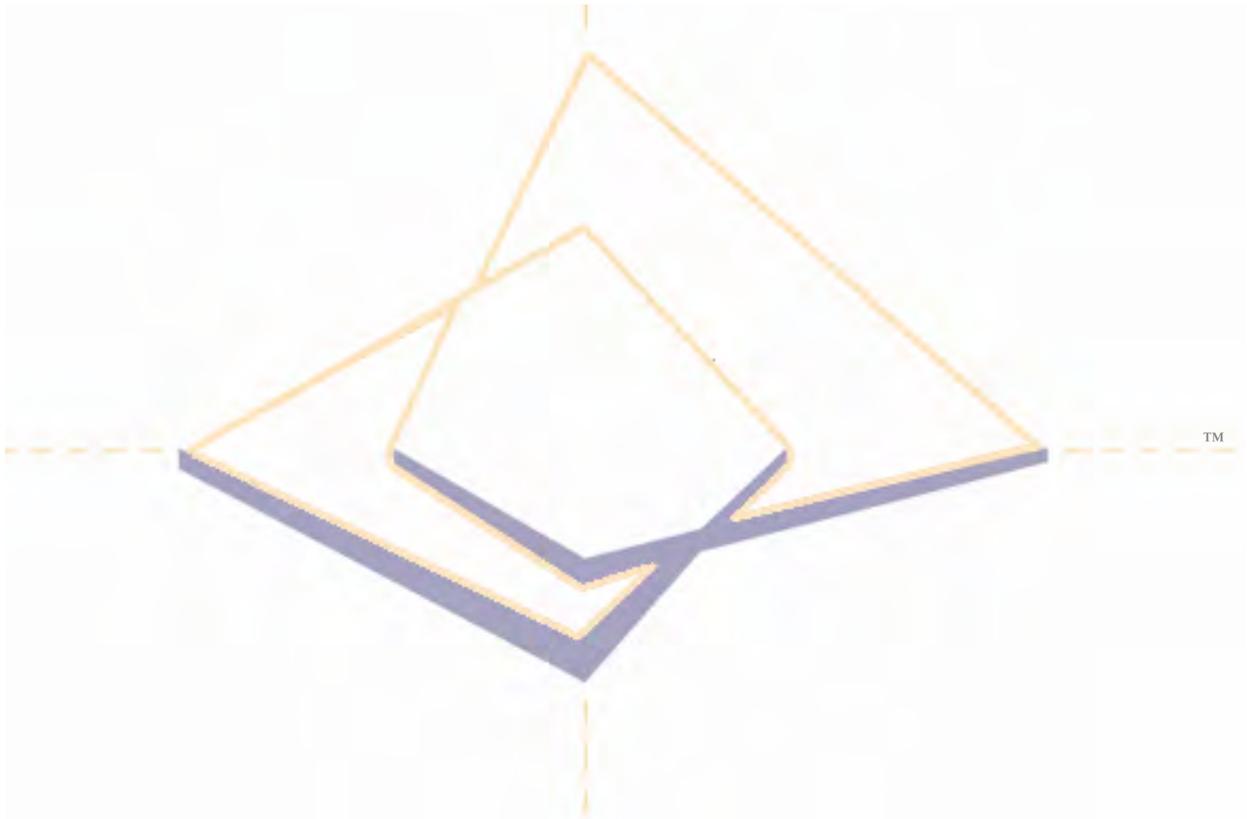


“I Opt”[®]

(Input Output Processing Template)

Advanced Leadership Report



This report has been prepared for:



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Advanced Leadership Report

Prepared for:

Date Prepared:

Thank you for completing the “I Opt” Survey. Your responses to the questionnaire have been tabulated and your own personal strategic style(s) has been identified.

Your answers indicate that you scored highest in the ranges of **Reactive Stimulator (RS)** and **Relational Innovator (RI)**, respectively. This report contains a sketch of the behavioral traits and preferences common to those styles. These styles describe the general preferences that a person uses to navigate life. These postures also affect the way they lead others.

This report concentrates on the leadership aspects of your approach. A leader is a person other people follow. Everyone has been, is, and will be a leader. Leadership skills are of universal value. However, the more you fill the role of leader, the more important it is for you to understand the differences between yourself and the people who you lead. This understanding allows you to frame your direction so that others are likely to move in the way that you intend.

The style classifications above are based on the scores calculated from the answers that you provided. The scores do **NOT** reflect nor predict your personality, ability, experience, or suitability for any particular role. They are simply a natural outcome of the way you process information. Any interpretation of this report should take into account ALL relevant input such as actual experience, skills, interests and abilities.

What did “I Opt” Measure?

The “I Opt” survey you took measures your way of processing information. To a large degree, this sets your behavior. In your case, you tend to favor the action-oriented RS style. Speed is a major feature of your approach. For example, you tend to focus on the central parts of an issue. You are able to rapidly figure out ways that the item can be resolved. You apply your solution quickly, and probably have a “stop loss” strategy available to use if your initiative fails.

Your strategy tends to flourish when you are given maximum freedom to investigate interesting options, explore unforeseen alternatives, and to take advantage of unexpected circumstances. This approach tends to prosper under rather “loose” leadership where only overall guidance, rather than specific direction, is provided. A loose form of leadership allows you to react quickly and gives you the opportunity to try out the methods that you think might work. The overall result is that you will be seen as a responsive leader.

If you are like most people, it is natural for you to lead in the way you like to be directed. Unfortunately, if you try to apply your primary strategy to others you are likely to have difficulty about 82% of the time. This is because only about 18% of the population shares your RS perspective. To be an effective leader you must guide people who use different information-processing strategies.

Like you, people using other strategies prosper in situations that let them maximize their own way of doing things. If you are to lead successfully, you will need to understand the strategy they are using. This tells you about their strengths and vulnerabilities (every strategy has both). Knowing this, you can design a way to achieve your objectives using the natural strengths of the people you are leading while avoiding their natural vulnerabilities.

There are always two sides to a leadership equation: the leader and the follower. Before you can effectively guide others, you must first understand the strengths and vulnerabilities of your own approach. This will allow you to leverage your abilities with the people you are leading.



Your Primary Leadership Style (Reactive Stimulator)

You choose to navigate life using an RS approach. It is likely that you place a high value on action. Your underlying driver is “doing things.” You probably measure your success by the volume of tasks completed and the speed at which they were done. These preferences are likely to find their way into your natural leadership style. For example:

SOME OF YOUR NATURAL LEADERSHIP TENDENCIES

- You are likely to be sensitive to transient opportunities.
This capitalizes on your quick reaction capabilities. You are likely to guide others toward taking advantage of what you see as a continuous opportunity stream.
- You are likely to be charismatic in approach (i.e., enthusiasm, emotion).
You are likely to eagerly grasp opportunities and pursue them aggressively. This creates an emotional momentum that is likely to be part of your leadership style.
- General direction and minimal detail are likely to feature in your leadership.
You have the capacity to work with explicit direction and detail but probably prefer to rely on broad direction and minimal specifics. You will probably expect others to be as versatile as you are.
- You will probably readily delegate authority and responsibility.
You are likely to delegate and then hold team members accountable for results delivered. You will probably intervene if results fall short of your expectations.
- You will probably be highly focused on results.
You tend to judge success by the quantity and speed that results are delivered. You are likely to guide your group toward a similar posture.

These leadership tendencies will work sometimes and fail others. Whether and how well they work will depend on:

1. The nature of the people you are trying to lead.

The higher the level of action in their profile, the greater will be your success. The lower the level, the more you will have to “bend” to meet their needs and preferences.

2. The nature of the task you are trying to address.

The more the task calls for rapid response and visible objectives, the more successful you are likely to be. The more the task requires careful study and complex assessments, the lower your success level will be.

Knowing your natural tendencies, and learning that they may not always be the right way to reach your objectives, is an early step in effective leadership.



Your Secondary Leadership Style (Relational Innovator)

There are times when your primary strategic style does not apply. In these situations you are likely to revert to your secondary preference, the Relational Innovator (RI) style. When this occurs, your interests and behaviors shift. Your focus moves from tangible achievements to ingenuity. Your attention centers on possibilities. You come to favor unique approaches with an opportunity for large-scale gains. Your underlying “driver” shifts from action to creativity.

The frequency in shifts between your dominant RS style and your secondary RI style is determined by (1) the situations you confront, and (2) the relative strength of the secondary style. In your case, shifts due to the relative strength of your secondary style will happen about 29% of the time. Your secondary preferences are likely to find their way into your natural leadership style. For example:

SOME OF YOUR SECONDARY LEADERSHIP TENDENCIES

- Your focus shifts from tactical actions to mission-level explorations.
You move from action to thought. You begin to guide your group toward new and unique ideas. The focus on immediate results diminishes.
- Your leadership approach moves to one of less intervention.
You are likely to continue to rely on delegation. However, you will probably take a more relaxed and collaborative approach.
- Your approach is likely to become more tolerant and less demanding.
Your direct and assertive approach characteristic of your primary style is likely to be replaced by a more “easy going” style. You will probably be less abrupt and more understanding when in this mode.
- You shift from experimental implementation to thoughtful exploration.
When in your primary style you tend to center quickly on things that might work. When you move to your secondary approach you begin to search for bigger and broader solutions.
- Your pace remains fast but is less focused on near-term results.
Your primary style centers on the need for action. With your secondary style comes an appreciation for creativity. This de-focuses you and opens you up to more options. You will probably expect the group you lead to sense this and change accordingly.

These and other changes are the result of your move from action (RS) to ideas (RI). This can happen without you even being aware of it. The people you lead, however, will be expected to conform to your new direction.



Your Leadership Style Themes

Your natural leadership tendencies will also work their way into your managerial practices. These are themes, conventions, and situations you establish as you guide a group of people over time. These are likely to include:

ENVIRONMENT: Leaders create an organizational climate. You are likely to lean toward free flowing structure targeted at hard, tangible results. Flexibility and responsiveness set within a relatively fluid framework will probably typify the tone of your ideal group.

PLANNING: You probably prefer tactical plans focused on specific near-term objectives. Mission-level (i.e., end purpose—e.g., what business should we enter?) plans are likely to be in evidence. Operational plans (i.e., “how-to” process specifications) may also be visible. Strategic plans (i.e., general directions to achieve distant objectives) are not likely to be used.

COORDINATION: You are likely to rely on informal methods such as chats, impromptu meetings, or spontaneous interventions to coordinate group activities. You probably will maintain some formal tools (e.g., status reports, activity counts, etc.) but not at excessive levels.

MOTIVATION: Intangible rewards (i.e., emotional rewards that depend on feelings—e.g., praise) will be visible, as will more tangible rewards (e.g., raises, bonuses, status symbols, etc.). Inter-personal initiatives (e.g., enthusiasm, conviction, excitement, etc.) are likely to be used to inspire effort. This balance is likely to cause you to be seen as “reasonable” in approach.

COMMUNICATION: You probably prefer an informal, relaxed approach. You are likely to focus on central concepts. You can also adopt a more formal posture focused on detailed explanations and explicit directions if required by the situation; however, the formal option is unlikely to be used extensively.

CONTROL: This is how you make sure things are going the way that you intended. You will probably assure yourself that the direction is right without delving into detail; however, you may intervene frequently to assure yourself that things are going as expected.

Like your personal preferences, the success of your managerial patterns will vary. They create both exposures and opportunities. If you recognize when these differing conditions are likely to arise, you can consciously adjust your behavior to better align yourself and your group to meet your objectives.

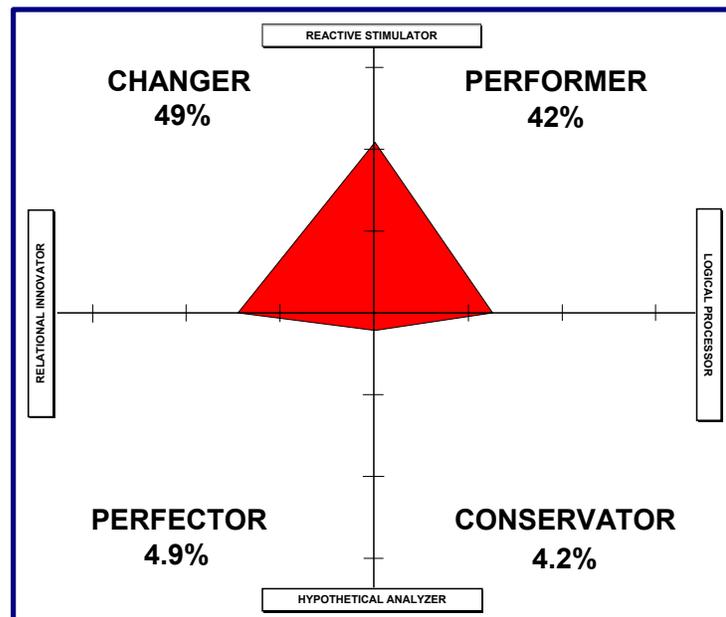


Your Leadership Pattern

You cannot be in both your primary and secondary style at the same time. It is either one or the other. For example, it is impossible to be both intense (RS) and relaxed (RI) at the same time. Rather, you shift between the styles depending on your interpretation of the circumstances.

Those you are leading must anticipate your likely direction. If they cannot, you will have created structural inefficiency. Everyone must wait for you to tell them which way to go. Productivity will be lost as they wait for your direction. If they guess wrong, they may have to redo work already done. This is a challenge to people looking to you for leadership.

People will try to figure out what you are likely to want by generalizing. They observe you over time and try to characterize your overall behavior. Your profile discloses the likely outcome of their assessment.



The people that you lead will see that your attention centers on the instant-action RS (top axis) style most of the time. When this style does not apply, your attention is most likely to shift to the idea-oriented RI (left axis) style. This generates a problem-solving pattern with a creative bent. Applying this pattern continuously creates a high change environment—the “Changer” pattern.



Your basic approach is described as the “Changer” pattern, but it is not your only option. About 42% of the time you will shift to the “Performer” pattern. This combines your fast acting RS style with your disciplined LP style. In this mode your attention centers on getting things done. The natural outcome of this process is tangible results others can see—a posture centered on performance.

There is also a chance that you may use the “Perfector” or “Conservator” patterns. This makes predicting your needs more difficult. However, preparing your group to anticipate your dominant and secondary styles will position them to “guess” your intentions right most of the time. Over time, the people you lead will see you as being interested in new ideas quickly applied. This will provide them with your basic direction. They will then try to figure out the conditions under which you deviate from this general preference.

Your group will eventually “figure you out,” but if you aid this process you can enjoy increased productivity at an earlier point. You can give this aid by explaining why you are choosing a particular course. This will notify people of the factors that you see as important. They will then be able to estimate your direction sooner and more accurately. Everyone wins.

As you explain the “why” of a particular choice, you will be referencing your overall goals. These are likely to center on fast paced, innovative problem solving. Whatever they are, you should make an effort to articulate them clearly. This will help the people in your group to refine their expectations. The improvement in accuracy will enhance their inherent productivity.

Each person has their own goals as well as those that they share with you. They also have preferred approaches that they would like to use. You can help to lessen the gap between you and them by explaining how your approach will benefit them.

If you are to enlist these other people, you will have to talk in their language—not yours. For example, use logic to explain things to the HA’s and allow them time for assessment. You will have to recognize these different preferences if you are to fully connect with your group.



Your Leadership Style Vulnerabilities

There is no such thing as a perfect leader. Any of the great leaders in history could be put into situations where their approach would fail. You are no different. A key to your success as a leader will lie in your ability to offset your vulnerabilities when you are placed in a situation where they become actual exposures. Some of the vulnerabilities that are inherent in your profile are:

FOCUS SHIFTS: Your strategy tends to capitalize on the ability to shift focus. In leadership situations you may have reason to intervene in group activities. When you do, there is a probability that you will contribute ideas and options that can defocus or distract group activities. Considering the effects of your initiatives on task completion would be wise.

ANALYSIS: Planning, assessments and evaluation are probably not your strong points. These activities typically do not involve action and you will probably find them to be a bit tedious. There are, however, situations where study and preparation pay high dividends. There is a probability that you may not recognize these situations as they arise.

DIRECTION: You may send contradictory signals to your group. In your “Changer” (RS/RI) mode you are likely to be open to options, more understanding and more willing to give your group latitude in choosing an approach. When you are in your “Performer” (RS/LP) mode you are likely to be highly focused, deeply involved, and command oriented. Signaling this change before it occurs could help improve group productivity.

DELEGATION: You tend to work best when given discretion. It is likely that you will expect others to welcome similar treatment. This may incline you to delegate too readily (e.g., to people who are not ready). Pausing before delegation may slow you down but could improve the odds of fully achieving an objective.

SPEED: You probably get major satisfaction from the speed at which you can work and the volume of items that you can resolve. This can be a good thing. However, if carried to an extreme it can cause you to be “out of phase” with other parts of the organization. It can also lead you to impose unreasonable deadlines on the members of your group. You may want to remain aware of this exposure and act to restrain it when it gets excessive.

STRATEGY: Your orientation is toward “doing” things. This tends to give a near-term framework to your thinking. Goals that involve longer-term sequences of activities may lie outside your zone of excellence.

ABRUPTNESS: Your focus on speed and volume can lead you to be a bit “short” in your interpersonal relations. This may limit the level of “natural” cooperation you will get from others.



Your Leadership Style Strengths

Offsetting vulnerabilities is one aspect of leadership success. Magnifying your strengths is the other. There are situations where your natural leadership tendencies will excel. It is to your advantage to arrange your affairs and those of your group to maximize the value that your preferred style contributes. Some of the strengths that you may want to leverage are:

PERFORMANCE ENVIRONMENTS: Your strategy is ideally suited to environments that put a high value on tangible outcomes. Intense situations with severe deadlines are likely to be your “natural” turf. Seeking out and placing yourself in these situations will allow your natural tendencies to have maximum positive effect.

FOCUS: It is likely that you will allocate your attention to items that are scheduled for near-term resolution. Concentrating on these items can give you an intense focus. This makes it unlikely that you will be easily diverted. The result is that you will probably not miss many deadlines associated with your commitments.

RESULTS: Your leadership style tends to generate a high volume of visible results. These are often based on highly creative solutions to the issues that you address. Your disciplined LP tendencies also give you the capacity to execute exacting procedures. Your RS abilities give you access to expedient solutions when needed. The net result is that, one way or another, things will get done.

CHARISMA: Your favored RS and RI capacities cause you to see few barriers that cannot be overcome. It is likely that your enthusiasm will rub off on those around you. While unlikely that this will be carried to an extreme, your energy will probably be picked up by your group.

RISK TAKING: Used inappropriately, risk-taking behavior is a vulnerability. Used judiciously it is a strength since it allows you to move confidently even without full knowledge of the ultimate outcome.

DIRECTION: Your focus on delivering tangible results means that you can be depended upon by others who must coordinate their actions with yours. This means that there is little chance that productivity will be lost as a result of people misjudging your likely course on future events.

RANGE: Your willingness to take instant action and ability to generate new ideas and options, as well as your talent in executing defined procedures means that you can address a wide range of issues. This versatility can be a major asset if placed in a setting where a diversity of issues is regularly present.



Leading Individual Members of Your Group

Regardless of your approach, there will be some people in your group that you “mesh” with better than others. Your effectiveness as a leader will not depend on how well you mesh with your natural allies. Rather, it will be determined by your ability to guide those who think differently than you.

Leading an RS

You can recognize the RS by their direct, positive, and straightforward approach with a focus on “doing” something. They tend to move fast and decisively. You can best lead the RS by framing your direction in short, action-oriented terms. Break up longer-term jobs into pieces and deliver them sequentially. This strategy is natural to you and you will probably not have much difficulty with people who subscribe to this approach.

Leading an LP

You can recognize the LP by their high commitment and task-oriented approach. They tend to move at a steady, deliberate pace. There is some basis of mutual appreciation between you and the LP. You both value action. However, how you go about it is very different. To improve your “connection,” frame your direction in logical, fact-based terms. Restrain your tendency to bring in emotion (e.g., excitement, enthusiasm, etc.). Allow more time than you believe necessary to examine the topic of direction.

Leading an HA

You can recognize the HA by their patient, unhurried, and relaxed approach. The HA will be interested, ask many questions, and will appear warm and supportive. You are likely to see merit in the HA. They will take your ideas seriously and are likely to offer insightful observations. The difficulty you may face is their reluctance to take action as fast as you like. The HA tends to be risk averse and are uncomfortable if forced to move before they are “ready.” You will probably need to use deadlines to ensure that they are aligned with your sense of appropriate timing.

Leading an RI

You can recognize the RI by their frequent use of analogies, a dislike of detail, obvious enthusiasm, and a steady flow of new ideas. You have a natural affinity to the RI since they share your secondary style. However, they may tend to wander into areas that may not be the topic of your interest. You should probably be prepared to periodically refocus them. This will not be a difficult problem for you but neglecting it could lead to some loss of productivity.

Focusing on your group members’ dominant styles will help your leadership efforts, but it is not everything. Like you, group members have access to multiple styles. Over time you will figure them out. This will give you a head start.



Leading Your Group as a Whole

If you are like most people, you will direct others the way you want to be lead. You will want to concentrate on the central elements of an issue. Your direction will be delivered rapidly and with minimal specification. You are probably easily diverted and may be a bit eclectic in giving directions.

There will be people who respond favorably to your approach. It is easy to focus on these individuals and ignore those less receptive. If you follow this approach you can expect to “miss” about 62% of an average group.

Like individuals, groups have strategic profiles. This profile is only obtainable using “I Opt” group analysis technology. However, you can estimate it by counting the dominant strategy of each member of the group. The strategy used by the most people will roughly approximate the group’s character.

Leading an RS Group

Be short, direct and to the point. Avoid elaborate explanations. Frame your guidance in terms of actionable directions. Project emotions in voice variation and body language. Keep meetings as short as possible. If you follow your instincts it is likely you will connect with groups of this nature.

Leading an HA Group

Use a logical, internally consistent format. Offer procedural insights (i.e., the processes you used to arrive at your position). Outline the long-term effects of your direction. Sketch the options that you considered and the reasoning for your choice. Schedule long sessions and be prepared for civil skepticism.

Leading an LP Group

Provide specific operational details. Justify your positions and identify the benefits. Use a logical, internally consistent format. Deliver in a factual, objective manner. Give your direction in near-term, actionable terms. Schedule long sessions and be prepared for a skeptical reception.

Leading an RI Group

You can connect with an RI group by using a lot of analogies (i.e., “It’s just like . . .”) and comparisons. They will be comfortable with your natural pace and do not need nor want a lot of detail.

If more than one strategy is strongly represented in your group, you will need to balance your approach between them. These suggestions will help you direct your group in a way that is most likely to give you the results you want. As a leader you are after results, not total conformity to your way of doing things.



Followership

In all likelihood you are part of a complex organization. Unless you are the CEO, you probably report to someone. All of you are bound together in a web. The threads of this web are common purpose (the success of the entity for whom you work) and common destiny (the rewards and/or penalties that flow from success or failure).

Followership involves balancing independent and coordinated stances. Either posture is bad if carried to an extreme. For example, a “loose cannon” is a person who optimizes only themselves or their local group. They do not consider the effects on the larger group. From their local perspective, they look and feel good. Much has been accomplished. Any negative effects on the larger group are ignored. “Loose cannons” are destined for failure. The only question is when.

Followership is also not “blind obedience.” This work-to-the-rules tactic is a standard way to bring an organization to its knees. It capitalizes on the fact that the leader never has all of the information available at the lower levels. To one degree or another, a “blind obedience” followership strategy will fail. Again, the only question is when.

Complete autonomy (“loose cannon”) and complete compliance (“blind obedience”) can be seen as opposite sides of a continuum. The “right” way to follow lies somewhere between these extremes. The exact point on the continuum will vary depending on:

- 1. Role Difference:** The more your role differs from that of your leader, the more you should shift to the autonomy end of the continuum. The difference in roles means that both of you are covering different bases. Overtaxing your leader with the demands of your role subtracts from the time he or she can devote to other role(s).

For example, if you head a function that reports to the CEO you should expect to exhibit a great deal of autonomy. The CEO can only direct and coordinate your activities at the most general of levels.

If, on the other hand, you report to a supervisor who manages four other people doing roughly the same task, you should shift towards the compliance end of the spectrum. In this situation, coordination is your leader’s primary role. The similarity in role content means that you will not overtax your leader. Your information “fits” easily into other things that he or she knows. The larger organization benefits from the improved coordination.



Followership (Continued)

2. **Profile Fit:** Like you, your leader has a profile that describes how he/she wants to process information. The “fit” between your leader’s profile and yours influences your positioning on the autonomy/compliance continuum.

Generally, the lower the overlap between your profile and that of your leader the more you should shift toward compliance. The leader is “seeing” things through different lenses than you. This different perspective is being used on issues outside your scope of responsibility. Attempting to apply your preferences independently can cause your leader’s larger scale efforts to suffer.

The higher the overlap between your profile and that of your leader, the more you can shift toward autonomy. A common perspective increases the odds that your decisions will be acceptable to your leader. Since most decisions will be acceptable, there is no need to incur the cost of coordination.

The combination of role differences and profile fit identifies the optimal location on the autonomy/compliance continuum. No position is better or worse than another. The location is not a judgment of your worth. It is merely the position that best serves the interests of both you and the larger organization. There is no formula for the exact spot to locate yourself, but knowing the factors that go into it can help guide you in the right direction.

Your profile does, however, suggest some general exposures that may apply to any leader with whom you work. These include:

- **Patience:** You are likely to see the potential gains from your ideas vividly. You are likely to have a plan to realize this gain almost as soon as you have the idea. Your leader may see the possibilities in a different light. Pushing too hard can cause your leader to withdraw.
- **Analysis:** Your action orientation may cause you to undervalue the need to study issues. This can be risky where the cost of failure is high. Your abilities in analysis and detail may be a bit overwhelmed by your interest in speedy results. A bit of care may be in order.
- **Volume:** You are likely to have many “balls in the air” at the same time. This can introduce complexity that your leader may not be able to fully absorb. You may want to restrict yourself to reviewing items that are relatively certain or of potentially high importance.
- **Range:** You are likely to respond to any opportunity that passes. This can cause you to be seen as being a bit too focused on the immediate issues. Taking a greater interest in some longer range strategic issues could help project an image of being more strategically versatile.



Normative Leadership Models

There are thousands of books offering advice on leadership. These are “normative” models. They describe what “should” be done to meet the standards of a particular group. They distill the leadership practices common to leaders in a specific area. These are then condensed into “principles” that become the backbone of a book or program.

You will probably be exposed to one of these leadership models. The analysis and recommendations in this report are compatible with all of them. What you learned in this report was process. This additional material will add content.

How to use this Report

Leadership is a serious responsibility. Your career will be influenced by how well you are able to lead others. The lives of the people who you lead will be affected by your skill. It is in your interest and theirs to invest in developing your skills to as high of a level as you can.

This report has identified the natural leadership strengths and inclinations inherent in your approach. You can use this knowledge to help position yourself into areas where your approach is a natural fit. In your case, areas that allow you freedom of action and that are focused on tangible results would be close to ideal.

The report has also identified some of your leadership vulnerabilities. You can use this knowledge to avoid situations where these can become exposures. If they cannot be avoided, this report gives you strategies that you can use to offset their effects. Many of your vulnerabilities are consequences of your ideas, results posture, and the speed at which you act. Focusing on reducing these exposures will go far toward improving your situation as well as the situation of those around you.

Finally, the report linked your leadership in with that of the people who are leading you. This places your contribution in a larger context. Your leader is going to influence your career and that of the people who you lead. If you can integrate your leadership with theirs you will not only advance the larger organization but also your personal position within it. Paying attention to your natural vulnerabilities in this area can help to create a win-win situation for all involved.

