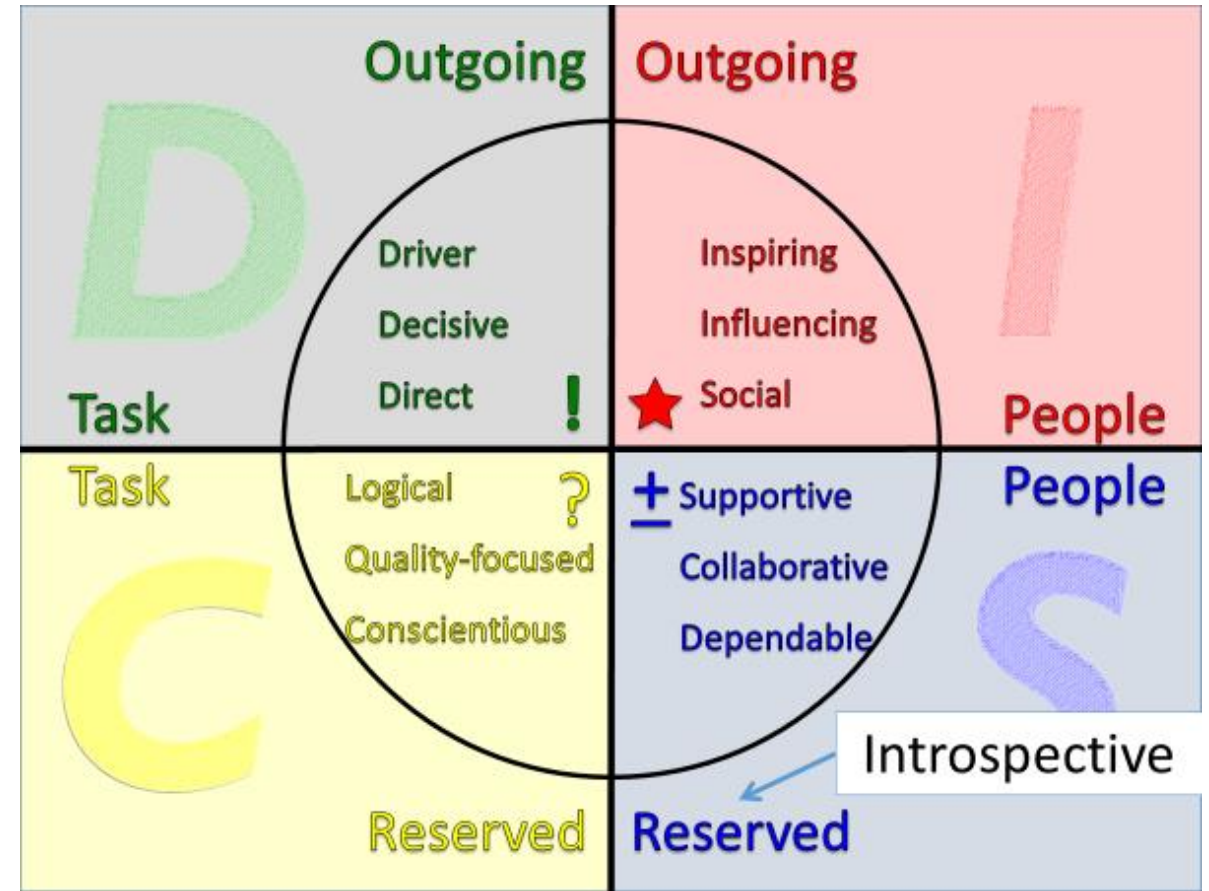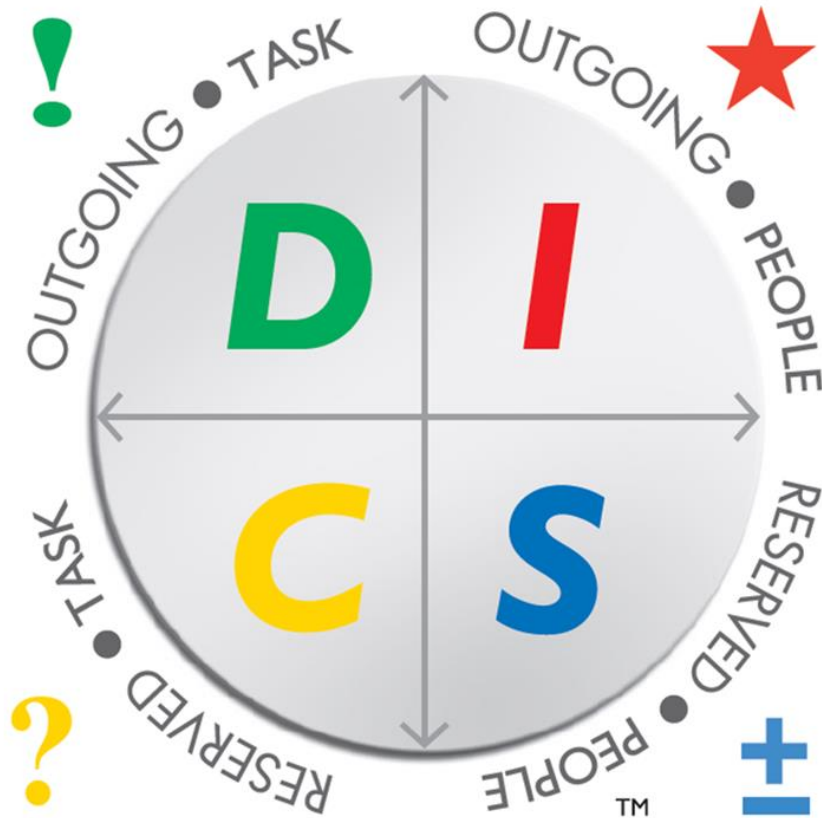
Styles:

DiSC, MBTI

360's:

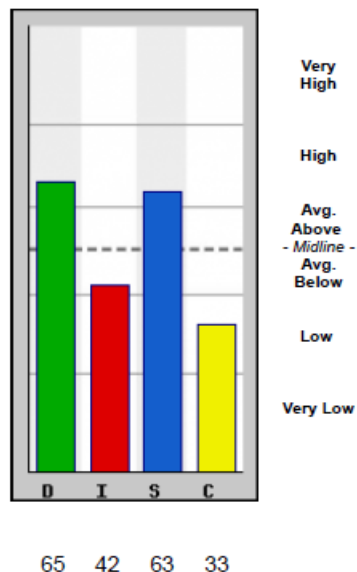Center for Creative Leadership Benchmarks for Managers, Human Synergistics Manager Impact
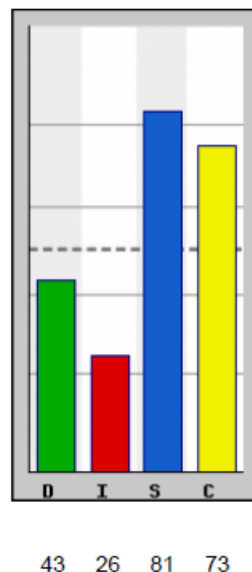
Specialized competencies/capabilities:
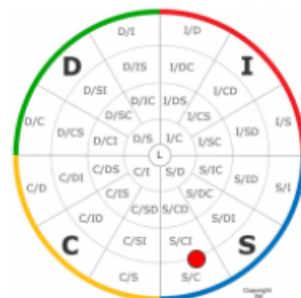
EQi 2.0 and more…

Individual/Leadership Styles - DiSC

Left Panel

Environment Graph (How People See You)	Basic Graph (The Real You)	Circle Graph (Basic at-a-glance)

	Very High
	High
	Avg. Above - Midline - Avg. Below
	Low
	Very Low

Environment Graph values: D I S C → 65 42 63 33

Basic Graph values: D I S C → 43 26 81 73

Circle Graph: Blend = S/C

Overview of Your Graphs

The bar graphs above show levels for your D, I, S and C personality traits. The higher the level of the trait, the stronger it is. The graph on the left is called **Your Environment Graph** which shows how people see you. It shows how you tend to act with other people in your environment. The graph in the center is called **Your Basic Graph.** This graph reflects how you see yourself. It shows how you are most comfortable acting (the real you). **Your Basic Graph in the center was used to** determine your personality blend as being **S/C.** The graph on the right is called your Circle Graph and is an at-a-glance view of your Basic Graph. Keep in mind that **behavior in your environment is often different than your real personality preferences.** This report can give you insights into the dynamics of your personality style. You may exhibit very different personality traits in different situations. That is normal. **As you learn to see the patterns in your behavior, you will be able to interact more effectively with others.**

Right Panel

Ashley as a Team Member

Ashley's Main Strength:

You are great at being consistent and supportive of others with sincerity, care and quality work.

Main Motivation: Deliberate, conservative pace in a specialized, supportive role

Individual Talents and Gifts: Dependable, loyal, specialized follow-through skills

Value as a Team Member: Excellent team player; finds agreement between opposing views

Ideal Environment: Specialized assignments; stability, predictability, no surprises

Key to Motivate: Time to adjust to change; written procedures; clear instructions in order to do their job right the first time; reassurance their work is being done correctly; predictable work environment with few surprises; appreciation for loyalty and long service

Keys to Manage: While working with others: S/C style blends need a feeling of belonging to a team; understanding tasks in logical sequence; detailed instructions for complex assignments; support in high risk decisions; ways to avoid feeling pressure when saying no

How You Act Best Under Pressure (your perception): Dependable; easygoing; kindhearted; thoughtful; warm; team player

How Others *May* MISUNDERSTAND and MISREAD Your Actions Under Pressure (if they do not understand you): Detached; inflexible; insensitive; stubborn; hesitant; holds grudges

Things to be aware of (possible blind spots): Taking ownership of his or her skills and understanding the significance of his or her contributions

Complementary Personality Styles: D, D/I, I/D, D/IC

Myers Briggs Type Index (MBTI)

Your Myers-Briggs® Profile is designed to help you understand your results on the *Myers-Briggs Type Indicator®* (MBTI®) assessment. This assessment identifies which of 16 different personality types best describes you.

Your answers to the questions on the MBTI assessment show which preference in each of four pairs of opposites you favor. Your preferences are choices between equally valuable and useful qualities. Each preference is indicated by a letter.

Your Myers-Briggs personality type	Your preferences
ESTJ	Extraversion | Sensing | Thinking | Judging

THE WAY YOU DIRECT AND RECEIVE ENERGY

Extraversion
People who prefer Extraversion tend to direct their energy toward the outside world and get energized by interacting with people and taking action.

e | **i**

Introversion
People who prefer Introversion tend to direct their energy toward their inner world and get energized by reflecting on their ideas and experiences.

THE WAY YOU TAKE IN INFORMATION

Sensing
People who prefer Sensing tend to take in information that is real and tangible. They focus mainly on what they perceive using the five senses.

s | **n**

Intuition
People who prefer Intuition tend to take in information by seeing the big picture. They focus mainly on the patterns and interrelationships they perceive.

THE WAY YOU DECIDE AND COME TO CONCLUSIONS

Thinking
People who prefer Thinking typically base their decisions and conclusions on logic, with accuracy and objective truth the primary goals.

t | **f**

Feeling
People who prefer Feeling typically base their decisions and conclusions on personal and social values, with understanding and harmony the primary goals.

TYPE DESCRIPTION: ESTJ
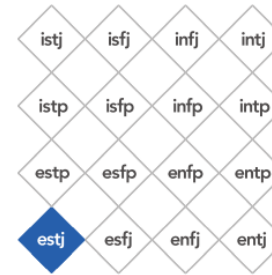
- Decisive, clear, assertive
- Logical, analytical, objectively critical
- Adept at organizing projects, procedures, and people
- Value competence, efficiency, and results
- Prefer proven systems and procedures
- Focus on the present; apply past experience to deal with problems
- Seen as conscientious, dependable, decisive, outspoken, self-confident

Some of these descriptors may not fit you because you are a unique person. Although most ESTJs have personality attributes in common, there are still plenty of individual differences among people who share the same four-letter type.

Your MBTI responses indicate not only your preferences, but also the probability that your reported preferences really do fit you. The graph below shows the probability index for each of your preferences. The closer the blue marker is to a preference, the greater the probability that the preference describes you well. The probability index does not measure how much of a preference you have or how well you use that preference. It simply shows how likely it is that the preference you reported is accurate for you.

PROBABILITY INDEX FOR EACH OF YOUR MBTI® PREFERENCES
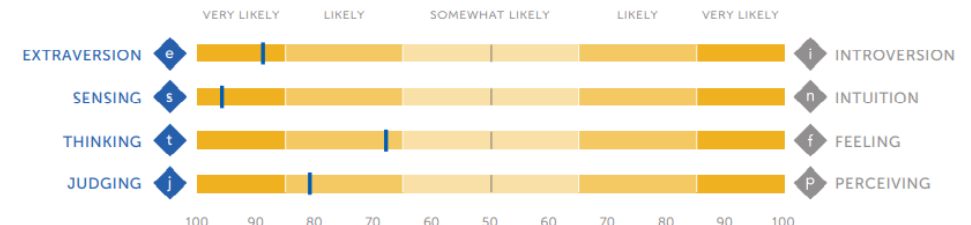
| PROBABILITY: | EXTRAVERSION \| 89 | SENSING \| 96 | THINKING \| 68 | JUDGING \| 81 |

Each of the Myers-Briggs types is characterized by its own interests, values, and unique gifts. Although each individual

INTERPRETIVE REPORT

mbti. MYERS-BRIGGS TYPE INDICATOR® | GLOBAL STEP II™

MARK SAMPLE

ESTJ | 9

Applying Step II™ Results to Communicating

All aspects of your type influence how you communicate, especially as part of a team. Eleven of the facets may be particularly relevant to communication. Your preferences for these facets along with tips for better communication appear below. Focus on those that are accurate and meaningful to you.

In addition to the tips in the table, keep in mind that communication for every type includes

- Telling others what kind of information you need.

- Asking others what they need.

- Monitoring your impatience when other styles dominate.

- Realizing that others likely are not trying to annoy you when they use their own communication styles.

YOUR FACET RESULT	COMMUNICATION STYLE	ENHANCING YOUR STYLE
Initiating–Receiving midzone	Are willing to introduce people to one another if no one else is doing so.	Be sensitive to the situation when deciding whether to make those introductions or not.
Expressive	Say what is on your mind to those present.	Recognize when it's important *not* to say what's on your mind and then don't say it.
Gregarious–Intimate midzone	How much you participate depends on how much group interaction you've already had.	When you know that you'll need to be in a large group, try to have fewer interactions overall that day.
Active	Like to communicate and interact with others face-to-face.	Recognize when face-to-face communication may be intrusive or unnecessary.
Enthusiastic	Readily show enthusiasm for the subject at hand.	Be careful not to overwhelm and override others; make sure you ask for input.
Concrete–Abstract midzone	Talk about *some* of the facts and details as well as their meanings.	Be aware of when you are focusing on details and when on meanings and choose the focus that is better for the situation.
Logical–Empathetic midzone	May sometimes present in a straightforward manner; at other times, tactfully circle around the issue.	Decide which one is likely to be more effective in that situation.
Questioning– Accommodating	Ask some questions comfortably as long as you believe that this won't stop the discussion.	Choose carefully when you need to agree or when you need to ask questions.

Individual Leadership 360 Assessments:

What are they?

- Multi-rater assessments, i.e. ratings on various leadership competencies completed by self, peers, direct reports, supervisor/other senior leaders, etc.

What are the specific benefits?

- Identify leadership strengths and development opportunities based on a defined set of leadership competencies
- Clearly see gaps in self-perception vs. perception of others
- Can be used for better targeted leadership development, i.e. IDP

Individual/Leadership 360's – CCL Benchmarks for Managers

Pat Sample

Section 1: Leadership Competencies - Overview Charts

Importance for Success and Average Scores

Competency	Importance for Success			Average Scores	
	All Raters	Boss	Self	All Raters	Self
Leading the Organization					
1. Strategic perspective	8	1	1	4.00	3.63
2. Being a quick study	4	1		3.65	2.67
3. Decisiveness	6	1	1	3.96	4.00
4. Change management	7	1		3.94	3.78
Leading Others					
5. Leading employees	8	1	1	3.94	3.23
6. Confronting problem employees	3	1		3.63	3.67
7. Participative management	5		1	[4.08]	4.00
8. Building collaborative relationships	7		1	3.97	3.71
9. Compassion and sensitivity	4			[4.06]	3.17
10. Putting people at ease	5			[4.60]	4.00
11. Respect for differences	2	1		[4.73]	4.50
Leading Yourself					
12. Taking initiative	4		1	3.90	3.80
13. Composure	6		1	3.95	4.00
14. Balance between personal and work life	5	1		[4.48]	4.67
15. Self-awareness	3		1	[4.03]	3.50
16. Career management	3			3.90	3.00

Norm Group Comparisons: Self and All Raters
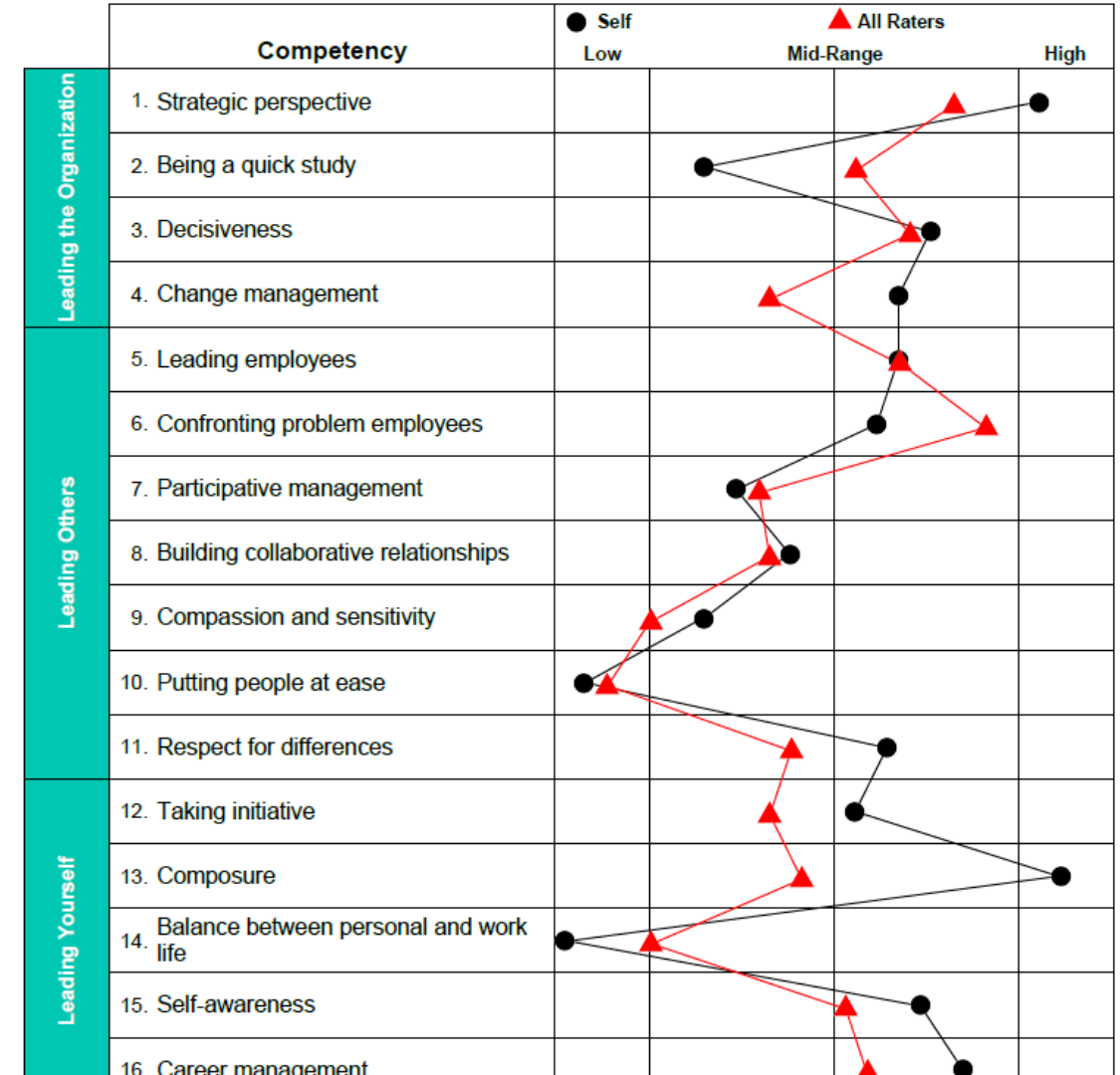
Norm Group Comparisons: By Rater Group

Legend:
- ● Self
- ★ Boss
- ◆ Peers
- ▼ Superior
- ■ Direct Reports

	Competency	Low	Mid-Range	High
Leading the Organization	1. Strategic perspective			
	2. Being a quick study			
	3. Decisiveness			
	4. Change management			
Leading Others	5. Leading employees			
	6. Confronting problem employees			
	7. Participative management			
	8. Building collaborative relationships			
	9. Compassion and sensitivity			
	10. Putting people at ease			
	11. Respect for differences			
Leading Yourself	12. Taking initiative			
	13. Composure			
	14. Balance between personal and work life			
	15. Self-awareness			
	16. Career management			

Section 1: Leadership Competencies - Comprehensive Data

5. Leading employees - Attracts, motivates, and develops employees.

	Importance	Scores	Low		Mid-Range		High
Self	1	4.08				●	
All Raters	6	4.03				▲	
Boss	1	3.46		★			
Superior		3.62			▼		
Peers		4.13				◆	
Direct Reports		4.19				■	
Others		--					

		Self	Boss	Superior	Peers	Direct Reports	Others
24.	Is willing to delegate important tasks, not just things he/she doesn't want to do.	5.00	4.00	[4.00]	4.33	4.50	--
25.	Provides prompt feedback, both positive and negative.	4.00	3.00	[4.00]	4.33	4.50	--
26.	Pushes decision making to the lowest appropriate level and develops employees' confidence in their ability to make those decisions.	3.00	4.00	[4.00]	4.33	4.00	--
27.	Acts fairly and does not play favorites.	4.00	4.00	[4.00]	4.67	4.00	--
28.	Uses his/her knowledge base to broaden the range of problem-solving options for direct reports to take.	4.00	4.00	[4.00]	4.67	4.50	--
29.	In implementing a change, explains, answers questions, and patiently listens to concerns.	3.00	3.00	3.00	3.33	4.00	--
30.	Interacts with staff in a way that results in the staff feeling motivated.	4.00	4.00	3.00	3.00	3.25	--
31.	Actively promotes his/her direct reports to senior management.	5.00	3.00	3.00	4.00	4.50	--
32.	Develops employees by providing challenge and opportunity.	4.00	4.00	[4.00]	4.33	4.50	--
33.	Sets a challenging climate to encourage individual growth.	5.00	3.00	[5.00]	4.00	4.00	--
34.	Rewards hard work and dedication to excellence.	4.00	3.00	[4.00]	4.67	4.00	--
35.	Surrounds him/herself with the best people.	4.00	3.00	3.00	4.00	4.50	--
36.	Finds and attracts highly talented and productive	4.00	3.00	2.00	4.00	4.25	

Human Synergistics Leadership Styles Inventory

Your Ideal Impact (N=1)

Your Current Impact HLM Sample (N = 1)

Your Current Impact Peer or Associate (N = 4)

Your Current Impact Direct Report (N = 4)
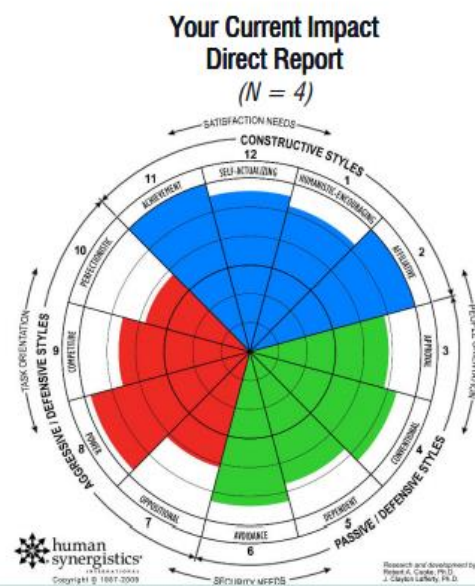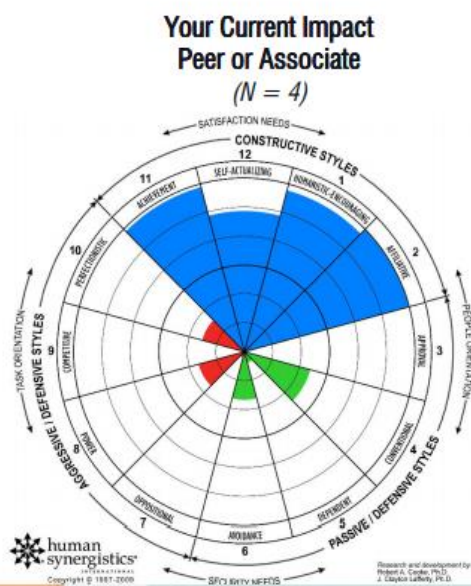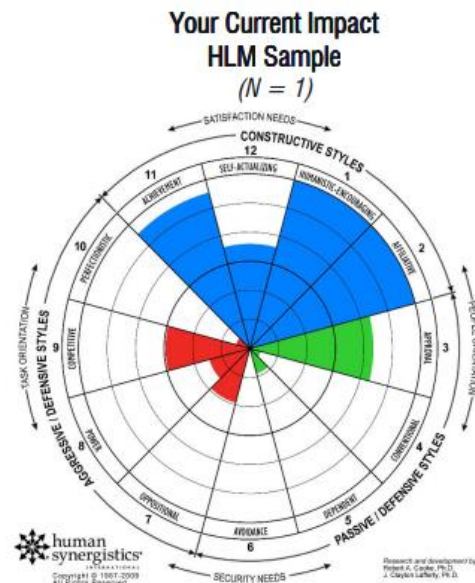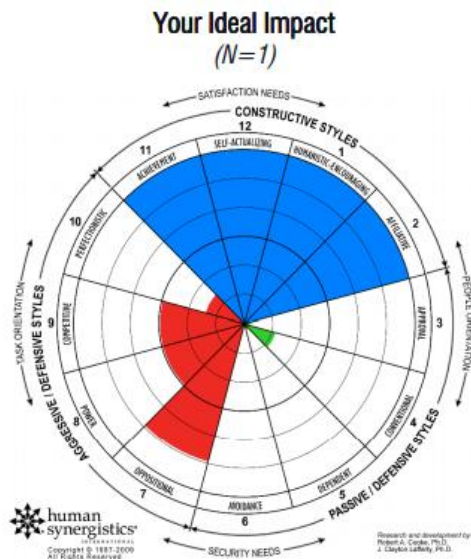
Extent to which you...	Your Current Impact	Your Ideal Impact	Gap
Approval			
expect people to "go along" with others	1.56	0.00	1.56
deter people from taking controversial or unpopular actions	1.11	0.00	1.11
encourage people to say what those around them **want** to hear (rather than what they **need** to hear)	0.67	0.00	0.67
lead people to rely on flattery and ingratiation to gain approval	0.44	0.00	0.44
make people feel they have to be accepted and part of the "in-group"	0.33	1.00	0.00
Conventional			
require people to strictly adhere to policies and standard operating procedures	3.00	2.00	1.00
cause people to focus on procedures rather than outcomes	2.00	1.00	1.00
require people to do things the way they've always been done	0.67	0.00	0.67
cause people to refer to rules and procedures to justify their actions	1.44	1.00	0.44
pressure people to accept the "status quo"	0.44	0.00	0.44
Dependent			
require people to follow orders, even if they have a better idea	1.22	0.00	1.22
expect people to simply do what they're told	1.11	0.00	1.11
prevent people from taking action until receiving all clearances and approvals	1.00	0.00	1.00
expect people to interrupt their work to respond to "shifting priorities" from above	1.78	1.00	0.78
require people to get permission before changing the way they spend their time	1.11	2.00	0.00
Avoidance			
lead people to withdraw from interpersonal conflicts and disagreements	2.22	0.00	2.22
discourage people from taking risks	1.33	0.00	1.33
cause people to stay away from difficult situations that could make them look bad	0.56	0.00	0.56
lead people to play it safe and wait for others to act first	0.44	0.00	0.44
make people feel apprehensive and insecure	0.33	1.00	0.00

Have you ever experienced a 360 assessment as part of your professional development?

Yes

No

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Cautions/suggestions for using 360 assessments effectively :

CAN RESULT IN FEEDBACK THAT IS VERY DIFFICULT TO HEAR

SHOULD NOT BE USED IN PLACE OF PERFORMANCE FEEDBACK TO DELIVER "BAD NEWS"

SHOULD ONLY BE USED FOR DEVELOPMENTAL PURPOSES & DEBRIEFED BY EXPERIENCED 360 ASSESSOR AND COACH

SHOULD BE A POSITIVE, SUPPORTIVE, AFFIRMING EXPERIENCE USED TO SUPPORT THE LEADER IN IDENTIFYING HOW TO LEVERAGE STRENGTHS AND ADDRESS DEVELOPMENT OPPORTUNITIES

CAN BE USED TO CREATE A TARGETED IDP (INDIVIDUAL DEVELOPMENT PLAN)

Individual/Leadership Specialized Capabilities – EQi 2.0

EQ-i 2.0 Model of Emotional Intelligence

SELF-PERCEPTION

Self-Regard is respecting oneself while understanding and accepting one's strengths and weaknesses. Self-Regard is often associated with feelings of inner strength and self-confidence.

Self-Actualization is the willingness to persistently try to improve oneself and engage in the pursuit of personally relevant and meaningful objectives that lead to a rich and enjoyable life.

Emotional Self-Awareness includes recognizing and understanding one's own emotions. This includes the ability to differentiate between subtleties in one's own emotions while understanding the cause of these emotions and the impact they have on one's own thoughts and actions and those of others.

STRESS MANAGEMENT

Flexibility is adapting emotions, thoughts and behaviors to unfamiliar, unpredictable, and dynamic circumstances or ideas.

Stress Tolerance involves coping with stressful or difficult situations and believing that one can manage or influence situations in a positive manner.

Optimism is an indicator of one's positive attitude and outlook on life. It involves remaining hopeful and resilient, despite occasional setbacks.
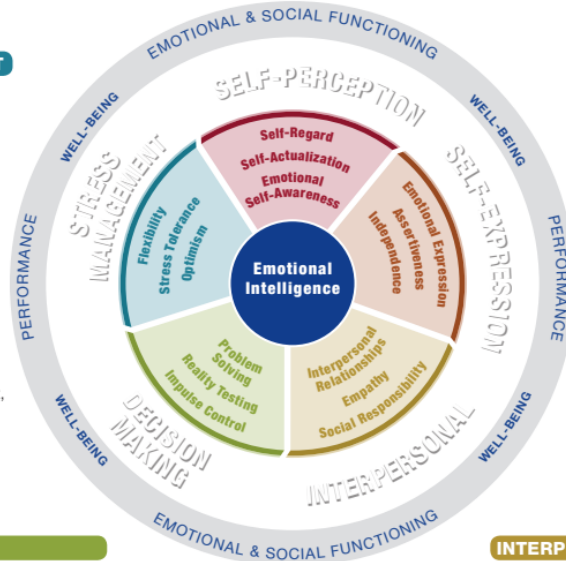
SELF-EXPRESSION

Emotional Expression is openly expressing one's feelings verbally and non-verbally.

Assertiveness involves communicating feelings, beliefs and thoughts openly, and defending personal rights and values in a socially acceptable, non-offensive, and non-destructive manner.

Independence is the ability to be self directed and free from emotional dependency on others. Decision-making, planning, and daily tasks are completed autonomously.

DECISION MAKING

Problem Solving is the ability to find solutions to problems in situations where emotions are involved. Problem solving includes the ability to understand...

INTERPERSONAL

Interpersonal Relationships refers to the skill of developing and maintaining mutually satisfying relationships that are characterized by trust and compassion...

Overview
Total EI — 123
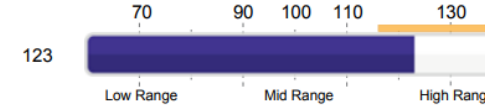
	Score
Self-Perception Composite	115
Self-Regard — Respecting oneself; Confidence	113
Self-Actualization — Pursuit of meaning; Self-improvement	114
Emotional Self-Awareness — Understanding own emotions	111
Self-Expression Composite	128
Emotional Expression — Constructive expression of emotions	123
Assertiveness — Communicating feelings, beliefs; Non-offensive	123
Independence — Self-directed; Free from emotional dependency	119
Interpersonal Composite	113
Interpersonal Relationships — Mutually satisfying relationships	111
Empathy — Understanding, appreciating how others feel	105
Social Responsibility — Social conciousness; Helpful	119
Decision Making Composite	125
Problem Solving — Find solutions when emotions are involved	125
Reality Testing — Objective; See things as they really are	114

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Emotional Self-Awareness

Understanding own emotions

EQ-i

70 90 100 110 130

111

Low Range   Mid Range   High Range

What Your Score Means

If you have a solid understanding of what brings about your emotions, it is much easier to regulate your behavior and control the impact your emotions have on employees in the organization. Ms. Sample, your result indicates that more than most people, you are conscious of your emotions and the impact they have on performance. You likely lead with composure and a full understanding of your impact on others. It is likely that you:

- Can choose a course of action based on a "gut feeling" in time-constrained situations.
- Generate respect, admiration, and honesty from employees because you are viewed as highly self-aware.
- Generally take time to contemplate instead of acting rashly, thereby considering your emotional response and those of others.

You scored well above average on Emotional Self-Awareness and fall within the leadership bar.
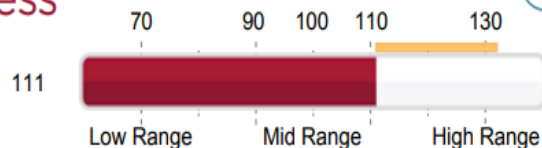
Leadership Impact

Authenticity   Coaching

Leadership Implications. As a leader, you have a thorough grasp of your emotional triggers and reactions. This in-depth understanding helps fuel a streamlined decision-making process as you incorporate your emotions into your role as a leader. Knowing your emotional triggers and reactions, you are able to utilize this emotional knowledge to effectively navigate through challenging or difficult situations.

Organizational Implications. Your capacity to grasp subtle emotional nuances helps you take calculated risks that help the organization meet its strategic goals. This comfort with, and knowledge of, your emotional triggers and reactions allows you to lead with authenticity and a candid approach to help you gain credibility and buy-in with employees. You are able to manage tense and perhaps overwhelming situations with ease, and you are able to use and recognize your full spectrum of emotions.

Strategies for Action

Be a Role Model. Through the steadfast control of your emotions, you can be innovative, successfully take risks, and gain the trust of your employees.

- The most prominent leaders have an aptitude for remaining composed in competitive situations and under mounting pressure and duress. Your ability to be aware of your emotions helps you to serve as a model of composure and ensures that employees feel secure and content to overcome any potential challenge.
- Give seminars/workshops or hire an expert to teach employees about understanding emotions and the impact of their emotions on others.

Weigh the Evidence. As you are highly adept at understanding your emotions, you may have a tendency to be overly reliant on your emotional barometer to make decisions. Be mindful to incorporate objective evidence.

- Intuition can only carry you so far. While a deal may feel right, data may not support the intended strategy. Be sure to seek counsel from colleagues, involve members of your team and emphasize facts to support your proposed course of action.

Action Plan

The steps you take towards achieving your EI goals will determine whether or not success is realized. Use this step-by-step activity plan to help guide you closer to your goals. Remember to use the **SMART** goal setting criteria for each goal.

S PECIFIC
M EASURABLE
A CTION-ORIENTED
R EALISTIC
T IMELY

Write down up to three EI skills or behaviors that you would like to further develop (e.g., "reflective listening" to build empathy, or "recognizing how my body reacts to stress" to raise emotional self-awareness). The **SMART** goals that you outline in the template should help to strengthen these EI skills and behaviors.

1.

2.

3.

Write down up to three overall qualities that you would like to have (e.g., integrity, providing clear leadership, team player, clear communicator). In some way the goals you outline in this action plan should help you achieve the overall qualities you identified.

1.

2.

3.

Transfer your **SMART** goals into the action plan template below.

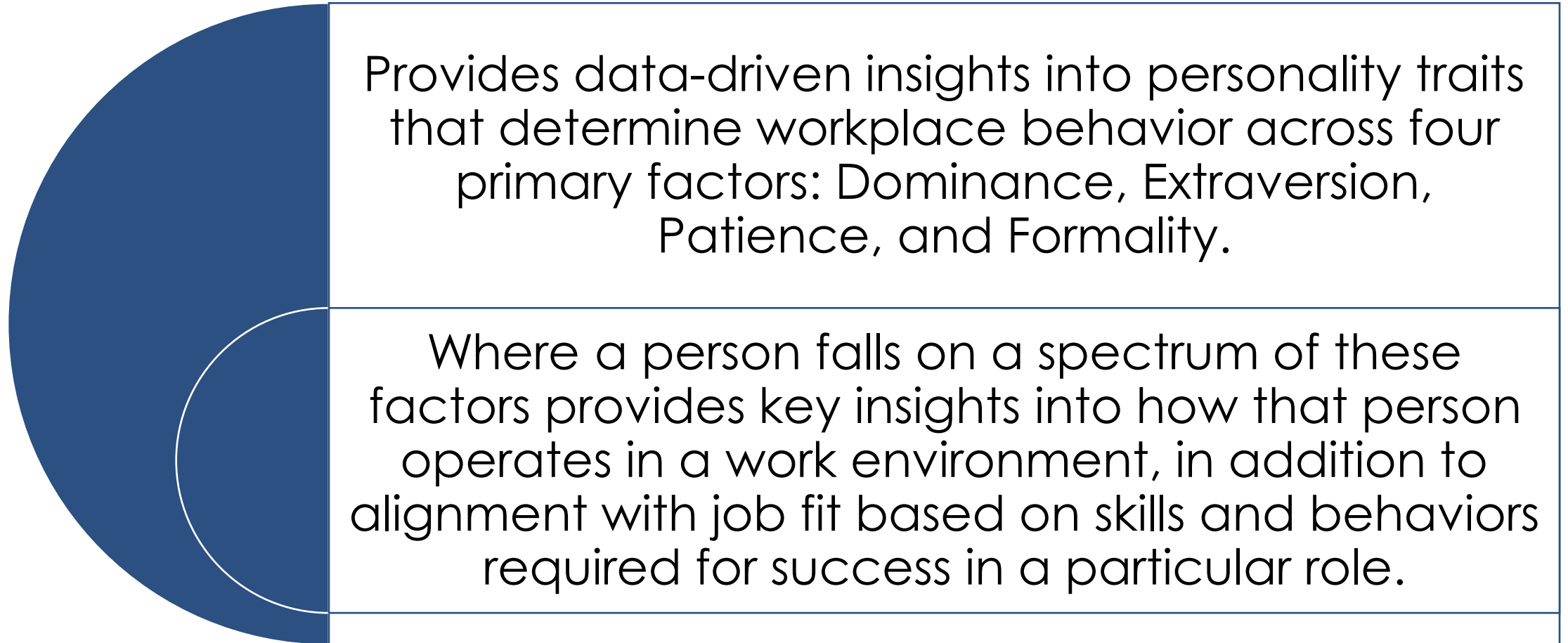| SMART Goal	Time Frame	Benefits	Measure of Success	Support and Resources Needed	Potential Barriers
Practice active listening	Today, especially in one on one meetings with my direct reports	Improved interpersonal relationships, empathy with my team. Increased employee engagement.	- Feedback - 360 results increase	Direct feedback from my team	Obtaining honest feedback can be difficult. Time – don't cancel one on one meetings – demonstrate the importance of regular touch points

Other Assessments for Specialized Styles/Capabilities

- Thomas Kilmann Conflict Style Inventory

- Change Styles Navigator

- HSI Stress Processing Report

- Perceptive Communications

- Customer Service Styles

See descriptions and sample reports at

aspiretalentgroup.com

Predictive Index (PI) Behavioral Assessment

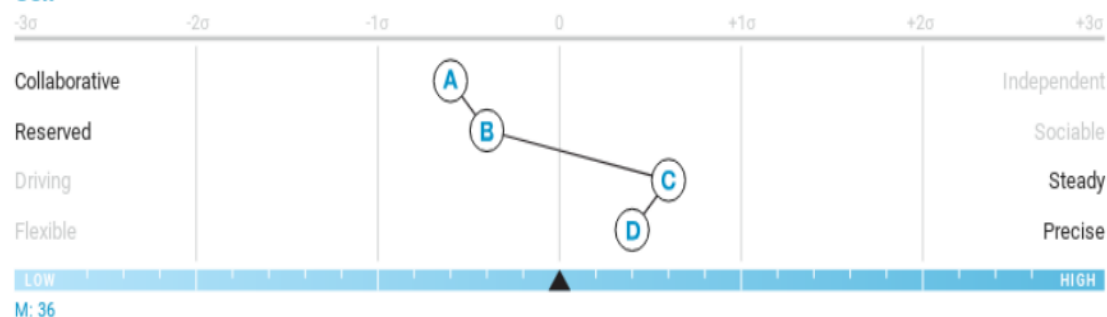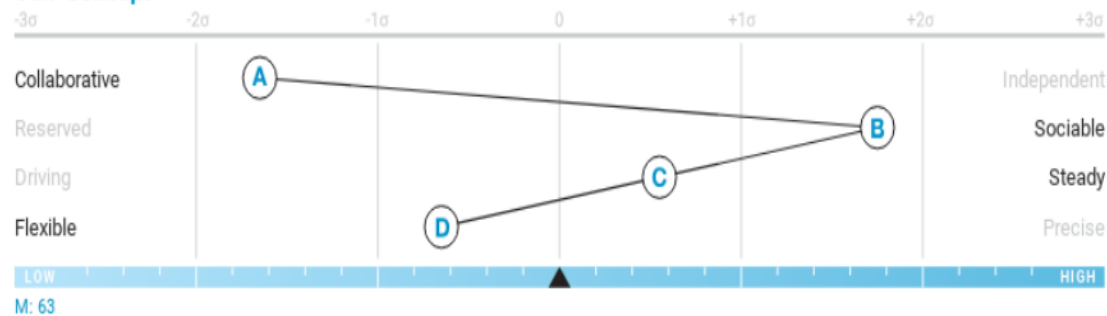Provides data-driven insights into personality traits that determine workplace behavior across four primary factors: Dominance, Extraversion, Patience, and Formality.

Where a person falls on a spectrum of these factors provides key insights into how that person operates in a work environment, in addition to alignment with job fit based on skills and behaviors required for success in a particular role.

Operator

An Operator is a patient, conscientious, relaxed and cooperative team worker.

Self

M: 36

Self-Concept

M: 63

Synthesis
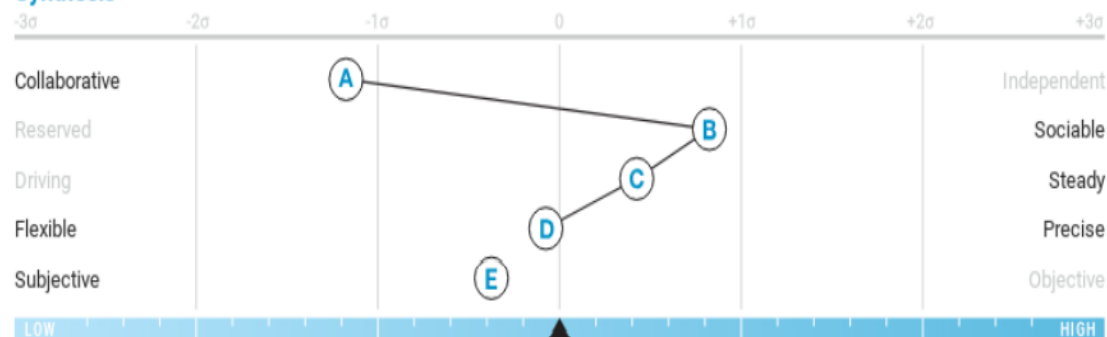
Strongest Behaviors

Martin will most strongly express the following behaviors:

- Unhurried and deliberate, stable and will do things using the established process; finds it difficult to change these systems. Dependable, consistent and needs familiar environments and coworkers to be most productive.
- Cooperative, easy-going, and agreeable in getting along with others. A focused, uncritical listener who won't "rock the boat."
- Methodical, steady, and even-paced; loses productivity when interrupted.
- Drive to protect the company against risk by doing things in general accordance with established standards.
- Careful; usually follows a plan to avoid making mistakes. Generally has proof to support decisions before taking action.
- Detail-oriented and helpful; works comfortably as part of a team and often checks work.

Summary

Helpful, patient, and stable; works steadily and consistently. Respectful of established processes, standards, and policies, they will work within those standards to ensure repeated successes and high-quality results. Martin has the patience and tolerance required for routine work and can be relied on to do such work consistently and in a relaxed manner. Prefers having, and following, a well thought-out process to ensure success. If they are responsible for establishing the process, they will do so in a thoughtful, methodical manner, paying close attention to details and time-honored successes. Once established, they'll expect that the process be followed consistently.

Will focus on the details of the work and will handle them with somewhat better than average accuracy. In work involving repeated contact with people, Martin will be pleasant, agreeable, and supportive. Derives satisfaction from helping others and likes to feel part of a secure team.

Fairly easygoing, this individual works at a steady, relatively unhurried pace and is most comfortable working within stable organizations with established processes. In the event of change in the work and responsibility, this individual will take time to learn the new work and responsibilities thoroughly, getting the "lay of the land" before taking action. This is true whether they're initiating changes to the process (which will only be done after very careful thought and research), or if they're being asked to make changes.

Putting together the right assessment toolbox for your credit union team development needs

Team Development Assessments:

DiSC

Human Synergistics Group Styles
Inventory (team
culture/effectiveness)

Predictive Index**

DiSC Team Map

Discovery Report Team Chart
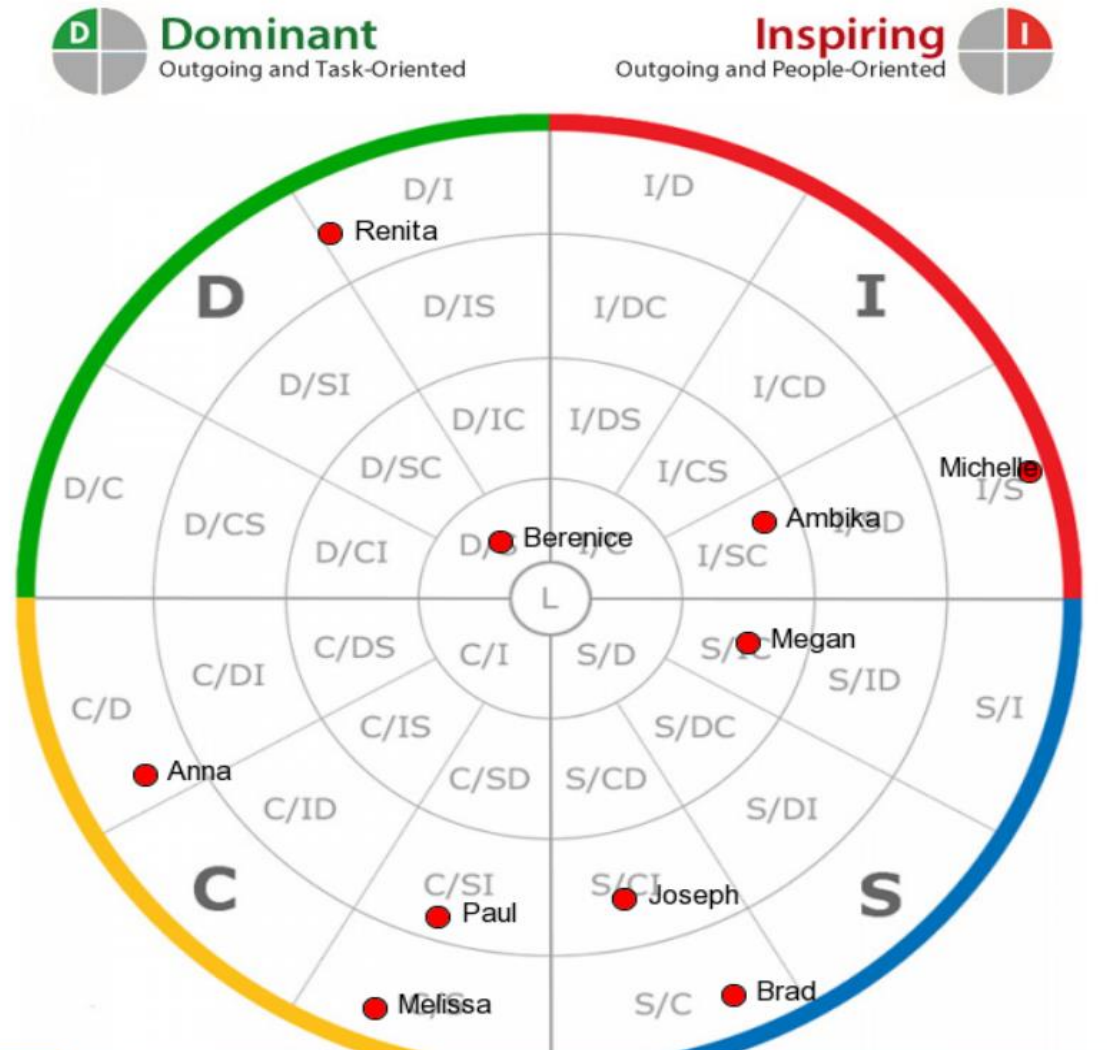
- What strengths does each style bring to our team?
- Why/how does it make our team stronger to have varying styles represented?
- How can I adapt my own style preferences to work more effectively with someone who has different style preferences than I do?

Group Styles Inventory (GSI)

- The Human Synergistics *Group Styles Inventory (GSI)* is the only research-based tool that provides a valid and reliable measure of how people in groups interact with each other and work as a team to solve problems.

- Extensively researched and internationally proven, this assessment provides group members with a safe way to talk about their behavior and how it affects the group's performance.

- Through highlighting styles of interactions that are helping or hindering their teamwork, it empowers them to change the way they approach problems and interact with each other – leading to better cooperation, communication and consensus, more innovative thinking, and higher quality solutions.
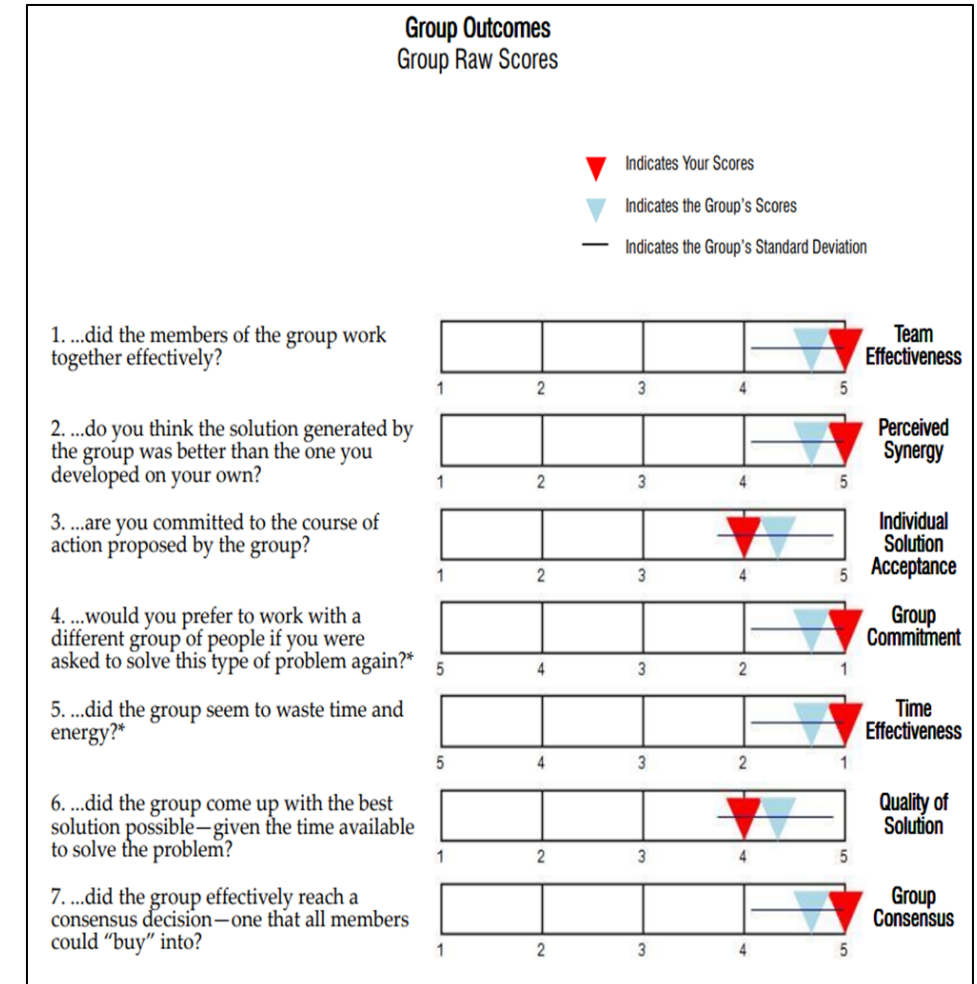
Group Styles Circumplex
Your Profle
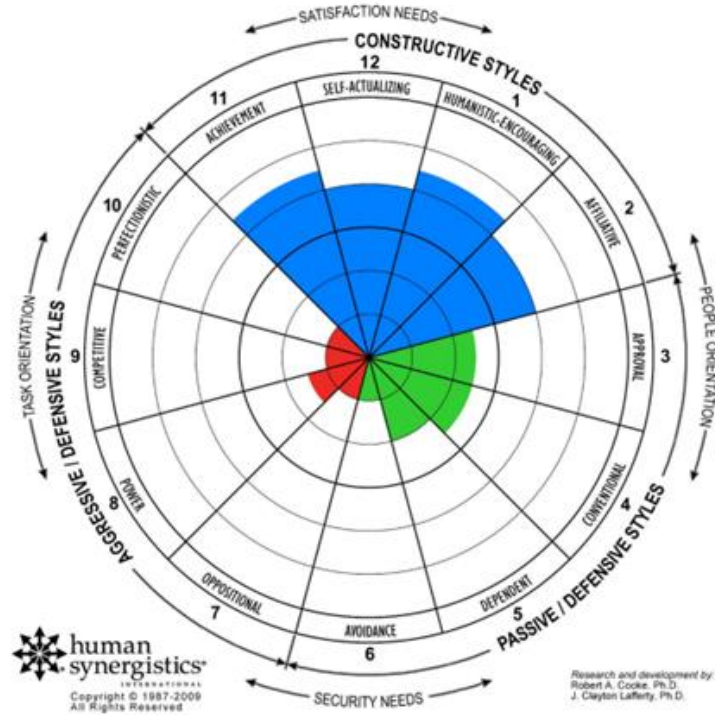
Constructive Styles	Percentile Score	Raw Score
Humanistic-Encouraging	82%	21.00
Affiliative	75%	21.00
Achievement	82%	20.00
Self-Actualizing	75%	20.00
Passive/Defensive Styles	Percentile Score	Raw Score

Group Styles Circumplex
Group Profile
N = 3
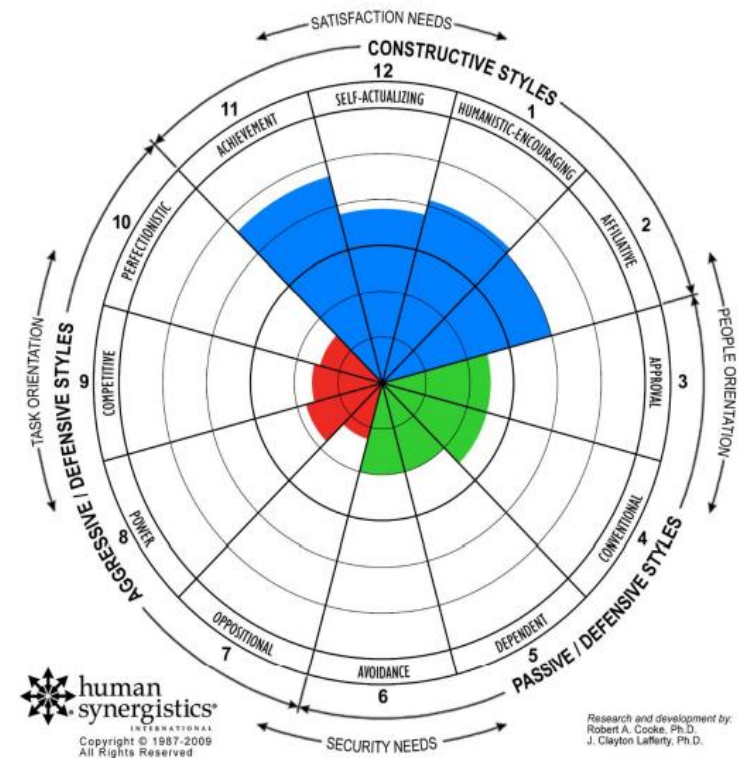
Constructive Styles	Percentile Score	Raw Score
Humanistic-Encouraging	77%	20.33
Affiliative	75%	21.00
Achievement	85%	20.33
Self-Actualizing	70%	19.67
Passive/Defensive Styles	Percentile Score	Raw Score
Approval	37%	4.00
Conventional	37%	5.00
Dependent	25%	3.00

PI for Teams

DESIGN AMAZING TEAMS

Turn any team into a high-performing team.

See why a team is struggling to execute its goals — and know exactly how to move forward to help them succeed.

Learn About The Platform

Exploring
TEAM TYPE

Producing
STRATEGY

Credit Union National Association
CUNA
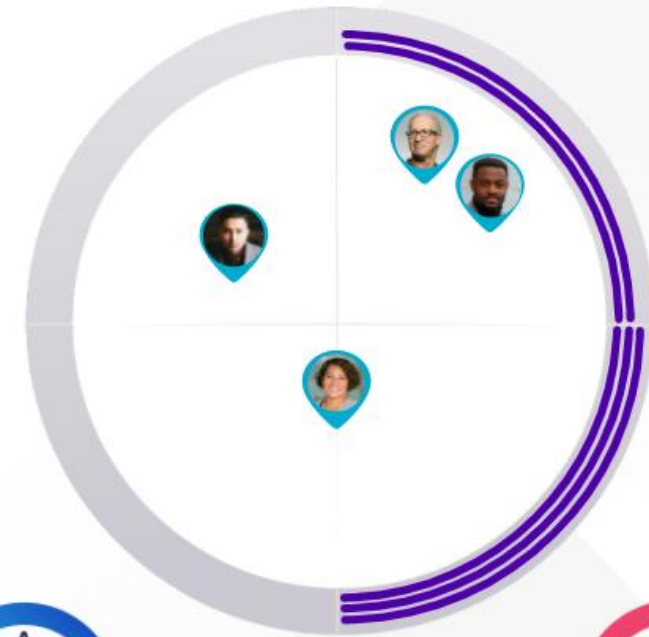
Putting together the right assessment toolbox for your credit union organizational development needs
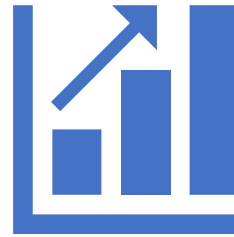
Organizational Assessments

Human Synergistics Organizational Effectiveness Inventory (OEI) and Organizational Culture Inventory (OCI)

Organizational Effectiveness Inventory (OEI)

Summary Barchart of Causal Factors (Percentile Scores)
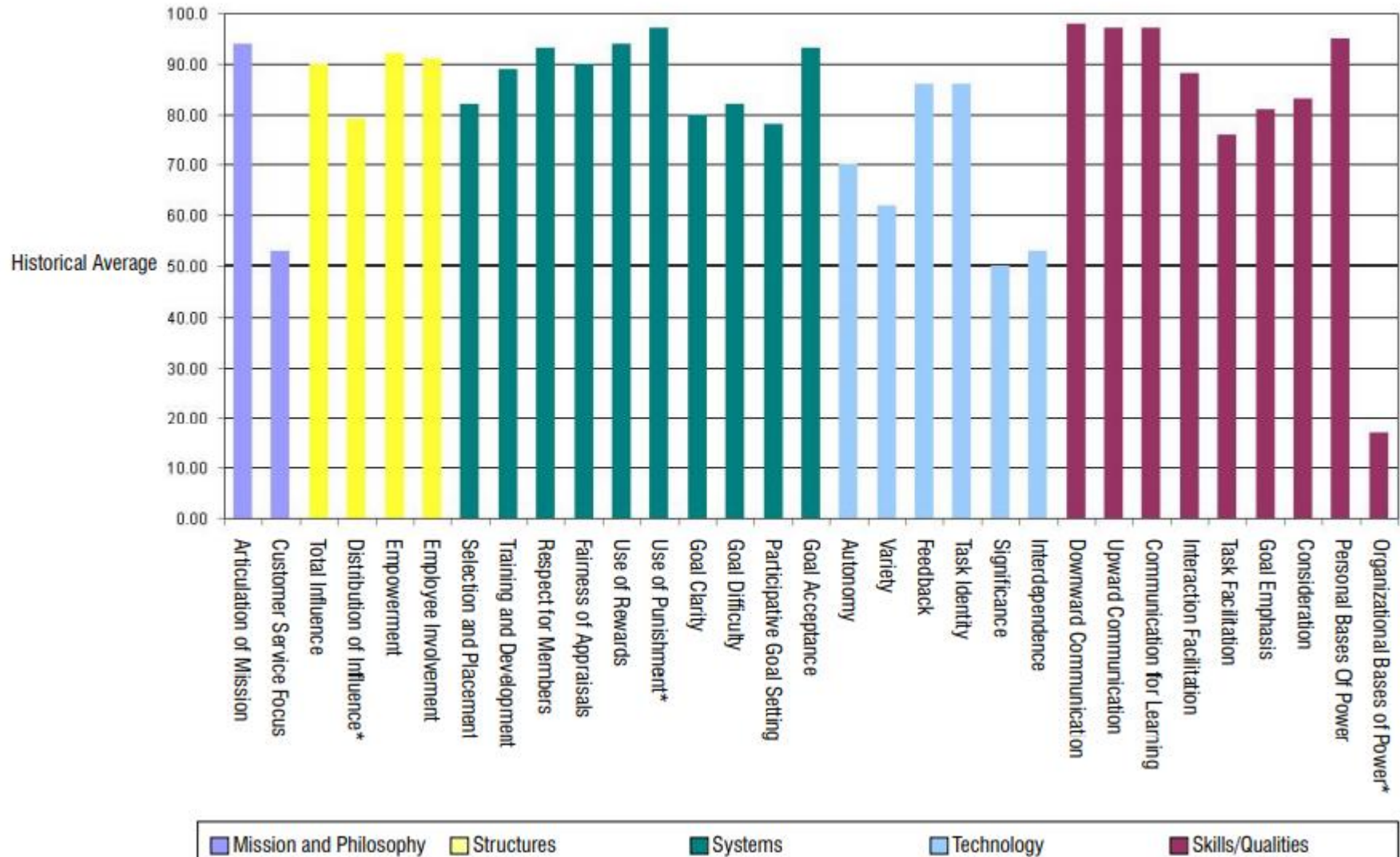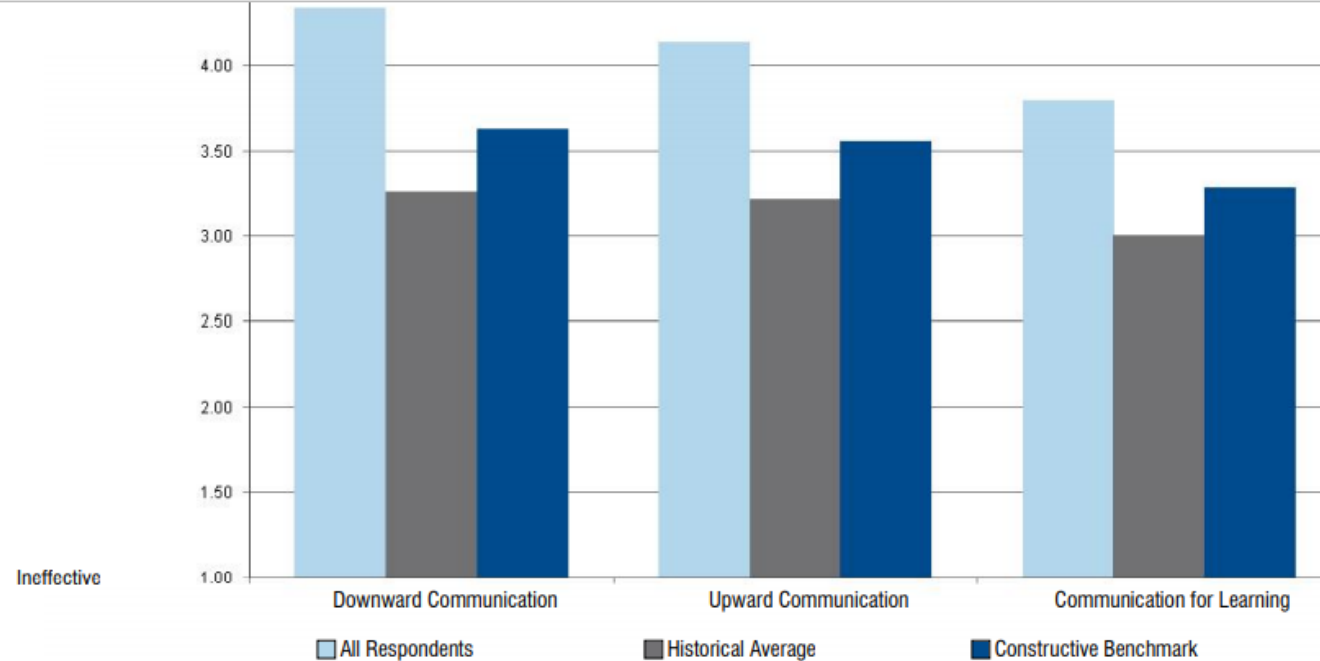
	All Respondents	Historical Average	Constructive Benchmark
Downward Communication	**4.33**	**3.25**	**3.63**
Credible (not Questionable)	4.68	3.75	4.22
Complete (not Sketchy)	4.60	3.39	3.81
Consistent and confirmatory (not Changing and confusing)	4.41	3.10	3.59
In-Depth (not Superficial)	4.05	3.21	3.55
Anticipated and understood (not Unexpected and surprising)	4.04	3.12	3.46
Straight from the source (not Through too many channels)	4.37	3.06	3.60
Timely (not Delayed)	4.64	3.42	3.80
Through formal channels (not Through the "grapevine")	4.36	3.24	3.63
Easily processed (not Information overload)	3.86	3.11	3.25
Upward Communication	**4.14**	**3.22**	**3.55**
Accepted (not Rejected)	4.31	3.29	3.65
Understood (not Misinterpreted)	4.32	3.35	3.73
Honest and complete (not Filtered and distorted)	4.36	3.34	3.67
Acted On (not Ignored)	3.97	3.17	3.50
Whatever needs to be said (not Only what they want to hear)	3.99	3.20	3.50
Provided voluntarily (not Provided only when demanded)	4.19	3.27	3.60
Forthright (not Censored)	4.17	3.12	3.50
Positive—suggestions (not Negative—complains)	3.95	3.06	3.34
How we can make things work (not "Why things won't work")	3.99	3.10	3.50
Communication for Learning	**3.79**	**3.00**	**3.28**
How do we learn from mistakes (not Who do we blame for mistakes)	4.46	3.38	3.95
Reflects a team perspective (not Reflects individual viewpoints)	3.99	3.11	3.41
Emphasizes the big picture (not Emphasizes micro-management)	4.46	3.47	3.76
Concerned with interdependencies (not Concerned with isolated jobs/tasks)	3.59	2.92	3.05
To promote discussion (not To communicate decisions)	2.90	2.50	2.71

Organizational Culture Inventory (OCI)

All Respondents

Current Culture

Ideal Culture
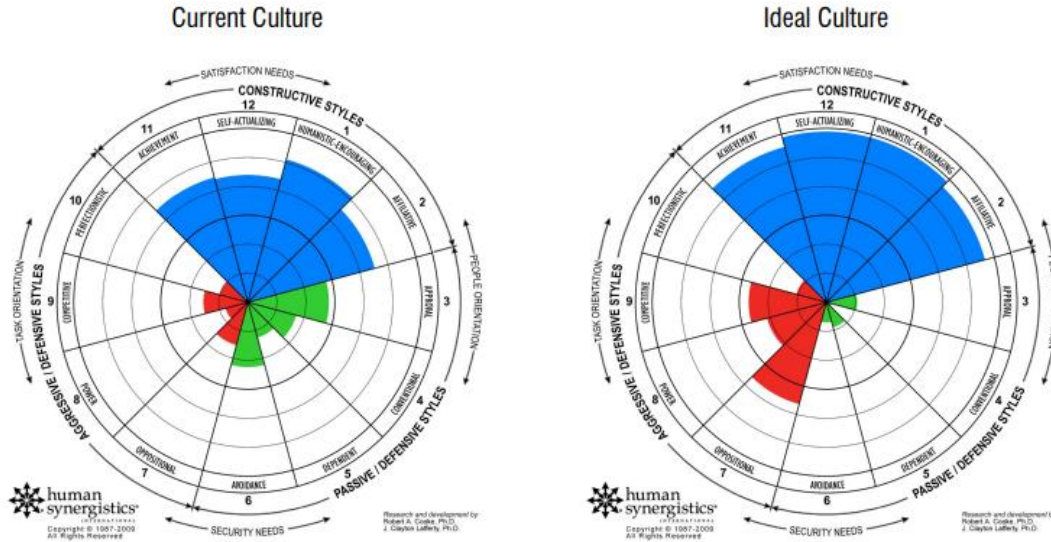
Overall, the largest gaps between the Current and Ideal profiles are in the
Passive/Defensive cluster.

With respect to the specific cultural norms, the...

Primary gap is
Approval

Secondary gap is
Avoidance

Specifically, the items that have the largest gaps are:
- switch priorities to please others
- do things for the approval of others
- be a "nice guy"

Specifically, the items that have the largest gaps are:
- push decisions upward
- make "popular" rather than necessary decisions
- be non-committal

Constructive Styles	Current Percentile	Ideal Percentile	Percentile Gap*
Humanistic-Encouraging	91.00%	98.00%	-7.00%
Affiliative	83.00%	96.00%	-13.00%
Achievement	82.00%	95.00%	-13.00%
Self-Actualizing	81.00%	98.00%	-17.00%
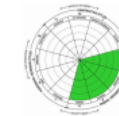
Passive/Defensive Styles	Current Percentile	Ideal Percentile	Percentile Gap*
Approval	45.00%	11.00%	34.00%
Conventional	21.00%	2.00%	19.00%
Dependent	14.00%	9.00%	5.00%
Avoidance	31.00%	7.00%	24.00%
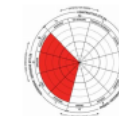
Aggressive/Defensive Styles	Current Percentile	Ideal Percentile	Percentile Gap*
Oppositional	18.00%	66.00%	-48.00%
Power	8.00%	28.00%	-20.00%
Competitive	18.00%	42.00%	-24.00%
Perfectionistic	10.00%	11.00%	-1.00%

*Percentile gaps = current percentile - ideal percentile. Negative gaps for the Constructive styles and *positive* gaps for the Passive/Defensive and Aggressive/Defensive styles indicate areas for cultural change and improvement. *Positive* gaps for the Constructive styles and *negative* gaps for the Defensive styles indicate areas

In my credit union, we:

Use individual, team, and/or organizational assessments (at least 2 of 3)

Use Individual assessments only

Use team assessments only

Use organizational assessments only

Don't currently use assessments

CUNA Association

If I had to select my top tools…

- For individual styles/team styles/effectiveness
  - DiSC

- For professional/leadership development
  - A 360-assessment tool (CCL Benchmarks or Human Synergistics Leadership Impact or Manager Impact)

- For specialty capabilities development
  - Emotional Intelligence -EQi 2.0

- For organizational effectiveness (identifying strengths and development needs)
  - HSI Culture (OCI) or Organizational Effectiveness assessment (OEI)

Key Takeaways

- There are a plethora of assessment diagnostics available for a variety of needs, i.e. individual, team, and organizational effectiveness and development

- Assessments provide a framework to analyze/discuss individual, team, and organizational development needs, create a set of benchmarks for measuring and re-measuring, allows actions and decision-making to be made around data vs. intuition, and creates efficiencies via better targeted development efforts

- It can be helpful to ensure the tools you select are researched and evidenced-based tools that are tested for validity and reliability

- 360 assessments can be especially helpful as they can provide insights into "blindspots" we may not be aware of, i.e. self perception can differ from perception by others

- Assessments provide data, but data is only helpful if you do something with it, i.e. take action on the data

Additional Resources/Learning

• Aspiretalentgroup.com

"Freebies" for You!

https://www.aspiretalentgroup.com/cunaell2021

The best way to learn is to experience...

Please feel free to reach out if you would like to do a complimentary Predictive Index Behavioral Assessment & Report

From Data to Insights:

What Every L&D Professional Should Know About the Value of Using Assessments

Tracy Nelson, MSOD, SPHR, CPTD

Aspire Talent Group