

Working with My Manager Scorecard

Instructions:

Plotting the Combinations

Determine the Factor Combinations of the individual for A:B, A:C and A:D.

Factor Combinations may:

- Cross the Midpoint (ex: A > B)
- Be on the same side of the Midpoint (ex: A & B Both High or Low)
- Be aligned (ex: A = B)

Scoring

Check off and score 1 point for each of the strategies you regularly use when working with this person.

Total Score: ____ out of 12

Action Planning

Now that you know your score, check out the Action Planning template to plan for future interactions.

A:B Task or People Oriented	<input type="radio"/> A & B: Both Low	<input type="radio"/> B > A: People Oriented (Crosses the Midpoint)
	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Communicate 1:1 while discussing difficult situations <input type="checkbox"/> Offer to help with decisions when necessary <input type="checkbox"/> Provide support and guidance when addressing new tasks or assignments <input type="checkbox"/> Communicate information early, allowing time to think things through <p style="text-align: right;">Score: ____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Take the time to connect and talk things through when communicating <input type="checkbox"/> Lead with the people implications for any initiative I wish to introduce <input type="checkbox"/> Communicate in person rather than in writing or via email <input type="checkbox"/> Provide frequent updates on projects they care about or are closely associated with <p style="text-align: right;">Score: ____ out of 4</p>
A:C Proactive or Responsive	<input type="radio"/> A & C: Both Low	<input type="radio"/> C > A: Responsive (Crosses the Midpoint)
	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Clarify how expedited work will help team efforts <input type="checkbox"/> Look for ways to streamline processes, create templates and systems for routine tasks <input type="checkbox"/> Respond to their requests quickly <input type="checkbox"/> Ensure that initiatives and agendas are clear and concise <p style="text-align: right;">Score: ____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Avoid fire drills or last-minute, high-stake requests that create pressure or tension <input type="checkbox"/> Follow a consistent process when we are working together <input type="checkbox"/> Make sure my interactions don't feel rushed or transactional <input type="checkbox"/> Include the "why" when introducing a new idea <p style="text-align: right;">Score: ____ out of 4</p>
A:D Comfortable or Cautious With Risk	<input type="radio"/> A & D: Both Low	<input type="radio"/> D > A: Cautious with Risk (Crosses the Midpoint)
	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Encourage and support their flexible approach to assigning work <input type="checkbox"/> Present my new, innovative ideas freely to this collaborative manager <input type="checkbox"/> Check in on timelines and the non-negotiables on deliverables <input type="checkbox"/> Schedule time to brainstorm and build consensus with the team <p style="text-align: right;">Score: ____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide detailed information when describing my point of view <input type="checkbox"/> Take caution not to criticize the established rules and processes <input type="checkbox"/> Provide thorough, specific responses to their questions and requests <input type="checkbox"/> Give them ample information to support their decisions <p style="text-align: right;">Score: ____ out of 4</p>



Your Name: _____ Employee Name: _____ Date: _____

<p><input type="radio"/> A = B</p>	<p><input type="radio"/> A & B: Both High</p>	<p><input type="radio"/> A > B: Task Oriented (Crosses the Midpoint)</p>
<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Balance my communication to include a mix of email, face-to-face, phone and writing <input type="checkbox"/> Support their need to identify solutions, collaboratively or independently <input type="checkbox"/> Communicate information early, allowing time to think things through <input type="checkbox"/> Include the technical and people aspects of a situation when presenting new ideas <p style="text-align: right;">Score: _____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Schedule brainstorming sessions when new initiatives arrive <input type="checkbox"/> Solicit their input on my priorities and challenges <input type="checkbox"/> Support their need to identify solutions, collaboratively or independently <input type="checkbox"/> Request their help to promote my ideas throughout the organization. <p style="text-align: right;">Score: _____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Keep communications focused on tasks rather than topics that are social in nature <input type="checkbox"/> Solicit their feedback, particularly in areas of their technical expertise <input type="checkbox"/> Focus on obtaining tangible results rather than softer achievements <input type="checkbox"/> Emphasize the technical rather than people aspects when solving problems and making decisions <p style="text-align: right;">Score: _____ out of 4</p>
<p><input type="radio"/> A = C</p>	<p><input type="radio"/> A & C: Both High</p>	<p><input type="radio"/> A > C: Proactive (Crosses the Midpoint)</p>
<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide them with sufficient time to respond to requests or changes that arise <input type="checkbox"/> Take the time to patiently listen to their point of view <input type="checkbox"/> Schedule regular checkpoints in our work together but let them deviate when needed <input type="checkbox"/> Anticipate their sometimes competitive and sometimes cooperative approach <p style="text-align: right;">Score: _____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Explain the “why” behind changes I want to make <input type="checkbox"/> Anticipate an independent decision on their timetable <input type="checkbox"/> Explain the big picture when quick decisions need to be made <input type="checkbox"/> Build regular checkpoints into processes and allow ample time for them to provide feedback <p style="text-align: right;">Score: _____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Prompt them to take more time to think about structure and details when carrying out their initiatives <input type="checkbox"/> Respond positively to new challenges and tight deadlines <input type="checkbox"/> Minimize routine and repetition when working together <input type="checkbox"/> Ensure that my conversations with them get right to the point <p style="text-align: right;">Score: _____ out of 4</p>
<p><input type="radio"/> A = D</p>	<p><input type="radio"/> A & D: Both High</p>	<p><input type="radio"/> A > D: Comfortable with Risk (Crosses the Midpoint)</p>
<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide detailed information when they are torn between “getting it done” and “getting it right” <input type="checkbox"/> Make myself available when they are making an important or risky decision <input type="checkbox"/> Engage them privately when a discussion is needed <input type="checkbox"/> Provide them with viable options to help them move forward to action <p style="text-align: right;">Score: _____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Show them the process I’ll follow to achieve their goals <input type="checkbox"/> Make myself available when the person is making a decision outside of their area of expertise or when structure is unclear <input type="checkbox"/> Utilize a positive, constructive approach when we are working together <input type="checkbox"/> Leverage their strength regarding process and structure when we are working with uncertain ideas <p style="text-align: right;">Score: _____ out of 4</p>	<p>Do I currently:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Keep conversations “big picture”, with goals and strategy in mind <input type="checkbox"/> Present the tangible outcomes of any ideas I want to promote <input type="checkbox"/> Include an executive summary when presenting detailed information <input type="checkbox"/> Help create an execution plan for any new ideas they initiate <p style="text-align: right;">Score: _____ out of 4</p>

Your Name: _____ Employee Name: _____ Date: _____

Action Plan

Instructions:

Look over the results of your Scorecard to help you complete each section below.

1. Personal Reflection

What have I done well with this individual?

What can I do better with this individual?

2. Action Plan

What specific actions will I take in the next 90 days to enhance the way I work with this individual?

For example: *I will take Emily (high Extraversion) to lunch once a month to establish a more personal connection.*

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3. Understand the Impact of My Own PI Behavioral Pattern

Knowing my own PI behavioral pattern, what might prevent me from carrying out my Action Plan?
What will I do about that?

4. Check My Progress

I will follow up with _____ (select another participant)
on _____ (date) to discuss my progress regarding this Action Plan.