

Why Customized Assessments Improve Learning and Development

In June 2008, [IDC](#), a global, multi-disciplined research organization, released information related to employee assessments. This research is based upon 400 companies across the U.S. and the U.K.¹

- Organizations lacking assessment programs are more likely to experience lower awareness levels of employees' knowledge, understanding and confidence. This can be interpreted to include volunteers, as well.
- Most people have some degree of uncertainty about their roles and involvements. It is highly effective to target training and information based upon assessment results to create programs that meet individuals' needs for clarity and certainty relative to where they stand in the organization, how they can improve performance, and contribute to the organization's success.
- Assessments focused on both the individual from a holistic perspective and the organization's strategic objectives and/or mission will yield valuable information as to what resources will be the most effective at increasing employee/volunteer confidence and competence.
- Automated assessments are easy to administer, require less time and money and can be customized to deliver relevant and meaningful results.

LeaderXY Group has pioneered the integration of customized assessments to organizational objectives within a coaching methodology and proprietary technology that effectively identify and deliver learning and development solutions to reveal and release untapped human potential.

LeaderXY tools, methodologies, and technology quickly:

- **Assess**² each individual to identify where they are today when compared to where their career can take them;
- **Match** their learning and development needs with the strategic objectives of the organization;
- **Connect** individuals with relevant development, learning and coaching resources that meet each person's unique needs;
- **Create** an action plan to accelerate learning and performance improvement; and,
- **Track** competency and skill development to performance improvements.

¹ Information adapted from [Talent Management](#) article.

² LeaderXY assessments are generated by a proprietary formulation and technology that maps an individual, team, or organization onto a simple xy visual graphic. The XY Framework methodology has proven to be highly effective to get people on the same page and moving in the same direction, faster than standard facilitation, consulting, and coaching techniques.

LeaderXY Group’s tools and solutions empower you, the expert as it relates to your situation, to quickly and easily think, plan, organize, and execute a learning and performance management program customized to your organization’s unique needs and objectives.

Assess: Simple and quick assessment customized to your organization. Editing of questions can be done on the actual webpage without the aid of website developer or technology person.

Step 1 of 4: My Business Aptitude

► *This quick assessment provides you and your coach with more focused information to explore the possibilities for you based upon the comparison of where you are now with where you want to go. For each of the four statements listed below, please click the answer that best represents your current abilities and situation.*

I know how to deal with the daily fires or difficult situations that come with my role.	<input checked="" type="radio"/> Working On	<input type="radio"/> Challenged	<input type="radio"/> Improvement has been Noticed	<input type="radio"/> A Developing Strength	<input type="radio"/> Definite Strength	<input type="radio"/> Mastery
I have the basic business acumen and skills to manage my assignments. I know who to go to for help when I need it.	<input checked="" type="radio"/> Working On	<input type="radio"/> Challenged	<input type="radio"/> Improvement has been Noticed	<input type="radio"/> A Developing Strength	<input type="radio"/> Definite Strength	<input type="radio"/> Mastery
I am trusted and respected by my boss, peers, and people who report to me. They consider my ideas for solutions and I also know other people may have better ideas than mine.	<input checked="" type="radio"/> Working On	<input type="radio"/> Challenged	<input type="radio"/> Improvement has been Noticed	<input type="radio"/> A Developing Strength	<input type="radio"/> Definite Strength	<input type="radio"/> Mastery
I have extensive experience at making strategic business decisions that deliver the right solutions.	<input checked="" type="radio"/> Working On	<input type="radio"/> Challenged	<input type="radio"/> Improvement has been Noticed	<input type="radio"/> A Developing Strength	<input type="radio"/> Definite Strength	<input type="radio"/> Mastery

Please review your selections before continuing.

[Continue to Step 2](#)

Quick two step assessment – only eight questions or statements.

Step 2 of 4: Revealing My Potential

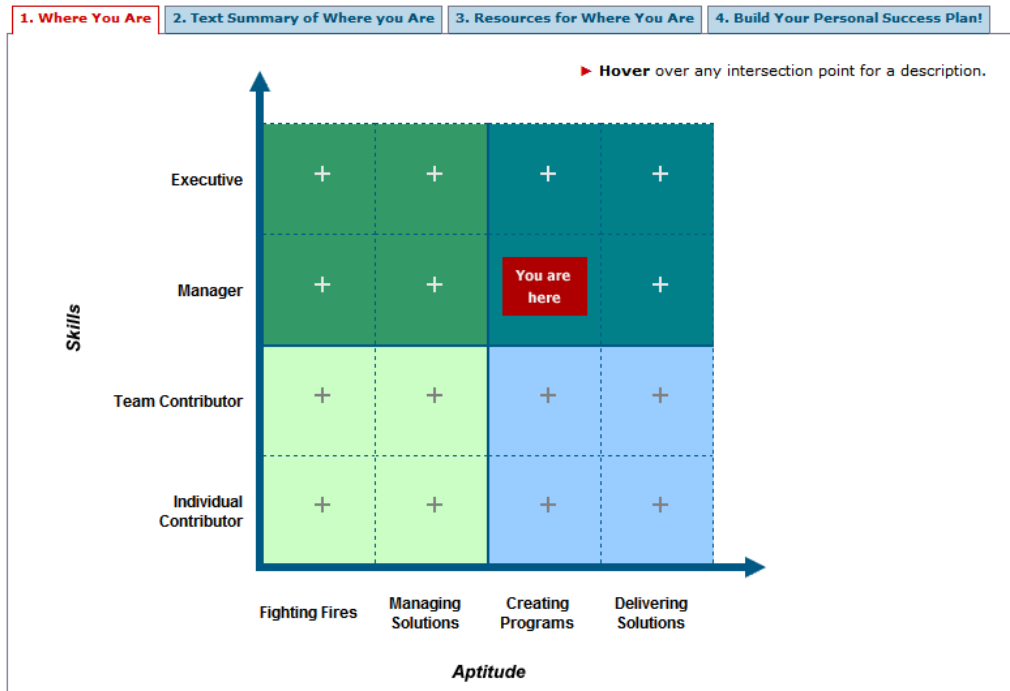
► *For each of the four statements listed below, select the answer that best represents how you view your capabilities in a variety of situations.*

As an individual contributor, I am clear about what is expected of me and I keep my commitments.	<input checked="" type="radio"/> Working On	<input type="radio"/> Challenged	<input type="radio"/> Improvement has been Noticed	<input type="radio"/> A Developing Strength	<input type="radio"/> Definite Strength	<input type="radio"/> Mastery
I work well with others and I am open to others ideas. I know my strengths and the strengths of my team members. I have a desire to find and deliver the best solution.	<input checked="" type="radio"/> Working On	<input type="radio"/> Challenged	<input type="radio"/> Improvement has been Noticed	<input type="radio"/> A Developing Strength	<input type="radio"/> Definite Strength	<input type="radio"/> Mastery
I continually look for ways to improve myself, my management abilities, and expand my capacity to manage change and deal with difficult situations.	<input checked="" type="radio"/> Working On	<input type="radio"/> Challenged	<input type="radio"/> Improvement has been Noticed	<input type="radio"/> A Developing Strength	<input type="radio"/> Definite Strength	<input type="radio"/> Mastery
I find myself consistently willing to take the lead. I am continually developing my leadership skills whether I am in a defined leadership role or not.	<input checked="" type="radio"/> Working On	<input type="radio"/> Challenged	<input type="radio"/> Improvement has been Noticed	<input type="radio"/> A Developing Strength	<input type="radio"/> Definite Strength	<input type="radio"/> Mastery

Please review your selections before continuing.

[Continue to Step 3](#)

Match: A proprietary formulation is built into the system to make it easy for an organization to develop an assessment that meets the needs of the individual relative to the organization’s mission and available resources. Quickly map where people are and deploy resources where needed and when needed.



All content within the system can be easily customized to fit the culture, mission, and strategic objectives of the organization.

1. Where You Are 2. Text Summary of Where you Are 3. Resources for Where You Are 4. Build Your Personal Success Plan!

► Based upon your responses in Steps 1 and 2, here is a general summary for you to think about and consider as the foundation for building your business growth plan.

Your Results:

Manager/ Creating Programs

More Content Coming Soon!

Focus content, training, coaching, and other materials on specific learning needs.

Connect: Easily connect people to the resources they need for personal, professional, career, management, and leadership development.

1. Where You Are 2. Text Summary of Where you Are 3. Resources for Where You Are 4. Build Your Personal Success Plan!

► The resources listed below will help you move forward in your business growth.

Learning Tools and Resources Success Library


Available Resources:

Good to Great the Book by Jim Collins
Build great teams and great companies. LeaderXY can help you become a Level 5 Leader. [Learn More](#)

KARES for Leaders: Leaders get other people on the same page and moving in the same direction. Leaders have an intensity for clarity and focus so that right decisions are made and right actions are taken by others. [Learn more](#)

An individual can use these tools for self development, or they can choose to work with a coach, or work with their manager who can act more like a coaching manager.

Instructions Messages Goals Intake My Coach My Success Plan XY Methodology My Idea Journal Resource Library


 **Test, Welcome to your personal performance improvement plan.** This tool has been designed to leverage and accelerate your performance from your coaching activities.

The results from the initial assessment provide you and your coach with an opening dialogue to clarify your situation, focus on what matters, and reveal the actions that will achieve your desired results.

- **Step 1: Chat with Your Coach**
 - Click on the **Messages Tab** to read a message from your coach. Use this message function to chat with one another.
 - A website update feature is also provided.
- **Step 2: Goals Intake Tab**
 - Click this tab to input your goals.
 - Leave a message for your coach under **Message Tab** that you have completed your goals.
- **Step 3: My Coach Tab**
 - Prepare for your next coach session. Use the Speed Coach Form to let your coach know the actions you are focused on, so your coach can target support to accelerate your results.
 - Review the coach process.
- **Step 4: My Success Plan Tab**
 - Review your personalized improvement plan (Success Plan) with your coach.
 - Complete any coach session assignments. See Assignments Tab.

Create: Provide some basic resources, such as competency trainings or specific learning materials for the person’s role. This forms the foundation for the person’s action plan. Then develop a customized plan that will provide the individual with a career development path and/or leadership development opportunities.

Instructions Messages Goals Intake My Coach **My Success Plan** XY Methodology My Idea Journal Resource Library

 **Test.** Use the resources listed below to improve your competencies, skills, and business acumen. Each resource has been carefully selected to fit your current needs.

Learning Tools and Resources Individual Assignments Success Library Resources Executive Summary


Connect with relevant and meaningful business building resources.
Targeted resources to help you learn what you need to achieve your goals and improve personal and business performance.
▶ Track your progress with the drop-down status box selections.

Business Acumen and Skills Resources:	Status:
<p>Good to Great the Book by Jim Collins Build great teams and great companies. LeaderXY can help you become a Level 5 Leader. Learn More</p>	Reading/Studying ▼
<p>KARES for Leaders: Leaders get other people on the same page and moving in the same direction. Leaders have an intensity for clarity and focus so that right decisions are made and right actions are taken by others. Learn more</p>	Completed ▼

Save Changes

One Size Does Not Fit All: Everyone has unique needs based upon their role, goals, experience, knowledge, and skills. Make it easy to assign specific actions for an individual to work on and track the status of their progress.

Instructions Messages Goals Intake My Coach **My Success Plan** XY Methodology My Idea Journal Resource Library

 **Test.** Use the resources listed below to improve your competencies, skills, and business acumen. Each resource has been carefully selected to fit your current needs.

Learning Tools and Resources **Individual Assignments** Success Library Resources Executive Summary

Individual assignments to help you reach your goals.
Assignment forms for the sales manager or sales coach to assign specific actions to an individual and track progress on those actions. (Note: the text areas on this form will have an HTML editor for including links to files and webpages. This feature is coming soon....)

First Form < No Saved Forms > Latest Form New Save

Individual Assignments for Test One

Date: 9/10/08 Assigned by: Alan


Assignment: Meet with Joe and Jane to get their buy-in on my new initiative. See if they will consider being on the team or providing advice to me. Status: In Progress ▼
Other (specify):

Response:

Track: Easily track the progress of each person you are coaching or employee who reports to you.

Alan's Coach Console Logged in as Alan G

[My Coachees](#) | [Manage Users](#) | [Coachee Reports](#) | [XY Knowledge Base](#) | [Client Road Map](#) | [My Journal](#)


Alan's Coachees (Double-click on row to open Coachee's information. Double-click column header to sort.)

Last Name	First Name	Username	Registration Date	Last Login Date
wisniewski	jeanne	jwisniewski	2008-07-25 18:01:50	2008-07-25 18:04:12
White	Donald	dwhite	2008-07-24 09:46:56	2008-07-31 11:08:08


Forms easily customized to fit the specific information that defines your business practices and processes that you know from experience and day-to-day involvement as to what is essential to be collected, tracked, and measured. You know your business and the needs of your people better than anyone else.

Coachee: **Donald White** ▶ [Close Window](#)


Username: dwhite
 Registered: 2008-07-24 09:46:56
 Last Login: 2008-07-31 11:08:08



	Current Status	Next Goal
Aptitude - Learning:	Fighting Fires	Not Selected
Skill - Performance:	Team Contributor	Not Selected

[My Notes](#) | [Coachee Forms](#) | [Coachee Plan](#) | [Message Board](#) | [Coachee XY Points](#) | [Coachee Journal](#)


 View and track Coachee Forms

[Goals Intake](#) | [Speed Coach Form](#) | [Individual Assignments](#) | [Other](#)


Donald White's Goals

First Form ◀ No Saved Forms ▶ **Latest Form** |  New |  Save

Date:

Name: Donald White

Current Situation

What is your primary goal for the next 90 days?

What two specific actions will you take to achieve this goal?

Chat with each person you are coaching.

Coachee: Donald White [Close Window](#)

Username: dwhite
 Registered: 2008-07-24 09:46:56
 Last Login: 2008-07-31 11:08:08

	Current Status	Next Goal
Aptitude - Learning:	Fighting Fires	Not Selected
Skill - Performance:	Team Contributor	Not Selected

My Notes | Coachee Forms | Coachee Plan | **Message Board** | Coachee XY Points | Coachee Journal

My Message Exchange with **Donald White**

Sent By: Date: Time:

Message:

Have a great vacation. Thanks for taking care of business.

(Click **Save** to send. Click **New** to type a reply or write another message.)

First Form < 2008-07-30 13:11:09 - Saved by Alan G > Latest Form

Keep your private notes about the person you are coaching or managing.

Coachee: Donald White [Close Window](#)

Username: dwhite
 Registered: 2008-07-24 09:46:56
 Last Login: 2008-07-31 11:08:08

	Current Status	Next Goal
Aptitude - Learning:	Fighting Fires	Not Selected
Skill - Performance:	Team Contributor	Not Selected

My Notes | Coachee Forms | Coachee Plan | Message Board | Coachee XY Points | **Coachee Journal**

My Notes about **Donald White**

Add New Entry

Date	Subject	Entry
2008-07-24 19:34:17	Don filled out his forms	comments are that it is very easy and intuitive - easy to navigate and understand. Nice to see Don getting engaged.

Journal for the employee or person you are coaching to keep other information.

Coachee: Donald White [Close Window](#)

Username: dwhite
 Registered: 2008-07-24 09:46:56
 Last Login: 2008-07-31 11:08:08

	Current Status	Next Goal
Aptitude - Learning:	Fighting Fires	Not Selected
Skill - Performance:	Team Contributor	Not Selected

My Notes | Coachee Forms | Coachee Plan | Message Board | Coachee XY Points | **Coachee Journal**

Donald White's Journal

Add New Entry

Date	Subject	Entry
2008-07-28 16:18:03	test	Trouble shoot
2008-07-28 16:13:05	New ENtry	This is a test
2008-07-28 16:12:41	New	