



EQ-i^{2.0}
assess. predict. perform.

COACH LEADERSHIP

REPORT

00DPS00
00



Response Style Explained

1RDOGFRQFQIRQGIRKSR

Participant Summary

1DPDPSO

QG)PDO

RPSORQD
 PRRPSORQ
 1RPSQDO3RSODRQ
 1RPRQDQDGD

QDOOKRSRQP

Inconsistency Index:

KQFRQQFQGQGFQDQFRQQFQSRQDFRSDRIPPDQPODFRQQ

Positive Impression:

Negative Impression:

Both the Positive and Negative Impression indices are less than 3. Responses are likely neither the result of an overly positive, nor an overly negative response style. You may want to ask:

Tell me about your process for responding to the items.

What did you think of the items? Were any particularly difficult to respond to?

Item 133 (My responses to the preceding sentences were open and honest):

Ms. Sample s response was: **Always/Almost Always.**

Omitted Items:

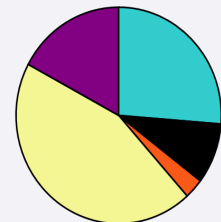
1RPRPG

Response Distribution

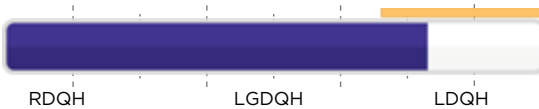
Ms. Sample did not show a significant preference for using either the extreme ends or the middle points of the response scale.

Responses

- ? = 0%
- 1. Never/Rarely = 26%
- 2. Occasionally = 9%
- 3. Sometimes = 3%
- 4. Often = 44%
- 5. Always/Almost Always = 17%



Overview Total EI

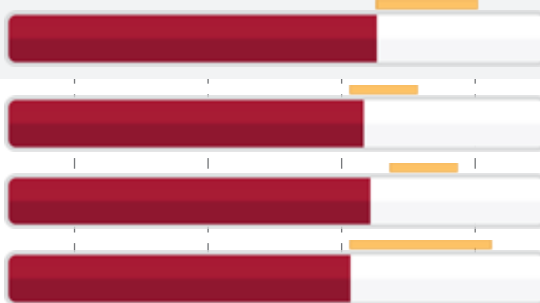


Self-Perception Composite

Self-Regard
Respecting oneself; Confidence

Self-Actualization
Pursuit of meaning; Self-improvement

Emotional Self-Awareness
Understanding own emotions

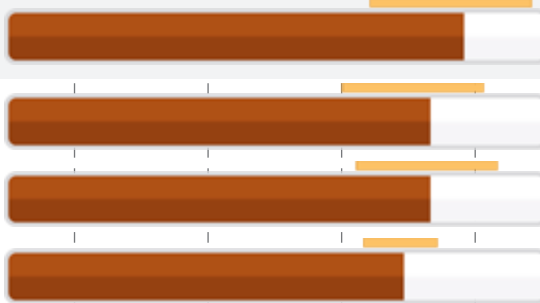


Self-Expression Composite

Emotional Expression
Constructive expression of emotions

Assertiveness
Communicating feelings, beliefs; Non-offensive

Independence
Self-directed; Free from emotional dependency

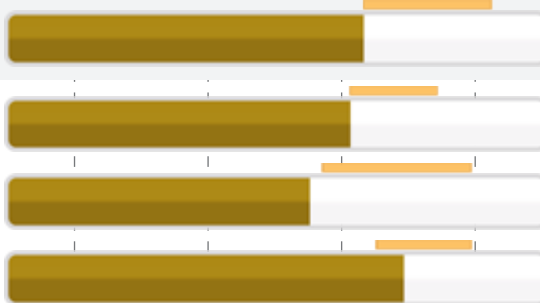


Interpersonal Composite

Interpersonal Relationships
Mutually satisfying relationships

Empathy
Understanding, appreciating how others feel

Social Responsibility
Social consciousness; Helpful



Decision Making Composite

Problem Solving
Find solutions when emotions are involved

Reality Testing
Objective; See things as they really are

Impulse Control
Resist or delay impulse to act

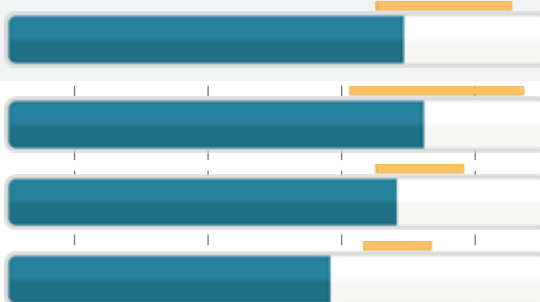


Stress Management Composite

Flexibility
Adapting emotions, thoughts and behaviors

Stress Tolerance
Coping with stressful situations

Optimism
Positive attitude and outlook on life



RDQH LGDQH LDQH

Leadership Potential

The EQ-i 2.0 subscales are strongly related to leadership competencies that in turn may be associated with productivity, decreased employee turnover, and increased efficiency. A leader who embodies the competencies below is more likely to increase work satisfaction, create trust, and foster organizational commitment and loyalty.

This page provides you with a leadership lens through which to view your EQ-i 2.0 results. There are four general competencies required of most leaders: authenticity, coaching, insight and innovation. The top six EQ-i subscales (based on theory and research) that are associated with each competency are displayed. High scores on the associated subscales help ensure optimal functioning in the competency area. Alternatively, if you score lower on a few subscales for a particular leadership competency, you can quickly see that this might be an area of challenge for you in your current leadership role. Focusing development efforts in these areas are likely to yield the greatest return in your growth as a leader.

Authenticity

An effective leader in the area of authenticity serves as a role model to inspire moral and fair behavior, as well as to command esteem and confidence from colleagues.



Self-Actualization



Reality Testing



Self-Regard



Emotional Self-Awareness



Social Responsibility



Independence



Coaching

A leader who coaches effectively operates as a mentor, responding to colleagues' concerns and queries, and supporting employee needs. Employees are nurtured to achieve their highest levels of performance.



Self-Actualization



Empathy



Reality Testing



Interpersonal Relationships



Assertiveness



Emotional Self-Awareness



Insight

A leader portrays insight by communicating a purpose, meaning, and a vision for colleagues to follow. A hopeful view of the future is communicated, and employees are compelled to reach and exceed their goals.



Self-Actualization



Optimism



Self-Regard



Social Responsibility



Interpersonal Relationships



Emotional Expression



Innovation

An innovative leader places importance on taking risks, spurring colleagues' ingenuity, imagination, and autonomous thought. Knowledge is valued, and challenges and new circumstances are viewed as learning opportunities.



Self-Actualization



Independence



Problem Solving



Assertiveness



Flexibility



Optimism



Leadership Derailers

Your client has a **low risk of derailment** as he/she received above average results across all subscales shown on the right. High scores on these subscales indicate that your client is less likely to adopt a passive or avoidant leadership style. Because of high expectations placed on leaders, it is important to strive towards exceptional performance on these subscales in order to prevent moments where your client may avoid his/her leadership responsibilities.

Impulse Control



Stress Tolerance



Problem Solving



Independence



Well-Being Indicator

Satisfied with life; content



How to Use this Page

In the EQ-i 2.0 model, Happiness is different than the other EI abilities in that it both contributes to, and is a product of, EI. As such, your client's result in Happiness can be used as a barometer of emotional health and well-being.

Although the causes and factors related to an individual's happiness extend beyond the scope of this assessment, it is important to examine your client's Happiness result in relation to the other EI subscales. For example, would strengthening lower subscales lead to improved Happiness?

Or will increased Happiness stem from working within the client's strengths and talents? In either case, the best way forward is as unique to each person as his or her own definition of Happiness.

The four subscales most often associated with Happiness are:

- Self-Regard
- Optimism
- Self-Actualization
- Interpersonal Relationships

Happiness

Your client's result in Happiness suggests that more often than not, a satisfaction is felt with life, and a general enjoyment of the company of others and work. Your client may:

- Have fun at both work and play while participating in enjoyable activities.
- Be seen by the team as likeable and pleasant to be around.
- Have to occasionally manage discontentment with certain aspects of life.

Although there are no low scores in any of the four subscales typically tied to happiness, nor in any other EI skill area, your client may benefit from ensuring development goals are linked to improving Happiness. Are there additional goals that your client can set to achieve things that are important, leading to an increased sense of well-being?

Self-Regard

Happiness is a by-product of believing in oneself and living according to your own values and standards. Your client's high level of Self-Regard helps promote positive self-feelings and confidence, and can enhance life satisfaction and happiness. You might ask:

- How do you envision success in your leadership position? Are you reaching the pinnacle of success?
- What are some strategies you have used in the past (e.g., positive self-talk) to be confident and self-assured?

Optimism

In the face of setback and disappointment, the ability to regroup and reclaim a happy state is contingent on one's level of optimism. Your client's results suggest that optimism and hopefulness prevail most of the time, but perhaps this outlook could be used more frequently so that happiness becomes even more personal, permanent, and justifiable. You might ask:

- What are some steps to demonstrate your positivity in a more active/overt manner?
- Do you monitor your perspective and analyze how it affects your achievements?

Interpersonal Relationships

Your Interpersonal Relationships result indicates that your client has well-developed relationships that help to shield from the negative effects of life's daily demands. If maintained, these relationships help to enhance and sustain pervasive feelings of happiness. You might ask:

- Do you have a confidant outside of work who helps buffer any stressful or negative events that you encounter?
- How can you effectively leverage your network to maintain happiness in your work life?

Self-Actualization

Happiness comes from a willingness to learn and grow on a journey aligned with your values. Your client's level of self-motivation and feelings of an enriched life ultimately drive life achievement and overall happiness. You might ask:

- Can you pinpoint the emotions you experience when you feel you are optimally using your talents?

Balancing EI

This section shows three related subscales for each of the fifteen subscales on the EQ-i 2.0. Below, you will find examples of feedback that you can provide to the respondent.

- Where a greater than (>) or less than (<) sign is shown, the subscale scores are significantly different and further investigation into these imbalances is recommended.
- When an equal sign (=) is shown, the subscale scores are not significantly different from one another and therefore are well balanced. In order to maintain this balance, you may want to guide

the respondent to watch for significant growth in one subscale over the other and consider ways that he/she can develop the subscales in tandem.

Please note that if you included this section in the respondent's report, the respondent will see only one subscale (the relationship with the greatest score discrepancy). All three relationships are shown here so that you may debrief the respondent on other areas that are out of balance. In addition to what is displayed in this report, you may want to explore other balances and imbalances in the respondent's profile that may lead to further EI development.

Self-Perception

Self-Regard	Self-Actualization =	RUHOIHDUGLLQEDODQFHLWRUHOIFWDOLDWLRQ
	Problem Solving <	RUHOIHDUGLORHUWDQRUUREOHPROLQHFRPSRQHQWFDQEH EDODQFHGEHDODWLQRUHOIRUWLQWHUPRIRUDELQWWRROHSUREOHPDQGE DOLGDWLQGGHFLLRQEHIRUHDFWLQHQHSUREOHPROLQHDODWHRUWUHQWQDQ HDNQHHQGGHHORSROWLRQWDFDWHUWRRUWUHQW
	Reality Testing =	RUHOIHDUGLLQEDODQFHLWRUHDOLWHWLQ
Self-Actualization	Self-Regard =	RUHOIFWDOLDWLRQLLQEDODQFHLWRUHOIHDUG
	Optimism =	RUHOIFWDOLDWLRQLLQEDODQFHLWRUSWLPLP
	Reality Testing =	RUHOIFWDOLDWLRQLLQEDODQFHLWRUHDOLWHWLQ
Emotional Self-Awareness	Reality Testing =	RUPRWLRQDOHOIDUHQHLLQEDODQFHLWRUHDOLWHWLQ
	Emotional Expression <	RUPRWLRQDOHOIDUHQHLORHUWDQRUPRWLRQDOSUHLRQUHSODLQLQ RDUHHSUHLQDQHPRWLRQRUHDPSOHSURLGHUHDRQIRURDUH RUULHGDERWDQSFRLQELQHPHHLQGRQWMEHRUULHGLDOLQPHQWLOO HOSRPDQDHRUHPRWLRQPRUHIIHFWLHODQGHOSRWHUWRGHDOLWWH QGHUOLQFDH
	Stress Tolerance =	RUPRWLRQDOHOIDUHQHLLQEDODQFHLWRUWUHQHROHUDQFH

Balancing EI

Self-Expression

Emotional Expression	Interpersonal Relationships	RUPRWLRQDOSUHLRQLLHUWDQRU,QWHUSHURQDOHODWLRQLSUHOWH HSUHLRQRIWRWDQGIHHOLQFDQEHLDQDODEOHWRPDLQWDLQLQPHDQLQIODQG UHFLSURFDOUHODWLRQLSHDWWHQWLHWRRRURUGWRQHDQGERGODQDHFDDQ LQIOHQFHFROOHDHWRPDLPLHWHHHIHFWLHGHRIRULQWHUDFWLRQLWWHP
	Assertiveness	RUPRWLRQDOSUHLRQLLQEDODQFHLWRUHUWLHGQ
	Empathy	RUPRWLRQDOSUHLRQLLHUWDQRUPSDWRRIRFPRUHRQWH HSUHLRQRIHPRWLRQWRWDQGIHHOLQWDQQRQEHLDQHPDSDLFWWRDUGRWHU DODQFLQWHHIDFWUHTLUHFDUHIOOLWHQLQWRWHLGHDRIRWHUDHOODEHLQ DWWHQWLHWRWHLUIHHOLQHQWHHIDFWDUHEDODQFHGRFDQHHIHFWLHODH HWHUWHLQWHQLWDQGWLPLQRIRUHSUHLRQLDSSURSULDWHIRUWHLWDWLRQ
Assertiveness	Interpersonal Relationships	RUHUWLHQHLLHUWDQRU,QWHUSHURQDOHODWLRQLSUHOWHHLQWDW RWHQGWRIRFPRUHRQSURPRWLQRURQLHDQGWWRPDEHQHILWIURPEHLQ HTDODWWHQWLHWRWHLHRIRWHUGRLQRRPDWULNHDEHWWHUEDODQFHRI LHDQGWDNHLQRURUNUHODWLRQLS
	Emotional Self-Awareness	RUHUWLHQHLLHUWDQRUPRWLRQDOHODIDUHGHQUHWDWRDWWHQG WRRUWRQHRIRLFHERGODQDHDQGWHPDQQHULQLFRWUHDWRWHUHQR DUHEHLQDHUWLHHOIQGHUWDQGLQLOOHOSRWRHSUHRUDHUWLHQHPRUH DSSURSULDWHO
	Empathy	RUHUWLHQHLLHUWDQRUPSDWHUHSRLEOHIRFRQFROODERUDWLRQ LQPHHWLQRROGWULHWRDSSURSULDWHODHUWRULHEWRDQHTDO LOOLQQHWROLWHQWRRWHUDQGEHLOOLQWRDUHHHQSRLEOH
Independence	Problem Solving	RU,QGSHSQGHQFHLLQEDODQFHLWRUUREOHPROLQ
	Emotional Self-Awareness	RU,QGSHSQGHQFHLLQEDODQFHLWRUPRWLRQDOHODIDUHGH
	Interpersonal Relationships	RU,QGSHSQGHQFHLLQEDODQFHLWRU,QWHUSHURQDOHODWLRQLS

■ Balancing EI

■ Interpersonal

Interpersonal Relationships	Self-Actualization	
	Problem Solving	
	Independence	
Empathy	Emotional Self-Awareness	
	Reality Testing	
	Emotional Expression	
Social Responsibility	Self-Actualization	
	Interpersonal Relationships	
	Empathy	

■ Balancing EI

■ Decision Making

Problem Solving	Flexibility	
	Reality Testing	
	Emotional Self-Awareness	
Reality Testing	Emotional Self-Awareness	
	Self-Regard	
	Problem Solving	
Impulse Control	Flexibility	
	Stress Tolerance	
	Assertiveness	

■ Balancing EI

■ Stress Management

Flexibility	Problem Solving	
	Independence	
	Impulse Control	
Stress Tolerance	Problem Solving	
	Flexibility	
	Interpersonal Relationships	
Optimism	Self-Regard	
	Interpersonal Relationships	
	Reality Testing	

Item Responses

Responses are shown by item on the following two pages. Items are shown by subscale and are exactly as they appeared on the assessment. Please note, although some items use reversed language, the higher the response indicated, the more frequent is the behavior.

Responses to each item were provided using the following rating scale:

1= Never/Rarely; 2=Occasionally; 3=Sometimes; 4=Often; 5=Always/Almost Always.

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Item Responses

Inconsistency Item Pairs  indicates inconsistent responses

Positive Impression/Negative Impression

Follow-up Questions

The following questions are suggested to probe further into your client's results. Questions are listed by subscale.

Self-Regard

1. What do you believe are your strengths as a leader? Provide an example where you used your strengths to your advantage.
2. How does your level of confidence impact the influence you have on your team?
3. How can you use your strengths to enhance your leadership skills?
4. Which of your abilities require development? Provide an example where you had to work around/compensate for an area of challenge.
5. Describe a situation where you had to overcome feelings of insecurity or low confidence in your abilities.
6. In what leadership scenarios do you feel less confident in your skills? Why do you think that is?
7. How can you overcome challenges to becoming a strong leader?
8. Tell me about a time when it was clear you had made a mistake or error. How did you feel and what action did you take to rectify the situation? Why do you think you felt this way?
9. What are you willing to do to improve your leadership skills, abilities, habits, and attitudes?

Self-Actualization

1. What are some of your interests outside of work? What new activities or interests would you like to explore?
2. How would you describe your work-life balance? Are you able to leave your work responsibilities in order to pursue outside interests?
3. Are there some areas of your life that you wish you could enhance? Either by spending more time or becoming more knowledgeable about something?
4. Can you describe one or two of your short-term goals? Long-term goals? How are your short-term goals connected to your long term-goals?
5. Tell me about your process for setting goals. How would you describe the goals you set for yourself? How would you describe the goals you set for your team?
6. What are some words you would use to describe your leadership style?
7. Who are some of the leaders you view as role models? Which of their characteristics do you aspire to have?
8. How are you working towards obtaining the leadership skills and characteristics you aspire to have? What are some steps you could put in place?
9. Does your team know what activities and interests fulfill you? Do you know what interests each person on your team has?

Emotional Self-Awareness

1. How do your emotions affect your team? Can you provide an example where your team was affected by the way you were feeling?
2. What things do you feel really happy about? Sad? Angry? Describe how you experience these emotions physically, behaviorally, and cognitively.
3. Describe a time when you were making a decision and your emotions got the best of you. What emotions were you experiencing and what was your reaction?
4. What signals can you look for within your team to warn you of your heightened emotions?
5. What emotions make you a more effective leader? What emotions help you influence and inspire your team? How can you identify these emotions?

Emotional Expression

1. Do you ever feel emotionally exhausted as a leader? How can you leverage your Emotional Expression skills to re-fuel?
2. Are there some emotions you feel more comfortable expressing than others? Why do you think that is? How do you express what you are feeling? Give examples.
3. Describe a time when you regretted not having expressed your true thoughts or feelings about something. What were the consequences (positive and negative) of not expressing your feelings? How would the situation have been different had you been more expressive?
4. In general, do you find yourself bottling up emotions? How does this affect your ability to get your work done?
5. Does your team know your thoughts or feelings and where you stand on pertinent issues? Has your team ever misread the way you expressed yourself? Why do you think that happened?
6. Does your team come to you with input or feedback? What can be done to ensure your "open door" policy is truly seen as an open-door policy by your team?

Assertiveness

1. Describe a scenario in which you behaved as an assertive leader. What specifically did you do or say that was assertive?
2. What do you find challenging about being assertive?
3. In what ways do you hold others accountable for their actions/behaviors? Do you ever struggle to follow through on accountability?
4. If you were more assertive, how would that help your team be more innovative and tolerant of taking risks?
5. How do you manage performance issues? How can you be more assertive when discussing performance plans?
6. What is the difference between assertive and aggressive behavior? Have you ever been perceived as being aggressive? How do you know?
7. When you disagree with your team, how do you present your differing point of view?
8. When there are several viewpoints and disagreements within your team, how do you address these differing perspectives to reach a decision?

Follow-up Questions

Independence

1. What role does independence play in being seen as a moral and fair leader?
2. Are there times when you need the counsel of others more than you'd like? What is at the root cause of your reliance on them?
3. Describe your typical style for making decisions.
4. Can you give an example of when you relied on your team to make a decision for you? What was the outcome?
5. What feelings do you experience when you need to work independently from others? Do these feelings change (i.e., become more or less intense) over time?
6. How do you balance involving your team in the decision-making process and making the final decision as a leader?
7. Describe a time when you had to make a final decision as the leader, either when your team felt differently from you, or when there was disagreement within the team. How did you proceed? What was the outcome?

Interpersonal Relationships

1. Describe a time when you mediated a conflict among your team members. Describe a time when you were in disagreement with a team member. How did your emotions differ between experiences?
2. Describe what types of social situations make you feel uncomfortable. What is your typical response in these situations?
3. What are some ways you use your Interpersonal Relationship skills when coaching your team? How do you connect on a personal level?
4. Tell me about a time when you had to put extra effort into maintaining relationships with your team. What value did this relationship have in your team and leadership?
5. How do you balance Interpersonal Skills with decision-making; particularly when there is disagreement?
6. What are some strategies that you could use to build stronger relationships among your team members?

Empathy

1. How does empathy help you coach and mentor those you lead? What are some questions you could ask of your direct reports to show more empathy in your conversations?
2. Tell me about a time when it was really important that you were able to understand the way someone else felt. How did you convey this understanding? How did you ensure you understood them?
3. Describe a situation where you were not as sensitive to someone's feelings as you should have been. Why do you think this was the case? What could you have done differently?
4. In your opinion, what is the difference between sympathy and empathy? How do you ensure you display these differently?
5. How do you ensure that you understand your team's thoughts and perspectives?
6. Has your empathy ever prevented you from having a difficult conversation or making a tough decision? What would you do differently to balance empathy with assertiveness?

Social Responsibility

1. Can your team depend on you? How do you know this is the case?
2. What have you done recently to help those in need?
3. What is the difference between a leader who takes responsibility and one who doesn't? How does this affect their ability to get things done?
4. Describe a situation where you placed your team's needs/interests over your own. How often does this type of scenario occur as a leader?
5. How do you define "being a team player"? What are some examples of where your success can be attributed to your team and not to you alone?
6. What are some organizational issues that are of particular concern to you? How do you help influence these issues?
7. When things don't go as planned, how do you take responsibility for your team? How do you keep your team motivated?
8. What are some techniques you use to compel your team towards reaching their fullest potential?

Problem Solving

1. If I was to ask your team, what would they say about your typical approach to solving problems?
2. What is the impact of your problem solving skills on your ability to lead effectively?
3. What was one of the most challenging problems you have ever had to solve? Describe the problem-solving process you used to arrive at the solution.
4. How do you think your problem-solving process looks to your team? What would they say are the strengths of this process? What would they say you could do better?
5. Describe a time when your emotions hampered your ability to make a decision. Why did you get sidetracked?
6. What role do your emotions play in your problem-solving process? How do they help or hinder your ability to arrive at a solution?
7. Tell me about a time when you made a rash decision. What caused this to happen and how did it affect others?
8. How do you share the workload of problem-solving with your team?
9. What are some techniques you use to keep your emotions in check when solving problems?
10. How do you manage your emotions as well your team's emotions through the problem-solving process? What are some techniques you use?

Follow-up Questions

Reality Testing

1. How important is reality testing when coaching your employees? What are some steps you can take to ensure you are assessing performance objectively?
2. Would you describe yourself as a realist or an idealist? How does this description manifest itself in your role as a leader?
3. Describe a time where you incorrectly sized up a situation. What information did you misjudge and what was the impact?
4. How would your team describe the goals you set? What information do you take into account when you set these goals?
5. Tell me about a time when you should have been more objective rather than relying on a “gut feeling.” How do you confirm that your “gut feeling” is accurate?
6. Tell me about a time when you should have listened to your instincts rather than being so objective. How do you confirm that your instincts are reliable?
7. How do you keep in touch with your team’s reality? How do you keep in touch with the reality of other stakeholders? How do you connect these realities to lead your team towards success?
8. Tell me about a time when you had to make a decision before you had all the data to size up the situation.

Impulse Control

1. How do you typically deal with an impulse to act? Can you wait for rewards until when the timing is right?
2. Tell me about a time when you had to exercise patience and control over your behavior.
3. Do you often have to act quickly as a leader or can you be more pensive? How does that make you feel?
4. Describe a situation where you were impatient and reacted hastily. How did this impact the end result?
5. Describe a situation where it was beneficial for you to act quickly. How did this impact the end result?
6. Has your impulsiveness ever created problems for you? How do you think your team views your behavior in these instances?
7. How do you respond in times when quick decisions need be made?
8. How do you differentiate between impulsive behavior and beneficial risk-taking behavior? What techniques do you use to identify between the two types of behavior before acting on them?

Flexibility

1. Is it difficult for you to consider new information, or adjust your course of action towards achieving long term goals?
2. Would your team say that you are flexible and open to change, or rigid and set in your ways? What benefits and drawbacks does your typical style have on your ability to get things done?
3. How do you successfully manage change in an environment where people are hesitant to depart from their old ways of doing things?
4. Give an example of where you found it difficult to adjust to a change in your job. What emotions were you feeling?
5. Describe a time where you had to adjust quickly to changes in your environment. What was your process for changing your behavior/tasks?
6. How do you balance the need to have structure and process for your team with the need to be creative and open to innovative ideas?
7. What are some ways that you use your flexibility to promote innovation and resilience within your team?

Stress Tolerance

1. How do you tackle stressful circumstances as a leader? How would your team describe you under stress?
2. How does stress manifest itself in the way you feel (i.e., emotionally, physically) or act? Can you detect the very onset of stress in your body?
3. What strategies do you use to cope with stress? How much do these strategies rely on support from others?
4. Describe a time when it was important for you to remain calm under pressure. What skills or techniques did you use? How was your team impacted in this situation?
5. What skills, techniques, and/or activities do you use to manage your day-to-day stress?
6. How do you think your team has been affected by your ability to tolerate stress? What steps do you need to take to be seen as a more resilient leader?
7. What techniques do you use to gauge and manage the stress experienced by your team? What are some ways you could help alleviate some of their stress?

Optimism

1. What are some examples of how you have seized opportunities in your organization as a leader?
2. Would you describe yourself as having positive or negative expectations about how things will turn out? How does this impact the way you set goals and objectives for others?
3. Describe a project/task where you or your team experienced several setbacks. What was your approach to overcoming these difficulties?
4. When planning and setting goals, how do you manage risk? What does your contingency plan look like?
5. Describe a situation where you were overly positive or overly negative in your expectations about how things would turn out. What impact did your outlook have on your performance and that of others?
6. What are some resources or strategies you draw upon in order to stay positive about the future?
7. How do you keep your team motivated in the face of obstacles?
8. How do you think your team sees your view of the future? What steps can you take to paint a motivational vision for the long term goals your team is working on?
9. How do you balance Optimism with Reality testing when inspiring your team towards achieving goals?

Action Plan

The steps your client takes towards achieving his/her EI goals will determine whether or not success is realized. Use this step-by-step activity plan to help guide your client closer to his/her goals. Remember to use the **SMART** goal setting criteria for each goal.

SPECIFIC
MEASURABLE
ACTION-ORIENTED
REALISTIC
TIMELY

Write down up to three EI skills or behaviors that your client would like to further develop (e.g., “reflective listening” to build empathy, or “recognizing how my body reacts to stress” to raise emotional self-awareness). The **SMART** goals that your client outlines in the template should help to strengthen these EI skills and behaviors.

- 1.
- 2.
- 3.

Write down up to three overall qualities that your client would like to have (e.g., integrity, providing clear leadership, team player, clear communicator). In some way the goals you outline in this action plan should help your client achieve the overall qualities he/she identified.

- 1.
- 2.
- 3.

Transfer your client’s **SMART** goals into the action plan template below.

SMART Goal	Time Frame	Benefits	Measure of Success	Support and Resources Needed	Potential Barriers
Practice active listening	Today, especially in one on one meetings with my direct reports	Improved interpersonal relationships, empathy with my team. Increased employee engagement.	- Feedback - 360 results increase	Direct feedback from my team	Obtaining honest feedback can be difficult. Time – don’t cancel one on one meetings – demonstrate the importance of regular touch points

I commit to this action plan _____
(signature)

■ EI Development Commitment

A Development Commitment is a tool to help hold your client accountable for accomplishing the goals outlined in his/her action plan. As we all too often know, our plans for personal growth and development often fall by the wayside when we get back to work and our organization's demands win the competition for time and attention.

By outlining your client's objectives here, and ensuring that your client does the same in his or her report, you help your client to be more accountable to reaching their professional objectives.

■ My Client's Development Goals

My client's action plan includes the following goals:

Due Date

1.

2.

3.

4.

Your Signature _____

Your Client's Signature _____

Coach's Guide to an EQ-i 2.0 Debrief Session

Preparing for the Debrief

Review the Report

- Review the Response Style Explained page and look into any flagged areas.
- Review the Total EI score, Leadership Potential page and composite scores. Where does the client fall in relation to the norm group? Is the client's score in the low, mid or high range?
- Review the individual subscales and patterns. Which particular combinations of subscales are striking to you? Which do you want to investigate at the item level? Which subscales would have the greatest impact on your client's leadership?
- Review item scores for any particularly high or low scores.
- Examine the Balancing EI page. What stands out in this client's results? Which subscales do you need to look at more closely? What might be some challenges associated with the results?
- Make notes on areas you are curious about.
- What is your overall impression? What will you want to keep in mind as you go through the debrief?

Conducting the Debrief

Phase	Points to Keep in Mind	Questions to Ask
<p>1. Build Rapport</p> <p>The first step is to create a sense of ease and establish common goals between you and your client.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Explain how the feedback will be structured and how long it will take. <input type="checkbox"/> Ask what the client wants to get out of the session. <input type="checkbox"/> Remind the client of the confidentiality agreement and who "owns the data". <input type="checkbox"/> If appropriate, show the client a sample report so that they are prepared for what they will be seeing in their own report. This may help them understand what the results will indicate before they actually see them. <input type="checkbox"/> Remind the client that this is a self-report and that it is a "snapshot in time". It is a starting point for discussion, not the end of the investigation. 	<ul style="list-style-type: none"> <input type="checkbox"/> How are you feeling about this meeting? <input type="checkbox"/> What was your experience in taking the assessment? <input type="checkbox"/> Probing questions: were you alone, did you do it at the beginning of the day, end of the day; do you recall any items that you had difficulty with or that were not clear to you? <input type="checkbox"/> Is there anything significant going on in your life that may have affected how you responded to the items? <input type="checkbox"/> How did you find the items themselves? Anything you found odd or curious? <input type="checkbox"/> Do you have any questions or comments before we go over your profile?
<p>2. Validate Facts</p> <p>Next, establish the "truth" of EQ-i results in the eyes of your client.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Give definition of EI and recap details of the EQ-i 2.0. <input type="checkbox"/> As you can see, the bars represent how you responded to the items on each scale of the EQ-i 2.0. <input type="checkbox"/> The bars that are in the middle range show that compared to the norm group, you answered the items in a similar way. <input type="checkbox"/> Bars to the left indicate decreased use of behaviors related to the scale. <input type="checkbox"/> Bars to the right indicate increased use of behaviors related to the scale. 	<ul style="list-style-type: none"> <input type="checkbox"/> What is your first impression of this profile? <input type="checkbox"/> Does this profile look accurate to you? <input type="checkbox"/> What surprises you? <input type="checkbox"/> Where would you like to focus first? <input type="checkbox"/> What questions do you have about your results? <input type="checkbox"/> Can you give me an example of how you use that skill? <input type="checkbox"/> Would you say this is a real strength of yours? <input type="checkbox"/> This suggests to me that _____. Is that true of you?

Coach's Guide to an EQ-i 2.0 Debrief Session

Phase	Points to Keep in Mind	Questions to Ask
<p>3. Discovery</p> <p>In the third step, the goal is to acquire a full understanding of any challenges that may be present. As a coach, you want to probe for details to clarify your client's thoughts, feelings, opinions, and expectations.</p>	<p>Use the Follow-Up Questions pages to get a better understanding of how your client demonstrates the skills related to specific subscales.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> What areas stand out for you as things you'd like to focus on? <input type="checkbox"/> How satisfied are you with that? <input type="checkbox"/> What concerns do you have with that situation? <input type="checkbox"/> Why do you think that is so? <input type="checkbox"/> What is the message here? <input type="checkbox"/> What gets in your way in this area? <input type="checkbox"/> Why is that so frustrating? <input type="checkbox"/> How do you see that contributing to your success? <input type="checkbox"/> How do you see that holding you back? <input type="checkbox"/> Do these areas interfere with achieving your goals in any way? <input type="checkbox"/> How might a decreased use of these types of behaviors help you in your role?
<p>4. Establish Relevance</p> <p>Next, activate interest in finding a solution and gauge the possibility and desire for change.</p>	<p>Connect the importance of your conversation to your client's work, and role as a leader.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> It sounds like it is important for you to ___ as a leader. Is that correct? <input type="checkbox"/> How long have you been doing that? <input type="checkbox"/> To what extent is that effective for you? <input type="checkbox"/> How is that behavior working for you? <input type="checkbox"/> What impact does that have on the people you lead?
<p>5. Explore Benefits</p> <p>The goal here is to help your client become aware of the benefits of change by considering the benefits of a particular solution.</p>	<p>Pose hypothetical, job-related situations to help your client imagine a new state of behavior and its outcomes.</p> <p>"If... then" questions help the client project an ideal state of operating effectively.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> What is the ideal situation here? <input type="checkbox"/> If you had a choice, what would you do? <input type="checkbox"/> If you didn't have to deal with ____, how would things be different? <input type="checkbox"/> What kind of support would be helpful? <input type="checkbox"/> If you were going to work on one or two areas, which one(s) would you choose? <input type="checkbox"/> What benefits would you like to achieve by improving in those areas?
<p>6. Transition</p> <p>The last part of the session involves discussing next steps and establishing the client's commitment to continue working with you.</p>	<p>Ask transition questions to remind your client of time limitations to ensure the majority of areas you both want to discuss are addressed.</p> <p>"How" questions help work out the logistics of your future relationship.</p> <p>If appropriate, complete the Development Action Plan together with your client.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> It sounds like this is an area you'd like to work on. What are some ways that you might be able to further develop in this area? <input type="checkbox"/> What is one thing you can do to further develop this skill? <p>Questions to help close the conversation:</p> <ul style="list-style-type: none"> <input type="checkbox"/> How would you like to move forward? <input type="checkbox"/> How committed are you to your development plan? <input type="checkbox"/> If you're not completely committed, what do you need to do to get there? OR What do you need to change in your development plan in order to be fully committed? <input type="checkbox"/> How will you remain accountable for developing in this area? <input type="checkbox"/> I propose that we _____. Does that sound good to you? <input type="checkbox"/> What outstanding questions do you have?