

### NEWEST TRG LEADERSHIP TOOL

#### "Practical Means for Dealing with Difficult Times"

This section of our site features business tools and planning considerations designed to assist leaders for whom "just keeping up" is not good enough. These notes focus on sequences of thought and action intended to enhance the positioning of your group, both on a long and short-term basis.

Each week additional sets of Tools on a wide array of business subjects will appear. Your input is requested as to which Tools might be of interest to you. Requests will NOT create any form of obligation on the Reader who makes the suggestion, but will help us understand which subjects are of general interest.

Please check back weekly to review the next tool. Visit our [LEADERSHIP TOOLS ARCHIVE](#) for previous tools.

## ASSESSMENT SEQUENCE

### PREMISE:

"Groups" can be considered to be aggregations of individuals or sub-groups, either organized around a *business function* or by *affinity*. While no two groups can be the same, there are distinct patterns to the way in which groups behave.

To *influence* those behaviors it may be useful to capture an appraisal (assessment) of a targeted Group's circumstance at a given point in time, understanding that Groups are dynamic and are constantly shifting in shape and character even while being assessed.

For this reason it is advisable to:

- Conduct assessments on a cyclical basis (in the absence of a compelling need for an ad hoc study)
- The key attributes of the perceptions to be developed include:
- Conduct the entire assessment from end to end, even when there are 'facts' assumed to be understood
- Report the assessment in a form that is readily comprehensible to an individual with general knowledge of the field, even if that individual has had no involvement in or prior knowledge of either the conduct or results of the assessment.

**NOTE:** While an Assessment is a critical step in the development of an intended Plan (E.G. Strategic, Operational or Implementation), it should not be confused with the eventual Plan which it supports. A good Preliminary Assessment is only a first step toward arriving at a Plan and not a complete result beyond a circumstantial check.

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### ATTRIBUTES OF A VALUABLE ASSESSMENT:

- All Groups are dynamic. Since in the moment it is captured an assessment becomes static, a good assessment should take into consideration the relative influence of:
  - Recent or long term shifts in membership
  - The views and influences of external Stakeholders (example recent shifts in public opinion)
  - Current status of and prospects for change in laws, regulations or common operating procedures
- Patterns of Potential Assessments Include:
  - Technical: Science, History, Geography
  - Relational: Balancing Forces - Driven by Circumstances, Human Nature and Self Interest
  - Personalities: The identity and role of Key Participants
  - Evolutionary: Historic (past) - Projected Trajectory (prospective)

### RISK INVOLVED IN POOR ASSESSMENTS:

How an assessment is captured and communicated is often as important as the underlying information, since information that is misperceived may be less than useful at best and in the worst case, destructive. Poor assessments can not only lead to poor decisions, but also to conflict within a group as different members decide whether and to what extent to accept any and all decisions made with what may be perceived as bad data.

The effectiveness of an assessment will generally only be as effective as the sophistication of the process by which it was specified, sanctioned and implemented.

### COMPONENTS OF A PRE-PLAN ASSESSMENTS:

Pre-Plans may include:

- Data:
  - Raw: Pure Numbers open to analysis. **Example:** "47 Ranch-owners in the valley answered the survey"
  - Correlated: A bulk of data gathered in such a way, so as to show the relationship between different sets. **Example:** "12 of the ranchers raised sheep and of those 4 also raised their own corn and of those 1 sold three times the corn used for the flock."
  - Analyzed: Sets of numbers from which positional conclusions have been reached. **Example:** "The youngest line worker in the union is now 53, with half the active members already scheduled to retire within 24 months, leading to the Leadership to believe that recruitment will become a significant issue."
- Text:

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- Key Elements: The critical points of the Assessment. **Example:** "Most of the businesses surveyed use their Annual Budgeting process in place of a formal Strategic Planning effort."
- Narrative: A descriptive commentary of those points. **Example:** "The principle reason given for by-passing the planning process was the belief that structured planning is an esoteric exercise, in some way disconnected from either the long term direction or the short term needs of the organization, instead a vital step in affirmatively setting the group's direction."
- Presentation Media: (Basic forms, means, standards and measures)
  - Written: Press Releases, Position Statements, Findings, etc.
  - Verbal: Conducted from notes or a script to assure consistency
  - Graphic Display: Simple and direct
  - Interactive: Considered and practiced with a limited group before being taken to a broader audience
  - Multi-media: Frequently live 'on-line' enhanced by face-to-face steps

For additional information regarding ASSESSMENT SEQUENCE, please visit our [Contact Page](#) and send us an Email or simply call us directly during East Coast business hours on our toll free number 1.800.97-REGIS (1.800.977.3447).