

Taking Your Leadership and Managerial Abilities to the Next Levels: A Self-Assessment

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“The spirit of self-help is the root of all genuine growth in the individual.”
~ Samuel Smiles, 1859 ~

Benefits. Doing this assessment and development plan can help you to:

- name the management and leadership strengths you have and the abilities you want to develop further
- explore and use a range of ways to develop specific abilities
- create a manageable, inspiring process for your practice and progress
- assist individuals, groups, and organizations to improve performance and outcomes
- obtain information for considering, doing, and responding to 360 degree assessments and other kinds of feedback

Since management and leadership abilities often overlap and reinforce one another, they are listed together. However, there are important differences. Effective leaders tend to focus on inspiring others and influencing the big picture in the present and for the future. Effective managers may do this as well, but they are more focused on getting the work done through others, often on a daily basis.

Make this process as easy and productive as possible. I hope you won't feel daunted by the long list of abilities below. Many are mutually invigorating. Many you have already. Though many are easy to develop further, some require consistent commitment. And many may not relate to your current situation or what you want to do in the future. So, edit any you wish and choose your priorities for attention that serve your interests and those of your colleagues.

Doing your self-assessment is not as time-consuming as you may anticipate. People who have used it say it takes under 15 minutes to work through the list. Based on your choices and work style, organizing for action by creating your development plan could take less than 45 minutes.

Just indicate your first reactions rather than over think your responses. Initial

responses are often the most authentic and useful.

Your Assessment. For each ability listed below, you'll see a scale of 1 to 5 (highest) at the left.

- Circle the number that reflects your current level of mastery, based on how you perform in supportive or at least neutral situations. Be generous rather than hard on yourself in your self-evaluations.
- Feel free to change any description to suit your style, values, and context.
- Add abilities that are not listed in the spaces provided at the end of each grouping.

Working with people

- | | | |
|-----------|-----|---|
| 1 2 3 4 5 | 1. | Adapting interpersonal skills to particular situations and people, while remaining true to self |
| 1 2 3 4 5 | 2. | Being available and responsive to supervisors |
| 1 2 3 4 5 | 3. | Being available and responsive to colleagues |
| 1 2 3 4 5 | 4. | Being available and responsive to subordinates |
| 1 2 3 4 5 | 5. | Being available and responsive to clients/customers/stakeholders |
| 1 2 3 4 5 | 6. | Encouraging and maintaining teamwork |
| 1 2 3 4 5 | 7. | Encouraging and maintaining coordination with other work groups |
| 1 2 3 4 5 | 8. | Coaching and developing others |
| 1 2 3 4 5 | 9. | Noting and interpreting verbal and nonverbal information |
| 1 2 3 4 5 | 10. | Involving others in creating goals and objectives |
| 1 2 3 4 5 | 11. | Facilitating group discussion |
| 1 2 3 4 5 | 12. | Delegating and sharing power |
| 1 2 3 4 5 | 13. | Providing regular, useful, concrete feedback to others on their work |
| 1 2 3 4 5 | 14. | Inspiring trust and respect in subordinates |
| 1 2 3 4 5 | 15. | Understanding and respecting different cultures, preferences, generations, and beliefs |
| 1 2 3 4 5 | 16. | Honoring differences in work styles that are effective and adjusting your own to support mutually beneficial outcomes |
| 1 2 3 4 5 | 17. | Sharing information and ideas |
| 1 2 3 4 5 | 18. | Managing human resources |

- | | | |
|-----------|-----|---|
| 1 2 3 4 5 | 19. | Understanding how rushing others and piling on work without regard to priorities affect motivation, relationships, and outcomes |
| 1 2 3 4 5 | 20. | Developing and maintaining productive relationships with relevant people outside the organization |
| 1 2 3 4 5 | 21. | _____ |
| 1 2 3 4 5 | 22. | _____ |
| 1 2 3 4 5 | 23. | _____ |

Working with ideas, information, and resources

- | | | |
|-----------|------|---|
| 1 2 3 4 5 | 24 . | Managing useful information about past, current, and future work |
| 1 2 3 4 5 | 25. | Maintaining, deepening, and testing subject matter expertise |
| 1 2 3 4 5 | 26. | Understanding subjects and issues outside immediate functions and their connections to organization purpose |
| 1 2 3 4 5 | 27. | Writing appropriate to goals, recipients, and situation |
| 1 2 3 4 5 | 28. | Communicating useful information and ideas in conversation |
| 1 2 3 4 5 | 29. | Speaking publicly |
| 1 2 3 4 5 | 30. | Analyzing information and other data |
| 1 2 3 4 5 | 31. | Synthesizing information from disparate sources |
| 1 2 3 4 5 | 32. | Thinking critically |
| 1 2 3 4 5 | 33. | Distinguishing between big picture and details |
| 1 2 3 4 5 | 34. | Using time and other resources effectively |
| 1 2 3 4 5 | 35. | Demonstrating how to use meetings for true problem solving and decision making |
| 1 2 3 4 5 | 36. | _____ |
| 1 2 3 4 5 | 37. | _____ |
| 1 2 3 4 5 | 38. | _____ |

Working with things, products and services

- | | | |
|-----------|-----|--|
| 1 2 3 4 5 | 39. | Using and expanding technical skills related to work |
| 1 2 3 4 5 | 40. | Using administrative skills to support goals and objectives |
| 1 2 3 4 5 | 41. | Maintaining and expanding knowledge of products and services |

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|-----------|-----|--|
| 1 2 3 4 5 | 42. | Knowing about comparable and complementary products and services provided by others |
| 1 2 3 4 5 | 43. | Exploring how to improve and expand successful products and services as well as identifying what to let go |
| 1 2 3 4 5 | 44. | Developing new, effective products and services |
| 1 2 3 4 5 | 45. | _____ |
| 1 2 3 4 5 | 46. | _____ |
| 1 2 3 4 5 | 47. | _____ |

Taking goal-related action

- | | | |
|-----------|-----|--|
| 1 2 3 4 5 | 48. | Planning |
| 1 2 3 4 5 | 49. | Anticipating short-term problems and issues |
| 1 2 3 4 5 | 50. | Planning strategically |
| 1 2 3 4 5 | 51. | Determining and meeting priorities |
| 1 2 3 4 5 | 52. | Achieving agreed-upon organizational goals |
| 1 2 3 4 5 | 53. | Completing tasks and projects in timely ways |
| 1 2 3 4 5 | 54. | Supporting organizational mission |
| 1 2 3 4 5 | 55. | Encouraging and leading new directions |
| 1 2 3 4 5 | 56. | Establishing and maintaining performance standards in concert with people responsible for meeting them |
| 1 2 3 4 5 | 57. | Giving timely, fair-minded evaluations based on agreed-upon goals |
| 1 2 3 4 5 | 58. | Resolving conflict by finding common ground and negotiating |
| 1 2 3 4 5 | 59. | Mediating |
| 1 2 3 4 5 | 60. | Solving or at least ameliorating problems |
| 1 2 3 4 5 | 61. | Creating coalitions and collaborations within the organization |
| 1 2 3 4 5 | 62. | Creating coalitions and collaborations among organizations, building trust with outside groups |
| 1 2 3 4 5 | 63. | Developing a vision for future work and goals with others |
| 1 2 3 4 5 | 64. | Anticipating influences on and changes in the big picture |
| 1 2 3 4 5 | 65. | Addressing what seems impossible with an open mind and imagination |

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| 1 2 3 4 5 | 66. | Transferring knowledge and skills, preparing for succession |
| 1 2 3 4 5 | 67. | Cross-training |
| 1 2 3 4 5 | 68. | Leading meetings that use time well and meet goals |
| 1 2 3 4 5 | 69. | Discussing and updating regularly concrete, mutual expectations about work |
| 1 2 3 4 5 | 70. | Setting and maintaining appropriate, effective boundaries in work relationships, processes and designs |
| 1 2 3 4 5 | 71. | Addressing frankly, concretely, and helpfully shortfalls in the performance of people and projects |
| 1 2 3 4 5 | 72. | _____ |
| 1 2 3 4 5 | 73. | _____ |
| 1 2 3 4 5 | 74. | _____ |

Enhancing professional qualities and behavior

- | | | |
|-----------|-----|---|
| 1 2 3 4 5 | 75. | Demonstrating presence and well-founded confidence |
| 1 2 3 4 5 | 76. | Taking responsibility for behavior and actions |
| 1 2 3 4 5 | 77. | Being accountable for results |
| 1 2 3 4 5 | 78. | Sustaining emotional balance and control |
| 1 2 3 4 5 | 79. | Demonstrating ethical conduct and personal integrity in behavior and actions |
| 1 2 3 4 5 | 80. | Being honest with self and others |
| 1 2 3 4 5 | 81. | Eliciting, listening to, and applying judiciously assessment results and feedback from others |
| 1 2 3 4 5 | 82. | Being decisive in well-supported ways |
| 1 2 3 4 5 | 83. | Managing stress effectively |
| 1 2 3 4 5 | 84. | Sustaining physical energy and good health |
| 1 2 3 4 5 | 85. | Being courageous; taking appropriate risks |
| 1 2 3 4 5 | 86. | Expressing creativity, resourcefulness, innovativeness |
| 1 2 3 4 5 | 87. | Using entrepreneurial instincts and skills |
| 1 2 3 4 5 | 88. | Demonstrating fairness |
| 1 2 3 4 5 | 89. | Being adaptable and flexible while honoring own values |

| | | |
|-----------|------|---|
| 1 2 3 4 5 | 90. | Integrating intuition in decision making and action |
| 1 2 3 4 5 | 91. | Attending to authentic proportion in work and other important aspects of life |
| 1 2 3 4 5 | 92. | Demonstrating curiosity about new ideas, processes, and information |
| 1 2 3 4 5 | 93. | Using political savvy |
| 1 2 3 4 5 | 94. | Expressing appropriate sense of humor with relevance |
| 1 2 3 4 5 | 95. | Being kind and considerate of others |
| 1 2 3 4 5 | 96. | Continuing to learn in own field, related areas, and beyond |
| 1 2 3 4 5 | 97. | Learning from mistakes to improve approaches |
| 1 2 3 4 5 | 98. | _____ |
| 1 2 3 4 5 | 99. | _____ |
| 1 2 3 4 5 | 100. | _____ |

Appreciate your strengths:

- Highlight all abilities that you labeled 4 or 5.
- Check any you want to take to level 5.
- Look for common themes among your abilities such as intellectual capacities or communication processes as a way of synthesizing information to find patterns. Yet, avoid such clustering of abilities when they are best considered on their own for development purposes.
- Rejoice in your strengths! Then, when you consider other areas for development, you'll see how they balance your strengths at the 4 and 5 levels.

Prepare for further development:

- Highlight every ability you have labeled 1, 2 or 3,
- Consider whether or not you want or need to develop each one further, checking the ones for attention and action.
- List each ability you will develop further in order of importance to you, your work situation, and your professional development. When these three criteria are met, you'll see which abilities are best to put at the top of your list. Identify the level

(number) of mastery you want for each of the top priorities.

- Choose one or two of those abilities or integrate a few with a common theme that will be catalytic for your own development and performance.
- Jot down under Barriers, below, the three most significant ones to moving your first choice to the level of mastery you want. For each barrier, indicate briefly under Actions, below, one step you will take to transcend it.

Barriers

Actions to Transcend Barriers

- Name below two or three partners for your process of development. Consider appropriate colleagues, customers, supervisors, friends, and/or subordinates whom you trust and respect — and preferably like. Ask them for specific support in developing your choice. Offer something of use to them in return or ask them how you can assist them. Consider the article on mutual mentoring and other related ones at <https://www.ruthschimmel.com/resources/>
- Identify below any additional, manageable ways you will use to improve the ability you have chosen to develop. Add your own ideas in the spaces at the end. Put them in priority order in relation to criteria such as cost, accessibility, time involved, efficacy, and appeal to you. In general, choose learning situations and opportunities that are as challenging, creative, and enjoyable as possible.
 - participating in workshops and other programs, provided by outside sources that encourage practice and follow up
 - learning and practicing regularly on your own
 - reviewing and following up on previous verbal, written and audio-visual feedback and guidance
 - studying related books, articles, websites, videos, online courses, podcasts, and guides independently and/or with a partner or small group
 - observing others' mistakes to determine what you'll avoid
 - studying role models in your organization and elsewhere to determine how to expand and deepen your repertoire

- learning from relevant leadership and management examples in the arts, such as literature, film, theater, and television, as well as sports
- preparing and delivering formal and informal training that relates to your area of development
- obtaining guidance and feedback from mentors and colleagues
- _____
- _____
- _____

Create your first development plan

- Describe briefly the priority ability or cluster of abilities you want to improve and why.
- Specify the outcome you want and need, including the level (number) of mastery.
- Indicate the:
 - concrete steps you will take along the time line you draw for completion
 - blocks of time on your calendar for learning and practice
 - criteria for evaluating your progress
 - assistance you will obtain, including people and learning processes, chosen from the bulleted options in the previous section
- Use and create opportunities for humor, enjoyment, and rewards. If your organization or group does not have such incentives, what can you do to develop them?

Your continuing process of professional development. When you reach the level of mastery you've chosen in your first development plan, select another ability or cluster of abilities to strengthen. Use the suggested planning approach above or a version that works better for you — after a reasonable breather and celebration of accomplishments, of course.

- Take small, steady steps. The more viable choices for learning can probably be integrated into everyday situations.
- Identify ways to practice regularly by scheduling opportunities on your calendar and being alert for unplanned opportunities.
- Get feedback on how you're doing from frank, insightful, kind people.
- Refine your efforts.
- Reward yourself for results.

You're likely to see more concrete results and enjoy the process more with consistent efforts and reinforcement. They usually work better than quick fixes or isolated training situations lacking applications to your situation such as pre and post work.

Although this guide implies your developmental process will be linear, neatness is neither necessary nor typical. A person, source for improvement or situation that inspires you to strengthen an important ability could enter your life. You may get a flash of insight or experience discomfort that motivates you in new ways. So, whether or not you want to create and act on a plan, stay alert for and dream up opportunities to strengthen abilities that would be worthwhile and enjoyable to nurture in yourself.

Your experiences will also better equip you to assist others in their development. As a leader and manager, the empathy that emerges from your own learning process can be a catalyst for encouraging others.

FOR ADDITIONAL INSIGHT, LEARNING AND GUIDANCE

Note: This long list is provided in no particular order on purpose to encourage you to skim it all. Choose one or two books to explore, possibly by looking at its table of contents in a public or school library, book store, or on www.amazon.com. If you find a book or another source is not as appealing as you thought it would be, let it go and move on to another one. For particular themes or topics not suggested below, more current titles, and topics that emerge from your self-assessment and conversations with people you admire and enjoy, you can explore Amazon book offerings and bookstores.

Of course, discover on your own and ask others for their recommendations about books, articles, websites, magazines, newspapers, blogs, podcasts, and other sources. Usually, the more experiential your approach to learning, the better. So, I encourage you to practice new skills and abilities as well as to elicit feedback and collaborate with people you respect.

Noise: A Flaw in Human Judgment by Daniel Kahneman, Oliver Sibony, and Cass R. Sunstein
Convergence: Technology, Business, and the Human-Centric Future by Deborah Westphal with Beth Comstock

Remote Work Revolution: Succeeding from Anywhere by Tsedal Neeley

Farsighted: How We Make the Decisions that Matter Most by Steven Johnson

Dare to Lead: Brave Work, Tough Conversations, and Whole Hearts by Brené Brown.

Leadership in Turbulent Times by Doris Kearns Goodwin

Leaders Eat Last: Why Some Teams Pull Together and Others Don't by Simon Sinek

Leadership and Self-Deception: Getting Out of the Box by The Arbinger Institute

Leaders: Myth and Reality by Stanley McChrystal and Jeff Eggers

A Manager's Guide to Self-Development by Mike Pedler
The First Time Manager by Loren B. Belker and Jim McCormick
The Leadership Odyssey: A Self-Development Guide to New Skills for New Times by Carole S. Napolitano and Lida J. Henderson
Best Practices in Organizational Development and Change: Culture, Leadership, Retention, Performance Coaching edited by Louis Carter et al
Learning to Lead: The Art of Transforming Managers into Leaders by Jay Alden Conger
The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization by Peter M. Senge
Primal Leadership: Learning to Lead with Emotional Intelligence by Daniel Goleman
The Leader of the Future 2: Visions, Strategies and Practices for the New Era by Frances Hesselbein and Marshall Goldsmith
Fit In! The Unofficial Guide to Corporate Culture by Mark Williams
Motivating The "What's In It For Me?" Workforce: Managing Across the Generational Divide by Cam Marston
Management and Leadership Development by Christopher Mabey and Tim Finch Lees
Authentic Leadership Theory and Practice, Volume 3: Origins, Effects and Development by editors William L. Gardner, Bruce J. Avolio and Fred O. Walumbwa
Creative Leadership: Skills That Drive Change by Gerard J. Puccio, Mary C. Murdock and Marie Mance
True North: Discover Your Authentic Leadership by Bill George and Peter Sims
Good to Great: Why Some Companies Make the Leap... and Others Don't by Jim Collins
Good to Great in the Social Sectors by Jim Collins
The Drucker Foundation Self-Assessment Tool: Participant Workbook, revised edition by Peter F. Drucker
A Leader's Legacy by James M. Kouzes and Barry C. Posner
Fun Works: Creating Places Where People Love to Work by Leslie Yerkes
Bridging the Generation Gap: How to Get Radio Babies, Boomers, Gen Xers, and Gen Yers to Work Together and Achieve More by Linda Gravett and Robin Throckmorton
When Generations Collide: Who They Are, Why They Clash, How to Solve the Generation Puzzle at Work by Lynne C. Lancaster
Launching a Leadership Revolution by Chris Brady and Orrin Woodward
Go Put Your Strengths to Work by Marcus Buckingham
Strengthsfinder 2.0 by Tom Rath
Crucial Conversations by Kelly Patterson et al
A Guide to Project Management Body of Knowledge by Project Management Institute
A Whole New Mind by Daniel Pink
What Got You Here Won't Get You There by Marshall Goldsmith
Get Out of Your Own Way by Robert K. Cooper
The Org: The Underlying Logic of the Office by Ray Fisman and Tim Sullivan
Choose Courage: Step Into the Life You Want and five related handbooks on Amazon by Ruth Schimel
Happiness and Joy in Work: Preparing for Your Future by Ruth Schimel

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