

Exercise Worksheet

Rank and Time Percent For CEO Job Accountabilities

Based on YOUR organization's needs, prioritize the four common CEO accountabilities. After prioritizing, assign the estimated time percentage you would expect the CEO to spend in the four accountabilities – the percentages must add up to 100%.

Accountability	Strategic Priority	Time Percent
Talent Management – Leadership, development		
Operational Oversight – Problem resolution, systems, efficiencies, product development		
Business Development – Sales, customer interactions		
Strategic Directions – Determine and guide organization's strategy and initiatives		

Assign Behavior Style Scores For CEO Job

Based on the accountabilities above, the assigned priority, and the estimated time spent in each accountability, assign a score for each behavior style ranging from 1 to 100. Total of all four dimensions should be less than 225.

	Dominance	Influence	Steadiness	Compliance
100	Aggressive	Magnetic	Stoic	Exacting
75	Driving	Gabby	Passive	Organized
60	Ambitious	Trusting	Steady	Bal Judgment
40	Attentive	Reflective	Flexible	Entrepreneurial
25	Cautious	Reluctant	Restless	Challenging
1	Apprehensive	Pessimistic	Scattered	Rule Oblivious
Score				

Rank Culture/Motivator/Values For CEO Job

Based on the accountabilities above, the assigned priority, and the estimated time spent in each accountability, rank each behavior style from 1 to 6.

Motivator	Strong	Average	Weak	Rank
Rank	1 or 2	3 or 4	5 or 6	1 - 6
Aesthetic – Value balance in their lives, creative self-expression, beauty and nature.	The job's actions are driven by a passion for form, harmony, and beauty within and without extending to possessions and surroundings. The concern for environment is very strong.	The job's passion for form harmony, and beauty are situational, and do not extend to the totality of the job.	The job may be negative or indifferent to the Aesthetic point of view.	
Individualistic – Value personal recognition, freedom, and control over their own destiny and others.	The job requires leadership and a passion to control its destiny and the direction of others.	The job requires leadership in specific situations. There is not a passion to control all situations.	The job reacts negatively to situations requiring strong control. Power is discouraged.	
Social – Value opportunities to be of service to others and contribute to the progress and well being of society.	The job has a passion to better humanity, to invest time, talents, and resources in helping the world become a better place. Tremendous fulfillment is felt from the pursuit of social activities.	The job has a passion to assist others only situationally, under given conditions and circumstances.	The job may react negatively to social causes believing them to be a waste of resources and time.	
Theoretical –Value knowledge for knowledge's sake, continuing education and intellectual growth.	The job requires a passion for knowledge and the discovery of truth.	The job requires a situational drive for knowledge and truth; in-depth learning is required for specific topics.	The job is either negative or indifferent to knowledge and discovery of truth. Facts are uninteresting and the desire to learn is highly situational.	
Traditional – Value traditions inherent in social structure, rules, regulations and principles.	Job believes in a systematic approach or a "rule book" for getting things done. Approaches that do not fit into the "system" will tend to be rejected.	The job does not have a set systematic approach but may need systems or stringent approaches.	The job may react negatively to situations requiring a structured or systematic approach.	
Utilitarian – Value practical accomplishments, results and rewards for their investment of time, resources and energy.	The job's actions are driven by investment and return of time, talent, or resources. Investment, utility, and practicality are important.	The job may be practical situationally, looking for return on investment only in specific arenas. There lacks a passion for investment.	The job may react negatively when someone seeks return of investment, or may be indifferent and not care.	

Score Personal Skills For CEO Job

Based on the job accountabilities, the assigned priority, and the estimated time spent in each accountability, assign a three minimum scores 7.5 and three 6.5

Personal Skill	Score
Developing Others – The ability to contribute to the growth and development of others.	
Empathetic Outlook – The ability to perceive and understand the feelings and attitudes of others.	
Leading Others – The ability to organize and motivate people to accomplish goals while creating a sense of order and direction.	
Personal Accountability – A measure of the capacity to be answerable for personal actions.	
Problem Solving – The ability to identify key components of a problem to formulate a solution or solutions.	
Results Orientation – The ability to identify actions necessary to complete tasks and obtain results.	

Job Comparison Worksheet

Behaviors

Enter the Job score from the Job Behavior Style determined in prior exercise. Enter your Self scores from your TriMetrix Personal Report; results are on the last page. The scale is from 1 to 100.

Style	Job	Mark	Jeff	Self
Dominance – How one handles problems and challenges		25	95	
Influence – How one handles people and influence others		20	85	
Steadiness – How one handles change and paces oneself		90	15	
Compliance – How one sees/handles rules and procedures set by others		85	10	

Motivators

Enter the Job rank from the Cultural/Motivators determined in prior exercise.. Enter your Self rank from your TriMetrix Personal Report; results are on the last page. The rank is from 1 to 6.

Motivator	Job	Mark	Jeff	Self
Aesthetic – Value balance in their lives, creative self-expression, beauty and nature.		6	3	
Individualistic - Value personal recognition, freedom, and control over their own destiny and others.		4	2	
Social – Value opportunities to be of service to others and contribute to the progress and well being of society.		2	6	
Theoretical – Value knowledge for knowledge's sake, continuing education and intellectual growth.		1	4	
Traditional – Value traditions inherent in social structure, rules, regulations and principles.		3	5	
Utilitarian – Value practical accomplishments, results and rewards for their investment of time, resources and energy.		5	1	

Personal/Soft Skills

Enter the Job rank from the Personal Skills determined in prior exercise.. Enter your Self score from your TriMetrix Personal Report; results are on the Core Skills Report (7 pages from the end).

Personal Skill	Job	Mark	Jeff	Self
Developing Others – The ability to contribute to the growth and development of others.		9.0	8.3	
Empathetic Outlook – The ability to perceive and understand the feelings and attitudes of others.		8.8	9.6	
Leading Others – The ability to organize and motivate people to accomplish goals while creating a sense of order and direction.		8.7	8.3	
Personal Accountability – A measure of the capacity to be answerable for personal actions.		8.1	6.9	
Problem Solving – The ability to identify key components of a problem to formulate a solution or solutions.		8.5	8.4	
Results Orientation – The ability to identify actions necessary to complete tasks and obtain results.		8.0	8.1	

ABC Company – VP, Sales Accountabilities

Accountability	Priority	Percent Time	Success Factors
Talent Management <ul style="list-style-type: none"> • Coach/Develop/Mentor • Build team and bench • Conduct regular one-on-ones • Development and succession plans for direct reports • Conduct quarterly performance reviews • Ride-alongs with direct reports • Personal development 	1	30%	<ul style="list-style-type: none"> • Demonstrated positive team interactions • Team member goals met • Team members demonstrate core values • Zero avoidable turnover of "A" players • Demonstrated team member growth • Quarterly reviews conducted and documented timely • Successful new hires; become "A" players • Personal development plan achieved
Sales Management <ul style="list-style-type: none"> • Develop and implement (teach) sales process • Problem solve sales issues • Create and develop sales channels • Strategic sales planning • Support sales team (remove obstacles, provide resources) • Develop prospect plans and strategies 	2	25%	<ul style="list-style-type: none"> • Develop sales strategy plan • Increase consulting to 401k sales ratio • Achieve sales goals • Incentive plans aligned with strategic sales plan
Marketing Management <ul style="list-style-type: none"> • Manage messages; strategies • COI management • Nurture leads; getting leads sales ready • Identify new partners • Support marketing team (remove obstacles, provide resources) 	3	20%	<ul style="list-style-type: none"> • Develop marketing plans • Lead targets achieved • COI lead targets achieved • Demonstrated client and internal message awareness
Customer Retention Management <ul style="list-style-type: none"> • Support CRM team (remove obstacles, provide resources) • Select client ownership • Develop retention plans and strategies • Oversee processes • Vendor/Partner Program management 	4	15%	<ul style="list-style-type: none"> • Increased clients' view of FOF as "partners" • Client retention plans in place • Measured success in Partner Program
Executive and General Administrative Activities <ul style="list-style-type: none"> • Budgeting • Business strategic planning • Work with peers and departments • Coordinate group activity • Executive/management team member • Executive team rock ownership • Work with CRM system (Net Suite) • Coordinate activity and KPI reports 	5	10%	<ul style="list-style-type: none"> • Positive team member feedback • Positive management feedback • Expenses within budget • Reports meaningful, timely, and accurate



ABC Company – VP, Sales Profile

Accomplishments

Very Important Personal Skills

- **Personal Accountability** - The ability to be responsible for the consequences of one's own actions and decisions: taking responsibility for these decisions and not shifting focus or blame or poor performance somewhere else or on others.
- **Results Orientation** - The ability to identify actions necessary to achieve task completion and to obtain results: the ability to meet schedules, deadlines, quotas, and performance goals.
- **Accountability For Others** - Being responsible for the consequences of the actions of those whom you manage.
- **Developing Others** - The ability to understand the needs, interests, strengths, and weaknesses of others, and to utilize this information for contributing to the growth and development of others.
- **Leading Others** - The ability to organize and motivate people to accomplish goals while creating a sense of order and direction.
- **Influencing Others** - The ability to: personally affect others' actions, decisions, opinions or thinking; instill a sense of value for the task at hand; develop and invoke a self-starting attitude in others; understand the needs and desires of others.
- **Decision Making** - The ability to: analyze all aspects of a situation to gain thorough insight to make decisions; identify and evaluate resources; apply problem solving abilities; develop an inner strength; be objective and fairly evaluate the different aspects of a situation.
- **Planning And Organization** - The ability to: establish a process for activities that lead to the implementation of systems, procedures or outcomes; identify long range goals and design plans to attain them; understand the needs of a situation and establish effective action plans; evaluate future implications of current decisions and actions.

Date:

Talent Management

Sales Management

Marketing Management

Customer Retention Management

Executive and General Administrative Activities

Preferred DISC Approach

D High Dominance	Value To The Team: <ul style="list-style-type: none"> • Bottom-line organizer • Forward-looking • Challenge-oriented • Initiates activity • Innovative 	Tendency Under Stress: <ul style="list-style-type: none"> • Demanding • Nervy • Aggressive • Egotistical 	I High Influence	Value To The Team: <ul style="list-style-type: none"> • Optimism and enthusiasm • Creative problem solving • Motivates others toward goals • Team player • Negotiates conflicts 	Tendency Under Stress: <ul style="list-style-type: none"> • Self-promoting • Overly optimistic • Gabby • Unrealistic
DESCRIPTORS: <ul style="list-style-type: none"> • Adventurouse • Competitive • Daring • Decisive • Direct • Innovative • Persistent • Problem Solver • Result-oriented • Self-starter 	Ideal Environment: <ul style="list-style-type: none"> • Freedom from controls, supervision and details • An innovative and futuristic-oriented environment • Forum to express ideas and viewpoints • Non-routine work • Work with challenge and opportunity 	Possible Limitations <ul style="list-style-type: none"> • Overuse of position • Set standards too high • Lack tact and diplomacy • Take on too much, too soon, too fast 	DESCRIPTORS: <ul style="list-style-type: none"> • Charming • Confident • Convincing • Enthusiastic • Inspiring • Optimistic • Persuasive • Popular • Sociable • Trusting 	Ideal Environment: <ul style="list-style-type: none"> • High degree of people contacts • Freedom from control and detail • Freedom of movement • Forum for ideas to be heard • Democratic supervisor with whom he can associate 	Possible Limitations <ul style="list-style-type: none"> • Inattentive to details • Be unrealistic in appraising people • Trust people indiscriminately • Situational listener
		Emotion Of The High D: Anger			Emotion Of The High I: Optimism
S Low Steadiness	Value To The Team: <ul style="list-style-type: none"> • Thrives on multi-tasking • Shifts gears easily • Change Agent • Responsive to urgencies • Great initiator 	Tendency Under Stress: <ul style="list-style-type: none"> • Inaccurate • Scattered • Inattentive • Forgetful 	C Low Compliance	Value To The Team: <ul style="list-style-type: none"> • Challenges status quo • Identifies creative solutions • Pushes tolerance levels • Innovative • Thrives on brainstorming 	Tendency Under Stress: <ul style="list-style-type: none"> • Rule-resistant • Critical • Careless with details • Arbitrary
DESCRIPTORS: <ul style="list-style-type: none"> • Flexible • Eager • Responsive • Impatient • Restless • Variety-oriented • Pressure-Oriented • Spontaneous • Energetic • Excitable 	Ideal Environment: <ul style="list-style-type: none"> • Freedom from routine work • Variety in pace and task • Ability to hand off project at implementation • Loose deadlines • Opportunity to change and grow rapidly 	Possible Limitations <ul style="list-style-type: none"> • Dangerously on time • Seeing projects through to fruition • Dislike of mundane • Impatience dealing with more exacting teammates 	DESCRIPTORS: <ul style="list-style-type: none"> • Inquisitive • Entrepreneurial • Creative • Resourceful • Uninhibited • Daring • Independent • Unrestrained • Self-willed • Innovative 	Ideal Environment: <ul style="list-style-type: none"> • Where creative thinking is needed • Freedom from excessive details • Forum to voice ideas • Opportunities for adventure • Freedom to try new approaches 	Possible Limitations <ul style="list-style-type: none"> • Unsystematic • Inattentive to details • Low appreciation for history • or proven approaches • Impatient with status quo
		Emotion Of The High S: Emotion			Emotion Of The Low C: Adventurous

Preferred Workplace Motivators

Utilitarian Motivator	Goal: To discover utility and what is useful or practical.
Focus On: <ul style="list-style-type: none"> • Return on an investment of time, energy or money 	Value To Team: <ul style="list-style-type: none"> • Practicality in all areas of life • Utilizing resources to accomplish results • Gaining a measurable return on all investments • Creative application of resources • Producing goods, materials, services and marketing them for economic gain • Capitalism
Basic Attitude: <p>Investments made will have a greater return in time and resources.</p>	Tendency Under Stress: <ul style="list-style-type: none"> • Workaholic • Self-preservation; little or no concern for others • Wasted resources, time materials and/or services • Investments with inadequate or no return
Theoretical Motivator	Goal: Discovery of truth and knowledge
Focus On: <ul style="list-style-type: none"> • Discovery of Truth and Knowledge • Solving a problem • Hard, cold facts and research 	Value To Team: <ul style="list-style-type: none"> • Solving problems • Objectivity in all areas • Identifying, differentiating, generalizing, systemizing • Pursuit of knowledge, identifying truth and untruth • Knowledge for sake of knowing
Basic Attitude: <p>Use cognitive ability to understand, discover, and systemize the truth.</p>	Tendency Under Stress: <ul style="list-style-type: none"> • Pursuit of knowledge is so primary that practical matters are neglected or ignored (home, family, children, money) • Discovery of truth may be placed higher than personal safety • Inability to know, learn or discover • Emotional, subjective experience with no rational justification