

# PR

U.S. PATENT NO. 7,121,830

## PROGRESS<sup>®</sup> REPORT



PREPARED FOR

**PAT SAMPLE**  
November 2023

DELIVERED TO



POWERED BY



**KAISER**  
leadership solutions



# PAT SAMPLE

VP OF NORTH AMERICA  
SAMPLE COMPANY

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## TIME IN CURRENT JOB

**1 YEARS, 3 MONTHS**

## MANAGERIAL EXPERIENCE

**14 YEARS, 0 MONTHS**

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## FEEDBACK FROM 15 TOTAL OBSERVERS

- M** Manager (1)
- O** Other Senior Leaders (2)
- P** Peers (4)
- D** Direct Reports (8)

They were instructed to consider the degree of behavior change observed **since February 2023**.

## INTENDED USE

The Progress Report<sup>®</sup> is intended to provide feedback concerning development and behavior change. It was not created to provide information for making decisions about hiring, promotion, compensation, or termination and should not be used as the sole source of information for such decisions.

**THIS REPORT IS CONFIDENTIAL AND SHOULD NOT BE DISTRIBUTED WITHOUT PERMISSION.**



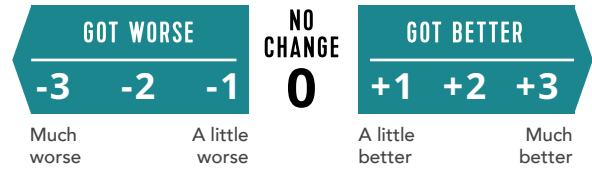
# OVERVIEW

## PURPOSE

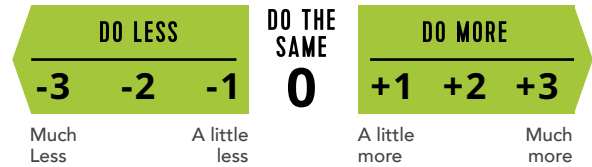
This report provides feedback concerning behavior change and “feedforward” for your on-going development. Ratings were made on both the “degree of change” scale and the “how to improve” scale, which are shown to the right.

For the “degree of change,” raters were instructed to consider change in behavior observed **since February 2023**.

### Degree of Change



### How to Improve



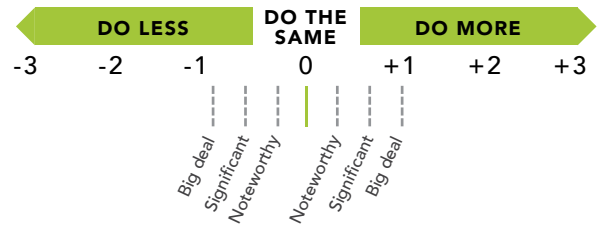
## SCORES

Average scores are presented for each rater group. Overall “360 scores” are presented as the average of scores across the coworker rater groups (and do not include self-ratings).

Raters were also given the option to indicate “not applicable/can’t rate”, and therefore there may be a different number of raters from item to item.

## INTERPRETATION GUIDELINES

Guidelines are provided to gauge the significance of various levels of scores based on a norm sample of over 2,500 assessments. The guidelines are presented in the following way:

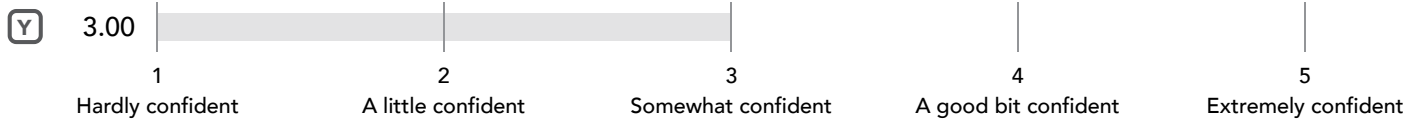


## WRITTEN FEEDBACK

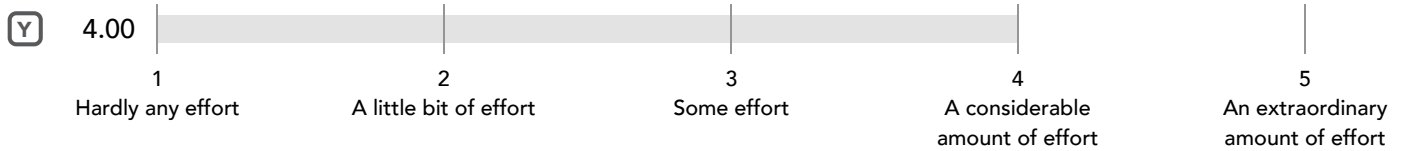
At the end of the report, you will find qualitative, written feedback to supplement the quantitative ratings. The written comments often elaborate and further clarify what the ratings mean. They may also raise some things not covered by the rating items.

# CONTEXT

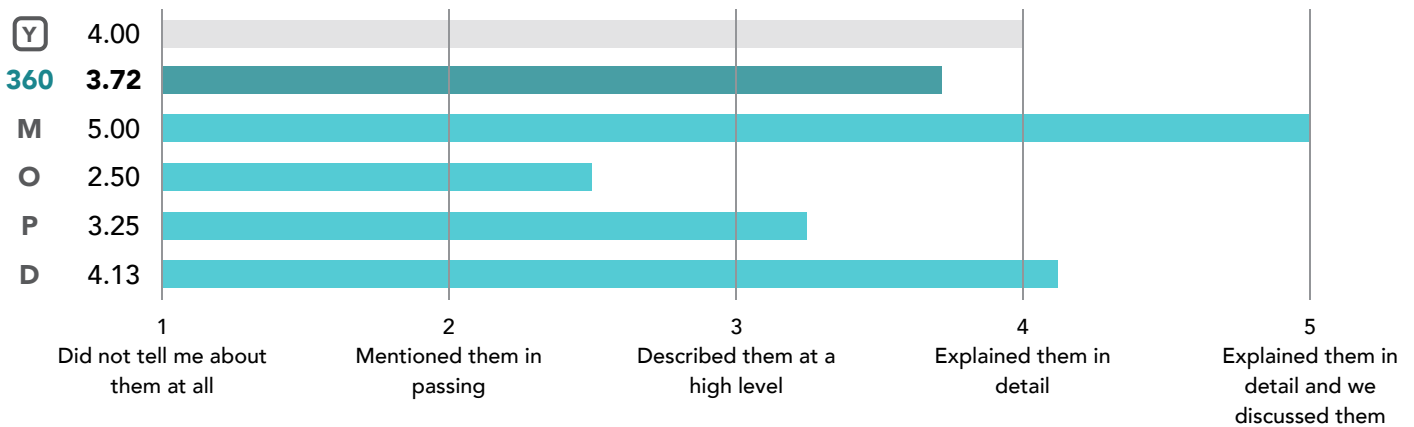
How confident were you when you set your goals for development that you could achieve them (in terms of improving the behaviors in your Progress Report survey)?



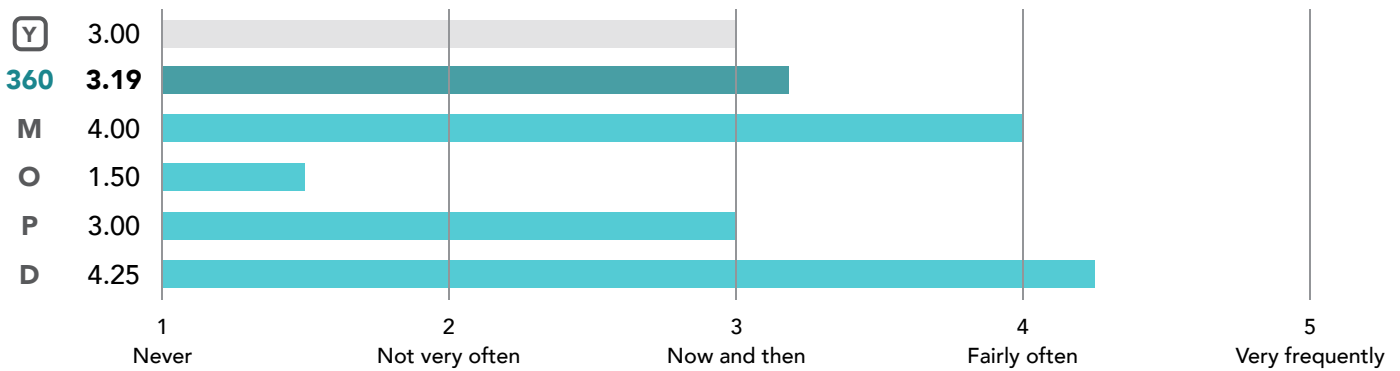
How much effort did you put into achieving your goals for development?



To what extent did Pat Sample share their goals and plans for development with you?

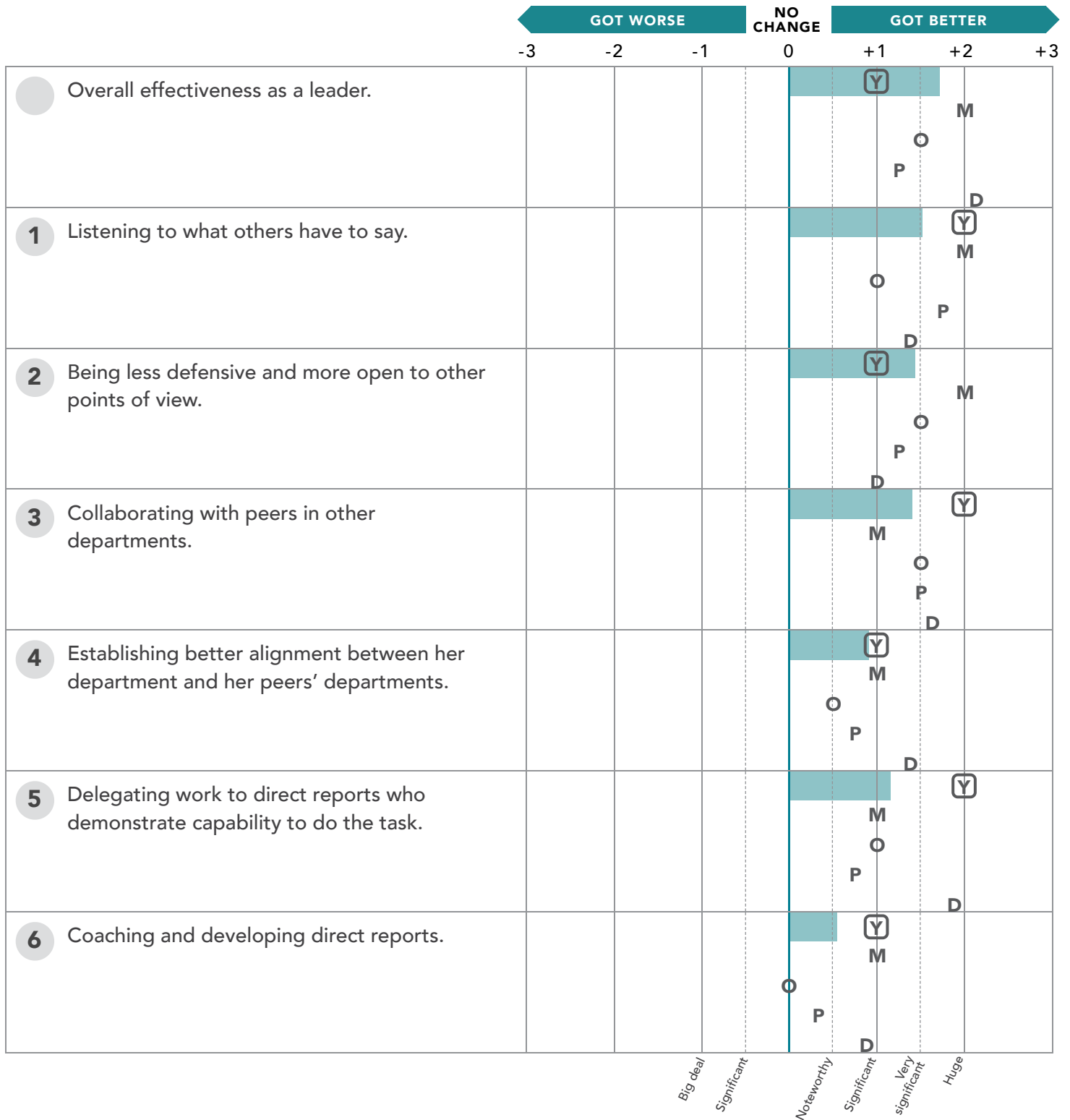


How often have you and Pat Sample discussed progress on their goals and plans for development since February 2023?



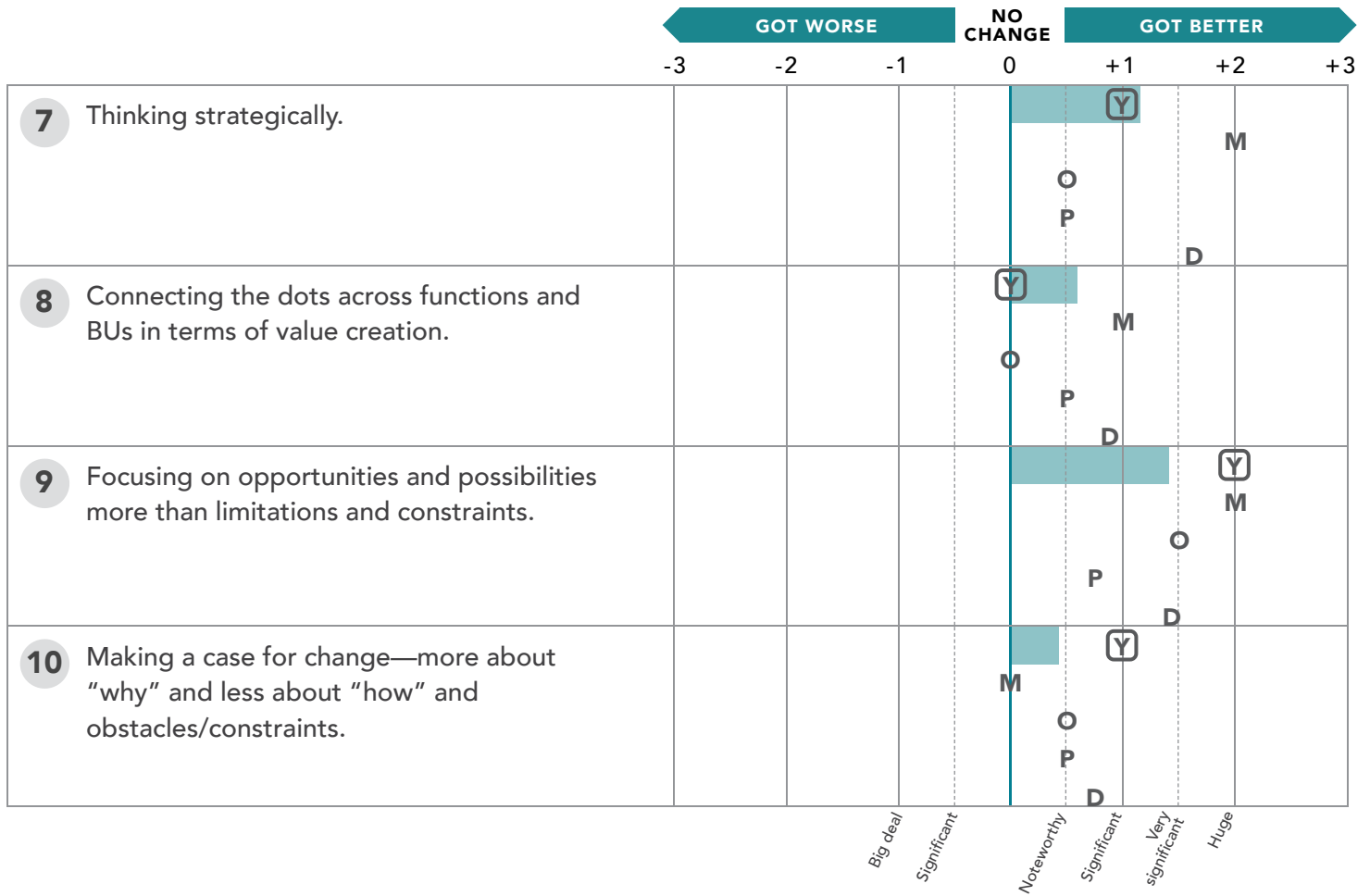
Y You   
 360 Avg of M, O, P & D   
 M Manager (1)   
 O Other Senior Leaders (2)   
 P Peers (4)   
 D Direct Reports (8)

# DEGREE OF CHANGE SINCE FEBRUARY 2023



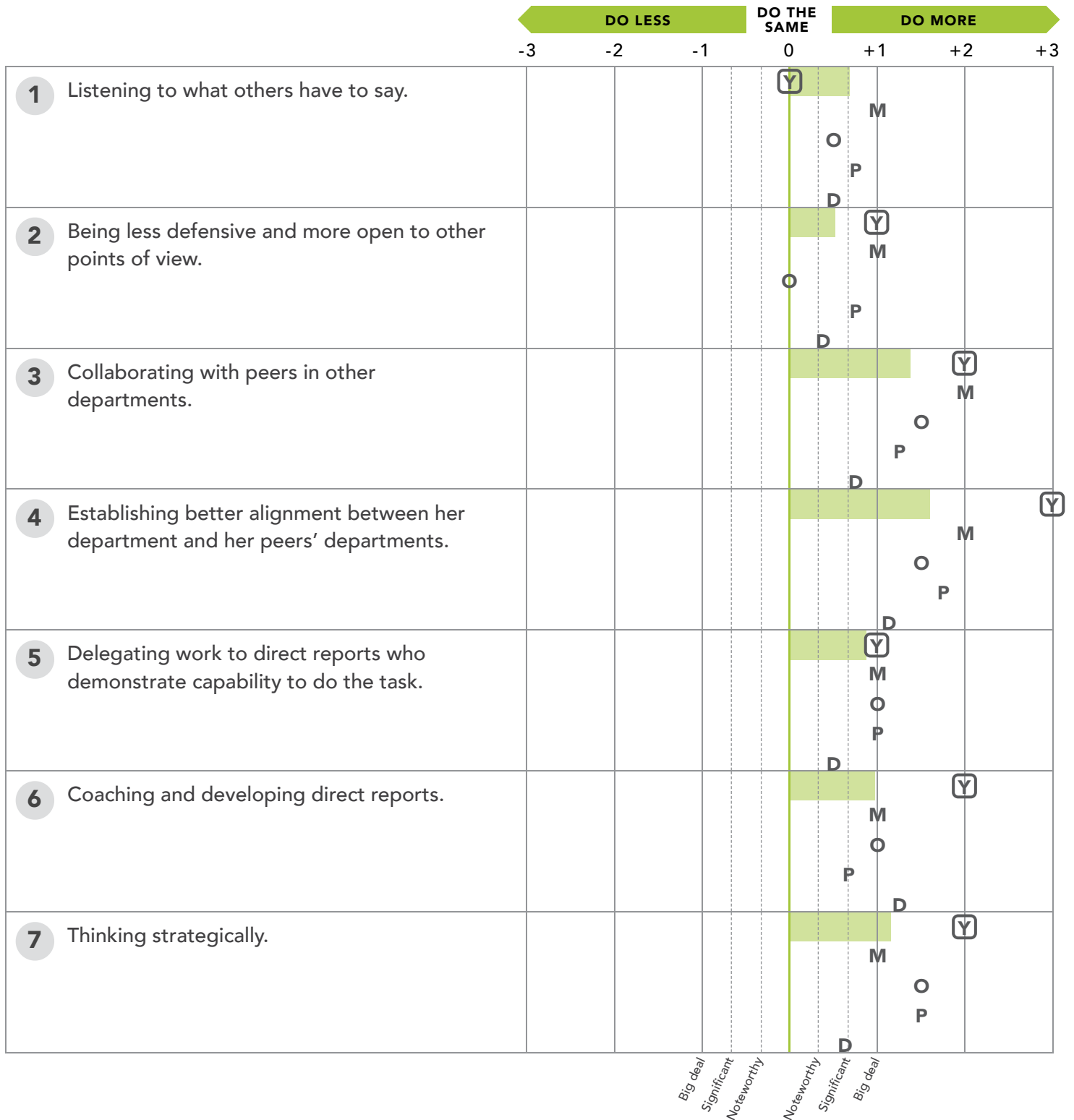
Y You    
  360 Avg of M, O, P & D    
 **M** Manager (1)    
 **O** Other Senior Leaders (2)    
 **P** Peers (4)    
 **D** Direct Reports (8)

# DEGREE OF CHANGE SINCE FEBRUARY 2023



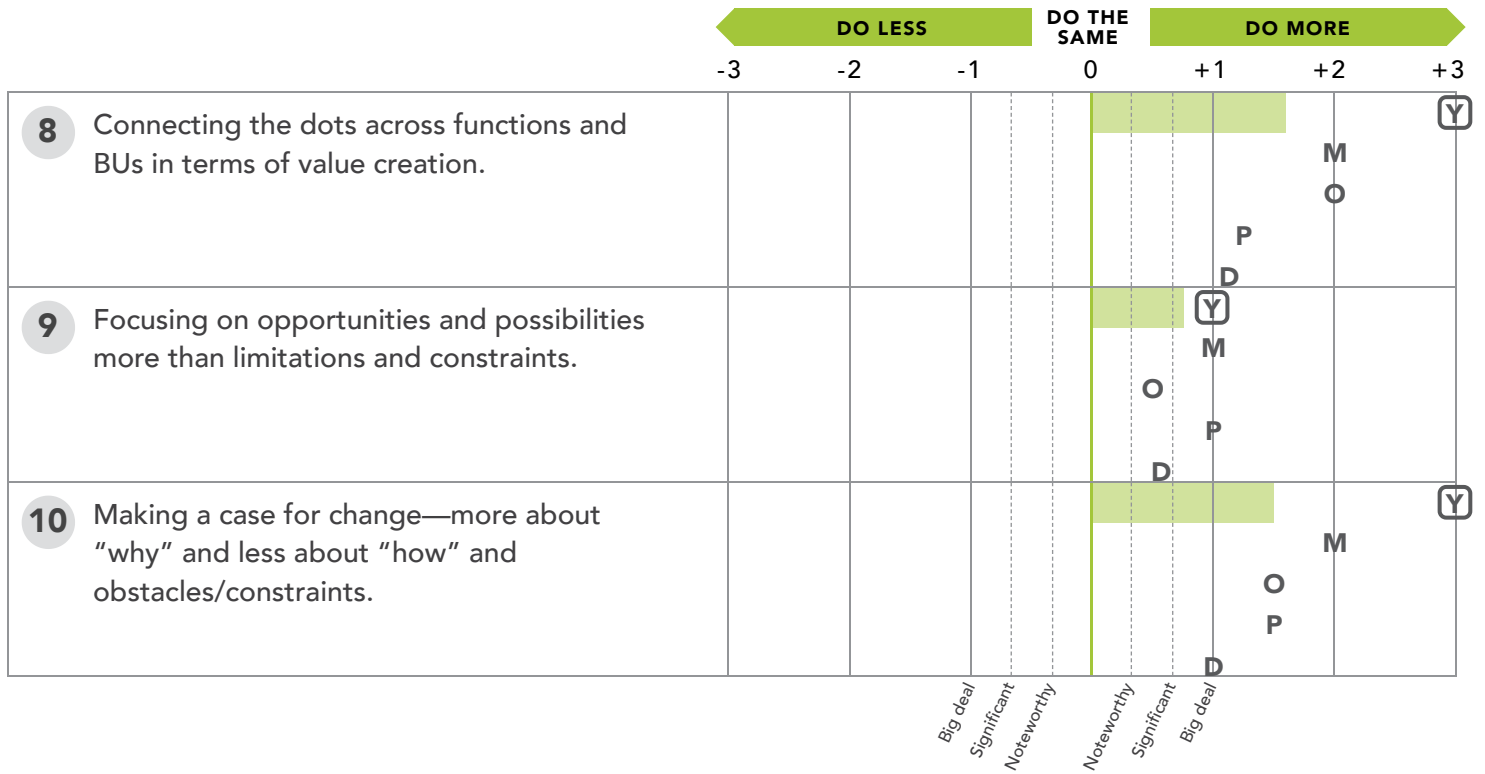
Y You    
  360 Avg of M, O, P & D    
 **M** Manager (1)    
 **O** Other Senior Leaders (2)    
 **P** Peers (4)    
 **D** Direct Reports (8)

# HOW TO IMPROVE



Y You    
  360 Avg of M, O, P & D    
 **M** Manager (1)    
 **O** Other Senior Leaders (2)    
 **P** Peers (4)    
 **D** Direct Reports (8)

# HOW TO IMPROVE



Y You    
  360 Avg of M, O, P & D    
 **M** Manager (1)    
 **O** Other Senior Leaders (2)    
 **P** Peers (4)    
 **D** Direct Reports (8)



# DETAILED ITEM RESULTS

Overall effectiveness as a leader.

Avg	GOT WORSE			NO CHANGE	GOT BETTER		
	-3	-2	-1	0	+1	+2	+3
<b>Y</b> +1.00					1		
<b>360</b> +1.72				1	3	9	2
<b>M</b> +2.00						1	
<b>O</b> +1.50					1	1	
<b>P</b> +1.25				1	1	2	
<b>D</b> +2.13					1	5	2

1 Listening to what others have to say.

Avg	GOT WORSE			NO CHANGE	GOT BETTER		
	-3	-2	-1	0	+1	+2	+3
<b>Y</b> +2.00						1	
<b>360</b> +1.53				1	6	8	
<b>M</b> +2.00						1	
<b>O</b> +1.00					2		
<b>P</b> +1.75					1	3	
<b>D</b> +1.38				1	3	4	

Avg	DO LESS			DO THE SAME	DO MORE		
	-3	-2	-1	0	+1	+2	+3
<b>Y</b> 0.00				1			
<b>360</b> +0.69				6	9		
<b>M</b> +1.00					1		
<b>O</b> +0.50				1	1		
<b>P</b> +0.75				1	3		
<b>D</b> +0.50				4	4		

2 Being less defensive and more open to other points of view.

Avg	GOT WORSE			NO CHANGE	GOT BETTER		
	-3	-2	-1	0	+1	+2	+3
<b>Y</b> +1.00					1		
<b>360</b> +1.44			1		9	5	
<b>M</b> +2.00						1	
<b>O</b> +1.50					1	1	
<b>P</b> +1.25					3	1	
<b>D</b> +1.00			1		5	2	

Avg	DO LESS			DO THE SAME	DO MORE		
	-3	-2	-1	0	+1	+2	+3
<b>Y</b> +1.00					1		
<b>360</b> +0.53				10	3	2	
<b>M</b> +1.00					1		
<b>O</b> 0.00				2			
<b>P</b> +0.75				2	1	1	
<b>D</b> +0.38				6	1	1	

**Y** You    **360** Avg of M, O, P & D    **M** Manager (1)    **O** Other Senior Leaders (2)  
**P** Peers (4)    **D** Direct Reports (8)

# DETAILED ITEM RESULTS

## 3 Collaborating with peers in other departments.

	Avg	GOT WORSE			NO CHANGE	GOT BETTER		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+2.00						1	
<b>360</b>	+1.41					7	8	
<b>M</b>	+1.00					1		
<b>O</b>	+1.50					1	1	
<b>P</b>	+1.50					2	2	
<b>D</b>	+1.63					3	5	

	Avg	DO LESS			DO THE SAME	DO MORE		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+2.00						1	
<b>360</b>	+1.38				3	8	4	
<b>M</b>	+2.00						1	
<b>O</b>	+1.50					1	1	
<b>P</b>	+1.25					3	1	
<b>D</b>	+0.75				3	4	1	

## 4 Establishing better alignment between her department and her peers' departments.

	Avg	GOT WORSE			NO CHANGE	GOT BETTER		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+1.00					1		
<b>360</b>	+0.91				3	8	4	
<b>M</b>	+1.00					1		
<b>O</b>	+0.50				1	1		
<b>P</b>	+0.75				1	3		
<b>D</b>	+1.38				1	3	4	

	Avg	DO LESS			DO THE SAME	DO MORE		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+3.00							1
<b>360</b>	+1.60				2	7	4	2
<b>M</b>	+2.00						1	
<b>O</b>	+1.50					1	1	
<b>P</b>	+1.75					2	1	1
<b>D</b>	+1.13				2	4	1	1

## 5 Delegating work to direct reports who demonstrate capability to do the task.

	Avg	GOT WORSE			NO CHANGE	GOT BETTER		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+2.00						1	
<b>360</b>	+1.16				1	7	5	1
<b>M</b>	+1.00					1		
<b>O</b>	+1.00					1		
<b>P</b>	+0.75				1	3		
<b>D</b>	+1.88					2	5	1

	Avg	DO LESS			DO THE SAME	DO MORE		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+1.00						1	
<b>360</b>	+0.88				6	6	2	
<b>M</b>	+1.00						1	
<b>O</b>	+1.00						1	
<b>P</b>	+1.00				1	2	1	
<b>D</b>	+0.50				5	2	1	

**Y** You    **360** Avg of M, O, P & D    **M** Manager (1)    **O** Other Senior Leaders (2)  
**P** Peers (4)    **D** Direct Reports (8)

# DETAILED ITEM RESULTS

## 6 Coaching and developing direct reports.

	Avg	GOT WORSE			NO CHANGE	GOT BETTER		
		-3	-2	-1		0	+1	+2
<b>Y</b>	+1.00					1		
<b>360</b>	+0.55			1	4	6	2	
<b>M</b>	+1.00					1		
<b>O</b>	0.00				1			
<b>P</b>	+0.33				2	1		
<b>D</b>	+0.88			1	1	4	2	

	Avg	DO LESS			DO THE SAME	DO MORE		
		-3	-2	-1		0	+1	+2
<b>Y</b>	+2.00						1	
<b>360</b>	+0.98				3	7	2	1
<b>M</b>	+1.00					1		
<b>O</b>	+1.00					1		
<b>P</b>	+0.67				1	2		
<b>D</b>	+1.25				2	3	2	1

## 7 Thinking strategically.

	Avg	GOT WORSE			NO CHANGE	GOT BETTER		
		-3	-2	-1		0	+1	+2
<b>Y</b>	+1.00					1		
<b>360</b>	+1.16				4	5	5	1
<b>M</b>	+2.00						1	
<b>O</b>	+0.50				1	1		
<b>P</b>	+0.50				2	2		
<b>D</b>	+1.63				1	2	4	1

	Avg	DO LESS			DO THE SAME	DO MORE		
		-3	-2	-1		0	+1	+2
<b>Y</b>	+2.00						1	
<b>360</b>	+1.16				5	5	5	
<b>M</b>	+1.00					1		
<b>O</b>	+1.50					1	1	
<b>P</b>	+1.50					2	2	
<b>D</b>	+0.63				5	1	2	

## 8 Connecting the dots across functions and BUs in terms of value creation.

	Avg	GOT WORSE			NO CHANGE	GOT BETTER		
		-3	-2	-1		0	+1	+2
<b>Y</b>	0.00				1			
<b>360</b>	+0.60				5	8	1	
<b>M</b>	+1.00					1		
<b>O</b>	0.00				1			
<b>P</b>	+0.50				2	2		
<b>D</b>	+0.88				2	5	1	

	Avg	DO LESS			DO THE SAME	DO MORE		
		-3	-2	-1		0	+1	+2
<b>Y</b>	+3.00							1
<b>360</b>	+1.60				2	6	6	
<b>M</b>	+2.00						1	
<b>O</b>	+2.00						1	
<b>P</b>	+1.25					3	1	
<b>D</b>	+1.13				2	3	3	

**Y** You   **360** Avg of M, O, P & D   **M** Manager (1)   **O** Other Senior Leaders (2)  
**P** Peers (4)   **D** Direct Reports (8)

# DETAILED ITEM RESULTS

9 Focusing on opportunities and possibilities more than limitations and constraints.

	Avg	GOT WORSE			NO CHANGE	GOT BETTER		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+2.00						1	
<b>360</b>	+1.42				1	8	5	
<b>M</b>	+2.00						1	
<b>O</b>	+1.50					1	1	
<b>P</b>	+0.75				1	3		
<b>D</b>	+1.43					4	3	

	Avg	DO LESS			DO THE SAME	DO MORE		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+1.00					1		
<b>360</b>	+0.77				6	6	2	
<b>M</b>	+1.00					1		
<b>O</b>	+0.50				1	1		
<b>P</b>	+1.00				1	2	1	
<b>D</b>	+0.57				4	2	1	

10 Making a case for change—more about “why” and less about “how” and obstacles/constraints.

	Avg	GOT WORSE			NO CHANGE	GOT BETTER		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+1.00					1		
<b>360</b>	+0.44			1	6	6	2	
<b>M</b>	0.00				1			
<b>O</b>	+0.50				1	1		
<b>P</b>	+0.50				2	2		
<b>D</b>	+0.75			1	2	3	2	

	Avg	DO LESS			DO THE SAME	DO MORE		
		-3	-2	-1	0	+1	+2	+3
<b>Y</b>	+3.00							1
<b>360</b>	+1.50				3	6	5	1
<b>M</b>	+2.00						1	
<b>O</b>	+1.50					1	1	
<b>P</b>	+1.50					2	2	
<b>D</b>	+1.00				3	3	1	1

**Y** You    **360** Avg of M, O, P & D    **M** Manager (1)    **O** Other Senior Leaders (2)  
**P** Peers (4)    **D** Direct Reports (8)

# RANK ORDER "GOT BETTER / GOT WORSE" RATINGS

		<b>Y</b>	<b>360</b>	<b>M</b>	<b>O</b>	<b>P</b>	<b>D</b>
<b>1</b>	Listening to what others have to say.	+2.00	<b>+1.53</b>	+2.00	+1.00	+1.75	+1.38
<b>2</b>	Being less defensive and more open to other points of view.	+1.00	<b>+1.44</b>	+2.00	+1.50	+1.25	+1.00
<b>9</b>	Focusing on opportunities and possibilities more than limitations and constraints.	+2.00	<b>+1.42</b>	+2.00	+1.50	+0.75	+1.43
<b>3</b>	Collaborating with peers in other departments.	+2.00	<b>+1.41</b>	+1.00	+1.50	+1.50	+1.63
<b>5</b>	Delegating work to direct reports who demonstrate capability to do the task.	+2.00	<b>+1.16</b>	+1.00	+1.00	+0.75	+1.88
<b>7</b>	Thinking strategically.	+1.00	<b>+1.16</b>	+2.00	+0.50	+0.50	+1.63
<b>4</b>	Establishing better alignment between her department and her peers' departments.	+1.00	<b>+0.91</b>	+1.00	+0.50	+0.75	+1.38
<b>8</b>	Connecting the dots across functions and BUs in terms of value creation.	0.00	<b>+0.60</b>	+1.00	0.00	+0.50	+0.88
<b>6</b>	Coaching and developing direct reports.	+1.00	<b>+0.55</b>	+1.00	0.00	+0.33	+0.88
<b>10</b>	Making a case for change—more about "why" and less about "how" and obstacles/constraints.	+1.00	<b>+0.44</b>	0.00	+0.50	+0.50	+0.75
<b>Average across 10 behaviors</b>		+1.30	<b>+1.06</b>	+1.30	+0.80	+0.86	+1.28

**Y** You   
 **360** Avg of M, O, P & D   
 **M** Manager (1)   
 **O** Other Senior Leaders (2)  
**P** Peers (4)   
 **D** Direct Reports (8)

# RANK ORDER "DO MORE / DO LESS" RATINGS

		<b>Y</b>	<b>360</b>	<b>M</b>	<b>O</b>	<b>P</b>	<b>D</b>
<b>4</b>	Establishing better alignment between her department and her peers' departments.	+3.00	<b>+1.60</b>	+2.00	+1.50	+1.75	+1.13
<b>8</b>	Connecting the dots across functions and BUs in terms of value creation.	+3.00	<b>+1.60</b>	+2.00	+2.00	+1.25	+1.13
<b>10</b>	Making a case for change—more about "why" and less about "how" and obstacles/constraints.	+3.00	<b>+1.50</b>	+2.00	+1.50	+1.50	+1.00
<b>3</b>	Collaborating with peers in other departments.	+2.00	<b>+1.38</b>	+2.00	+1.50	+1.25	+0.75
<b>7</b>	Thinking strategically.	+2.00	<b>+1.16</b>	+1.00	+1.50	+1.50	+0.63
<b>6</b>	Coaching and developing direct reports.	+2.00	<b>+0.98</b>	+1.00	+1.00	+0.67	+1.25
<b>5</b>	Delegating work to direct reports who demonstrate capability to do the task.	+1.00	<b>+0.88</b>	+1.00	+1.00	+1.00	+0.50
<b>9</b>	Focusing on opportunities and possibilities more than limitations and constraints.	+1.00	<b>+0.77</b>	+1.00	+0.50	+1.00	+0.57
<b>1</b>	Listening to what others have to say.	0.00	<b>+0.69</b>	+1.00	+0.50	+0.75	+0.50
<b>2</b>	Being less defensive and more open to other points of view.	+1.00	<b>+0.53</b>	+1.00	0.00	+0.75	+0.38
<b>Average across 10 behaviors</b>		+1.80	<b>+1.11</b>	+1.40	+1.10	+1.14	+0.78

**Y** You  
 **360** Avg of M, O, P & D  
 **M** Manager (1)  
 **O** Other Senior Leaders (2)  
**P** Peers (4)  
 **D** Direct Reports (8)

**1. Please describe any changes that you have seen in Pat Sample's leadership since February 2023. What impact have the changes had on the organization, other people, and performance?**

*Responses are presented exactly as submitted. Each text block represents a different respondent.*

**Y** Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**M** ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**O** dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

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**D** dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

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**Y** You   **M** Manager (1)   **O** Other Senior Leaders (2)   **P** Peers (4)   **D** Direct Reports (8)

## 2. Is there anything Pat Sample could do differently—anything to do or emphasize more, anything to do or emphasize less—to be a more effective leader?

Responses are presented exactly as submitted. Each text block represents a different respondent.

**Y** Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**M** ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**O** Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
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**D** Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
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dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**Y** You   **M** Manager (1)   **O** Other Senior Leaders (2)   **P** Peers (4)   **D** Direct Reports (8)



### 3. What words of encouragement do you have for Pat Sample?

Responses are presented exactly as submitted. Each text block represents a different respondent.

**Y** Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**M** ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**O** Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**P** dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**D** dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
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Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
Lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;  
dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom; lorum ipsum dollom;

**Y** You   **M** Manager (1)   **O** Other Senior Leaders (2)   **P** Peers (4)   **D** Direct Reports (8)



#### **ABOUT THE PROGRESS REPORT (PR)**

The Progress Report provides a missing link in leadership development efforts: a simple, intuitive, and relevant measure of behavior change and improvement. The survey items are customized based on the individual's goals for development and the specific behaviors they are trying to improve. The items are rated by the individual as well as their coworkers two times: first, to provide feedback on observed improvement and, second, to provide feedforward on how to continue improving. The PR provides quality data so leaders can calibrate how much they have moved the needle as well as how to continue getting better while coaches, development professionals, and organizations can understand the impact of their efforts and investment.



#### **ABOUT KAISER LEADERSHIP SOLUTIONS (KLS)**

We are intent on raising the bar in the field of leadership assessment and development. Our innovative tools are built on research into how managers become great leaders and are designed around the practical realities of leading in today's disruptive operating environment. Visit us online to see our full range of integrated tools and services for providing the data, structure, and guidance required for development processes that demonstrably enhance the leadership capacity of individuals and organizations.



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