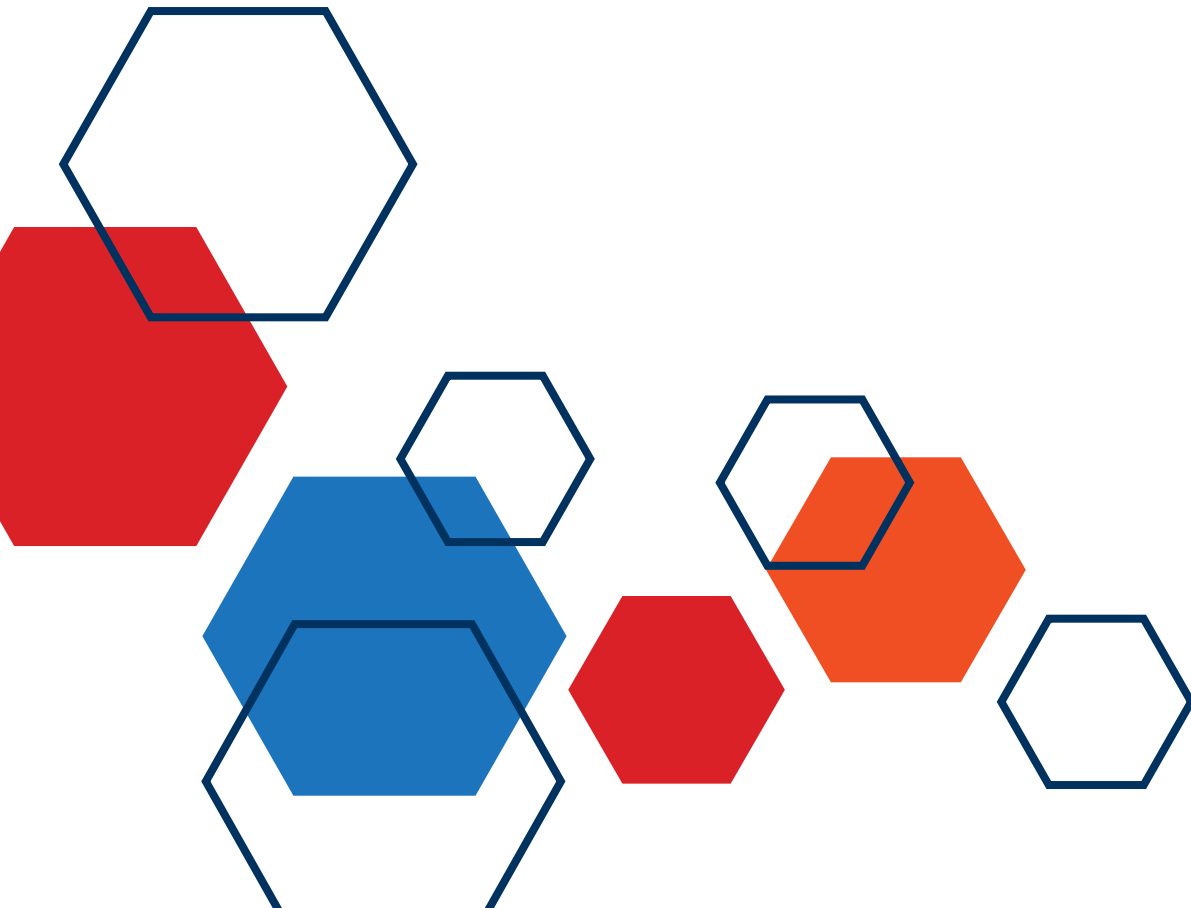


# Thought Leadership

## The Executive Checklist

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# The Executive Checklist

This checklist keeps busy executives strategically focused and accountable for improving leadership and business capability, to drive bottom line results. The Executive Checklist is a roadmap of best practices for achieving leadership and business excellence. It can be used as an assessment tool by individual managers and management teams to:

- ✓ Assess the strengths and opportunities of the business/business unit
- ✓ Get the difficult issues on the table for discussion
- ✓ Identify gaps in current business practices
- ✓ Identify opportunities for leadership development (assessments, programs or coaching)
- ✓ Sign off on an action plan that could take the business to the next level

Turbulence and disruption are now the new norms for the business world. Winning organisations will be those that can reinvent themselves faster than their competitors. Leading change is a key capability. Leadership and engagement are measurable and can be improved. If you add business excellence disciplines, you should be well placed to outperform the competition. The Executive Checklist should help many managers to assess their business/business unit and develop an action plan for improvement.

## Scoring

Managers are asked to rate the 50 items as being low, medium or high for the business. If the amount of greens is significantly higher than the reds, it is likely that you have a high performing business.

**LOW****MEDIUM****HIGH**

## Sample items include:

- |   |   |
|---|---|
| <b>1.</b> We have succession plans in place for all senior management positions   | <b>6.</b> We use personality and cognitive testing when hiring new managers   |
| <b>2.</b> All teams are expected to be high performing, and we regularly review their culture and performance               | <b>7.</b> Every year we spend money on targeted leadership programs to develop bench strength and capability            |
| <b>3.</b> The bottom 10 percent of employees are identified regularly and either improve, or are removed in a timely manner | <b>8.</b> All managers are measured annually through 360° reviews, employee surveys or high-performing team assessments |
| <b>4.</b> Our supplier networks are strategically focused on fewer and more agile partners                                  | <b>9.</b> We listen and act on the voice of the customer using multiple modes   |
| <b>5.</b> Our one-page plan is used as a communication tool for all employees   | <b>10.</b> Our managers have development plans to further build behavioural and business competencies                   |

**“ The quality of people’s lives depends on their careers. The quality of people’s careers depends on the organisations in which their careers are embedded. The success of these organisations depends on their leadership. The effectiveness of the leadership depends on the characteristics of the people in leadership roles. Ultimately, then, personality drives leadership, leadership drives organisational performance, and who is in charge matters greatly for the fate of organisations and the people in them.**

**- Dr. Robert Hogan**



# Leadership, Engagement, Performance

Leadership behaviour drives strategy, team performance, employee engagement and culture. High performing teams should be a goal in business. Leadership is about results, teams deliver results, so judge the leader by the team.

There needs to be a strong strategic planning cycle, focusing on both the long term and the short term. A one-page summary plan should be used for high level clarity, accountability and communication. Key performance indicators should cascade into second tier teams. A balanced scorecard approach should be taken, which includes a measure of employee engagement.

The focus on strategy and people needs to be connected by understanding that people deliver results and engagement is not an end in itself but the means to delivering superior results.

Investment in leadership assessments, coaching and development programs is growing globally. An emerging trend is looking for return on investment. This can be measured by individual and team performance and ultimately by employee engagement. This is best understood and managed by people analytics. The challenge is being able to connect people data with operational and financial data.

## PBC Offerings

### HOGAN

#### THE SCIENCE OF PERSONALITY

As the Australian Distributor of Hogan Assessments, PBC is proud to support our clients apply the Hogan range of assessments to address business needs. Hogan uses the powerful science of personality assessment to support organisations to select the right people, develop talented employees, build great leaders, and impact the bottom line. Grounded in more than four decades of validated research, Hogan assessments were the first to scientifically measure personality for business.

### TEAMS

#### BUILD BETTER TEAMS

PBC supports team development and success through targeted solutions that focus on building high performing teams; improving the effectiveness of newly formed teams; getting dysfunctional teams back on track; and supporting teams to collaborate across different functional areas.

### 360 AND PERSONALITY DIAGNOSTICS

PBC offers a range of psychometrics tools, multi-rater assessments and surveys to meet your organisation's talent selection, development and engagement needs. Our Consultants ensure our range of diagnostics are supported by practical resources, regularly updated benchmarks and technical guides.

### RESEARCH & ANALYTICS

#### LEVERAGE DATA FOR BUSINESS INTELLIGENCE

PBC supports our clients to use their people analytics data in a meaningful way. We help our clients understand what data they have access to and how this can be used to answer questions regarding their workforce, how they compare with their competitors, and how they can improve their organisation's performance.

### SELECTION

#### ENSURE THE RIGHT PEOPLE IN THE RIGHT ROLES

PBC is able to leverage over 25 years of experience and research around best practice recruitment in order to identify areas where your current processes can be enhanced. We support our clients to understand capability requirements, and assess against these requirements using a best practice-evidence based approach.

### LEADERSHIP

#### IDENTIFY, DEVELOP AND RETAIN YOUR LEADERS

For over 25 years, PBC has provided leadership solutions including, executive and board selection, leadership development programs, female leadership programs, unconscious bias training and executive coaching. During this time, PBC has worked in partnership with Hogan on a range of research projects on leadership capability, giving us unique insight into what makes a leader successful.

### CONSULTING

Our expertise in leadership, business consulting, people and culture, and analytics provides the necessary foundation to undertake successful business improvement initiatives that deliver real returns on investment for our clients. Our consulting solutions include strategic business planning workshops, leadership programs, team building, talent management and analytics projects through to executive coaching. All our solutions are informed by robust diagnostics and contemporary research.

# Leadership Performance

We define building leadership performance as having six key result areas:

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- 1. MEASURING, UNDERSTANDING AND IMPROVING YOUR BRAND**

Brand is one's reputation as seen by observers. It is critical to one's success. Brand involves both behavioural and business competencies. It starts with self-awareness, which is best achieved through personality assessments, 360 feedback, coaching and practice. One needs to be motivated and disciplined to improve competence, confidence and reputation. A person's brand is ultimately what they choose it to be.
- 2. GETTING RID OF BAD HABITS AND ADDING NEW HABITS**

Good habits are competencies that make an individual more effective. It's about being likeable and capable. Competencies can be developed from self-awareness. One needs feedback to discover what to keep doing, stop doing and start doing. Habits can be personal (exercise) and professional (setting goals/KPIs). They can be learned and become second nature. But remember, the brain is a slow learner, it takes a lot of practice and persistence.
- 3. BUILDING EMOTIONAL INTELLIGENCE (EQ) COMPETENCIES**

Everyone has a natural level of EQ. Most importantly, emotional competencies can be learned if one is motivated to do better. These competencies relate to people and social skills, and managing emotions maturely (i.e. getting along to get ahead). The goal is to demonstrate intra- and inter-personal skills so that one is engaged and engaging. Being resilient and warm gets people connected, builds trust, and enables one to influence others.
- 4. BEING RESILIENT**

Using positive energy and thoughts to cope with turbulence and disruption is critical to sustainable performance. We want people to be in the high-performance zone with positive thoughts and energy. This is best achieved by practicing recovery ("me time" for rest and renewal). The goal is to avoid stress and burnout, which impacts 70 percent of managers in their careers. Energy is expended and must be recovered. Human beings are not machines.
- 5. EXERCISING GOOD JUDGEMENT**

Consistently making the right calls when it comes to big decisions is crucial. Managers must focus on getting the key business decisions right, especially concerning strategy, staffing and operations. Risk management is crucial. People's judgements can be some of the hardest. Good judgement is not an inherent trait for most people, but rather a skill that can be developed. Half of all decisions end in failure and can damage one's brand.
- 6. BUILDING A HIGH-PERFORMING TEAM**

Leading and sustaining a high-performing team is the ultimate measure of a leader. Business is about delivering results. Teams deliver results. Therefore, a leader should be measured by the culture and performance of their team. Many teams are dysfunctional, which impacts performance. The concept of "one team, one plan" is critical to getting everyone on the same page. Assessing team strengths and opportunities is the key to improvement.



# Business Performance

We define building business performance as also having six key result areas:

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- 1. HAVING A STRATEGIC PLANNING CYCLE**

Having a robust and strategic planning cycle with quarterly reviews is the key to being strategic, not just operational. Managers have to work on the business, not just in the business. The one-page business plan describes what winning looks like, and helps provide clarity and focus. Financial and non-financial goals are needed to achieve a balanced scorecard. The focus needs to be both short term and long term.
- 2. BUILDING A PERFORMANCE CULTURE**

A performance culture helps the business plan succeed. Culture can be guided by organisational values, and these should be supported by articulating desirable and undesirable employee behaviours. Values without behaviours can be useless. A performance culture drives discretionary effort, productivity and customer engagement, whereas a culture of legacy or entitlement can destroy a business.
- 3. ACHIEVING EMPLOYEE ENGAGEMENT**

Employee engagement is based on the effectiveness of recruitment, induction, development, motivation and retention. Hire hard and manage easy. Companies should aim to be an employer of choice, or a great place to work, because engagement pays. It delivers on safety, productivity, sales, profitability and retention. Engagement is most impacted by managers (this should be measured), followed by team culture and job fit.
- 4. ACHIEVING CUSTOMER ENGAGEMENT**

Customer engagement is crucial to building loyalty, cross-selling and receiving referrals. Customers want functional and emotional value, which drive repeat business. Functional value is defined by price, value, quality and reliability. Emotional value is created around the service experience, good communication and relationships built on trust. Customer surveys measure engagement and identify improvement opportunities.
- 5. DELIVERING SERVICE AND OPERATIONAL EXCELLENCE**

Most businesses have traditionally had 30 percent waste and inefficiency through errors and double handling. Re-work is the enemy. Businesses need to adopt the philosophy of “get it right, first time, every time.” Quality improvement tools should be used to work toward zero defects on key processes. This will drive productivity, efficiency and cycle time. Supply chain management and partnering with important suppliers is critical.
- 6. EXECUTING THE STRATEGY**

This involves having discipline around KPIs and a regular strategic meeting rhythm. Accountability must be strong. Poor performance should be called out. Leading change successfully and dealing with employees’ emotions on this journey is critical for reinventing the business and coping with a turbulent external environment. Execution is a form of competitive advantage when carried out better than the competition.

**For more information on The Executive Checklist and our other tools and assessments, email [info@peterberry.com.au](mailto:info@peterberry.com.au)**

### **About Peter Berry Consultancy (PBC)**

PBC is a multidisciplinary global consulting firm with 30 years' experience in the delivery of solutions aimed at maximising the potential of individuals, teams, leaders and organisations. We undertake research to support our evidence-based solutions and have a network of partners and distributors globally.

PBC is the Australian distributor of Hogan Assessments and the authors of a range of diagnostics including the Hogan 360 suite, Agile suite, High Performing Team Assessment (HPTA), and co-authored the Hogan Safety Climate Survey.

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