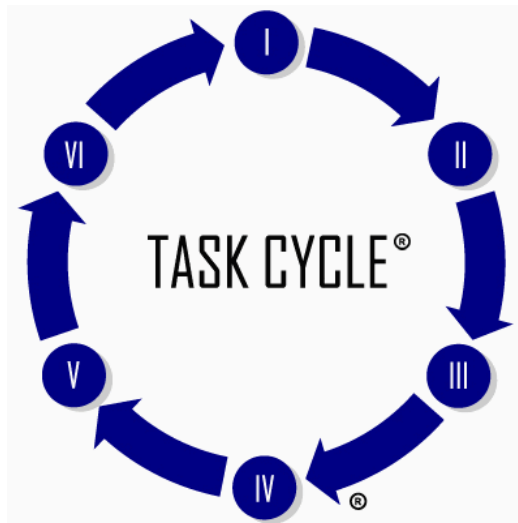


# Confidential Feedback Report

Professional, Sample, Demo Client

## Survey of Client Relations



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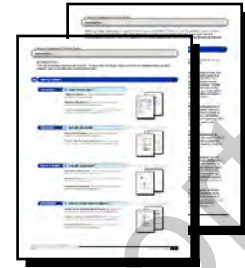
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Task Cycle® name and image are registered trademarks of The Booth Company

## Table of Contents

### Introduction

#### What's in this report?

An introduction to the report, the Task Cycle® methodology, and definitions throughout the report.



### Summaries

#### How did I do overall?

**Task Cycle® Summary:** An overall summary of your centile scores averaged by Task Cycle® phase and rater group.

**Plots of Your Raw and Centile Scores:** Line plots of your centile scores and raw scores separated by rater group.



### Scores & Details

#### How did I do in detail?

**Dimension (Skill) Scores:** Your overall scores for each Task Cycle® skill.

**Question Scores:** A detailed listing of responses for each question of the survey.

**Open-Ended Comments:** A verbatim listing of comments provided by your raters.



### Development

#### How do I create a plan to improve?

**Centile Highlights:** The Centile Highlights display an overview of your feedback, assigning centile ranks and showing each dimension, each rater, or rating group.

**Centile Scores and Blind Spot Analysis:** A ranking of your centile scores for each rater group along with a blind spot analysis for each Task Cycle® skill.

**5 Highest/Lowest Rated Questions:** A listing of your highest and lowest scoring questions separated for each rater group

**Current Centile Scores Compared to Previous Scores (this chart only shows if survey data from previous time is available):** A comparison of your current scores to your previous scores.

**Development Plan Template:** Space and guidance for creating a development plan from the results in this report.



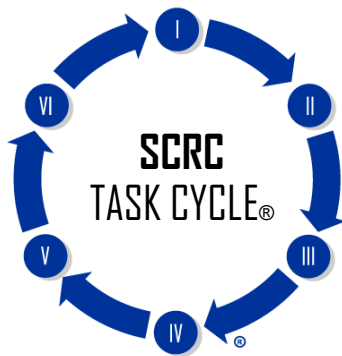
## Introduction

### What's in this report?

Before you begin analyzing this report, make sure you are mindful of what you want to achieve in your work and career. Take a few moments to also think about your present job, the people with whom you work, and the environment in which you work. Your raters draw on recent experiences, such as the last few projects or previous year, when evaluating your management practices.

### THE TASK CYCLE®

The feedback in this report is organized into six phases of activity that all executives, leaders and managers engage in, called the Task Cycle®. The Task Cycle® is a sequential, valid organizing tool that can help you know where to focus your development.



#### Task Cycle® Phases

I. ESTABLISHING RAPPORT

II. IDENTIFYING CLIENT NEEDS

III. RESPONDING TO NEEDS

IV. GAINING ACCEPTANCE

V. DRIVE

VI. ACKNOWLEDGEMENT

#### Why you should care about the Task Cycle®

1. The Task Cycle® organizes all of your feedback data into logical, business-relevant categories of action, which will help you to focus and direct your developmental activity.
2. The Task Cycle® is organized sequentially, with the phases of greatest leverage appearing first. As a result, if you focus on developing capacity in the earliest phases of the cycle, you will see the greatest benefit to your entire performance as a manager.
3. Your performance across the Task Cycle® phases predicts how others perceive the impact of your efforts.

### IMPACT OR OUTCOMES

The dimensions that make up the phases of the Task Cycle® are the fundamental skills. The Outcome or Impact dimensions that follow show the effect of the Task Cycle® skills on how others perceive you. Your skill competence is integral to the impression you make.

### KEY TERMS AND CONCEPTS

#### Raw Score

This is the actual score that was given to you by those who completed the survey.

#### Centile

This compares your scores to everyone else who has taken the survey. If your centile score for a particular skill is "30," it means that 30% of the individuals who have taken the survey scored lower than you (and 70% scored higher). Centile scores are presented frequently throughout the report, and are intended to give you a competitive analysis of how your leadership skills compare to others in similar professional situations.

#### Situational Scales (\*\*\*)

Dimensions marked with (\*\*\*) are dimensions on which high scores are not necessarily desirable. When these are the only strengths in a profile, it indicates that the leader is pushing, not leading. However, when balanced with solid leadership skills and used strategically, they can significantly enhance your leadership abilities.

#### Consistency or Differences Between Raters

Look for such distinguishing characteristics as consistencies between different rater levels. If all of your raters rated you extremely low in particular dimensions, these may be good areas in which to focus your plans for development.

Differences between scores, especially self and others, can provide very useful clues. Remember that all of your ratings depend on the visibility of your skills to different raters. Direct Reports might have a better understanding of your skills in a particular area, so their scores in that area might be more important to you than scores provided by Peers.

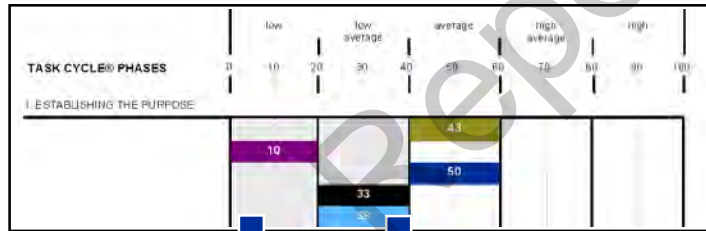
Summaries

How did I do overall?



**TASK CYCLE® SUMMARY**

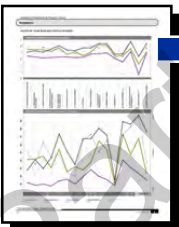
All of your centile scores are averaged and are shown for each phase of the Task Cycle®. Consider the Task Cycle® when looking at your scores, keeping in mind the importance of the Task Cycle® sequence. Its premise states that some tasks come first in time and importance. Mastery of the initial tasks influences mastery of the following tasks.



The shading in the "low" and "low average" areas of the first two phases is an area where you could be losing leverage of the Task Cycle® sequence.

Averaged centile scores are shown for each phase, broken out by rater level. The position of each colored block shows if the score is low, low average, etc.

Note that situational scales, identified by 3 asterisks (\*\*\*) are interpreted in light of the situation and therefore are not included in the summary.



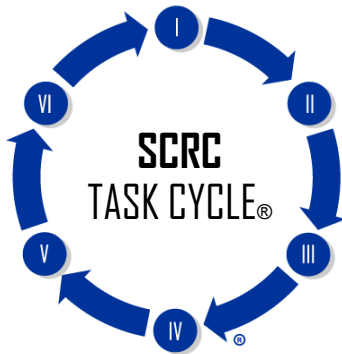
**PLOTS OF RAW AND CENTILE SCORES**

All of your raw scores for each dimension are presented separately for each rater level on the plot at the top of the page. The scores you gave yourself (via your self-survey) are also plotted. Compare different rater levels and look for trends. A legend showing the colors for each rater level is located at the bottom of the page.

The centile plot shows a summary of your scores for each dimension and serves as the primary interpretation tool for many users. All of your centile scores for each dimension are presented separately for each rater level on the plot. The scores you gave yourself are also plotted.

Summaries

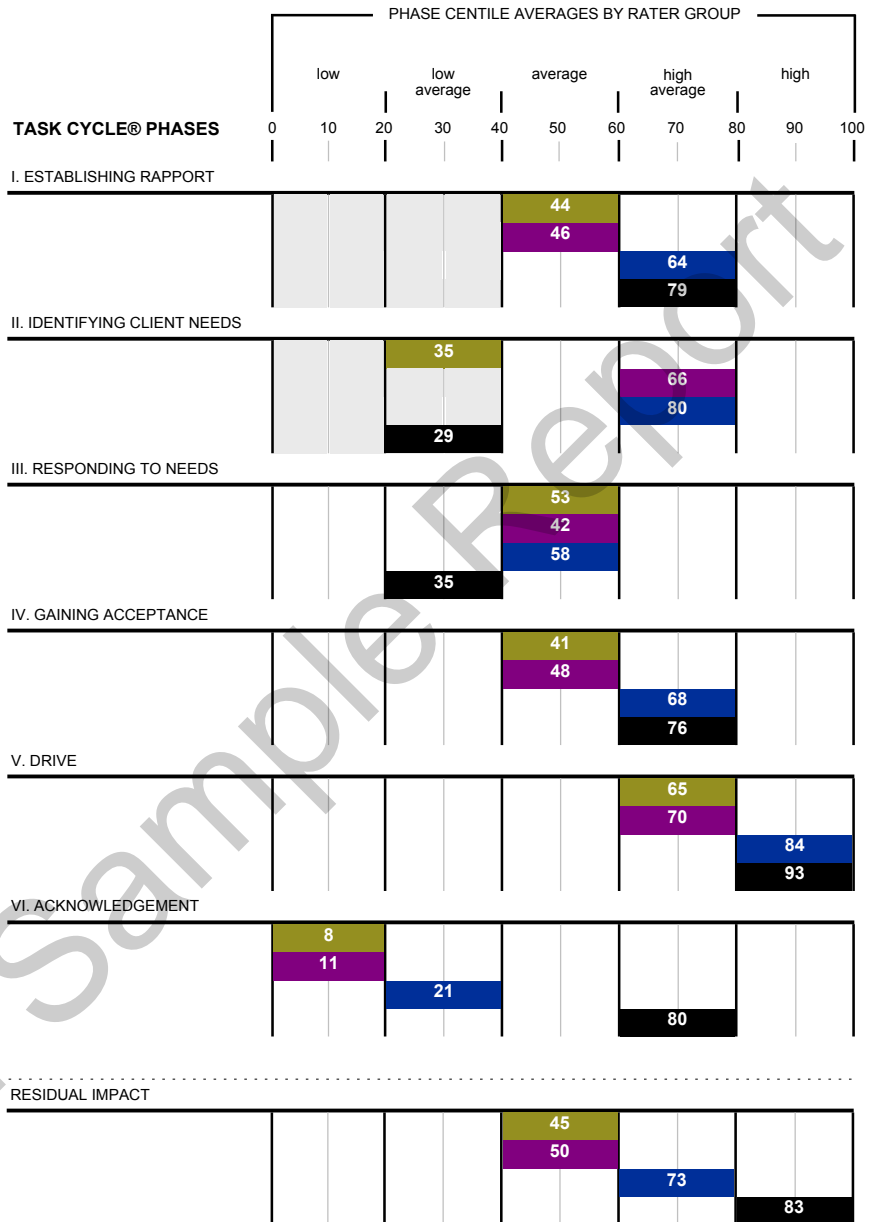
TASK CYCLE® SUMMARY



**Importance of the Task Cycle®**  
 Its premise states that some tasks come first in time and importance. Mastery of the initial tasks influences mastery of the following tasks.

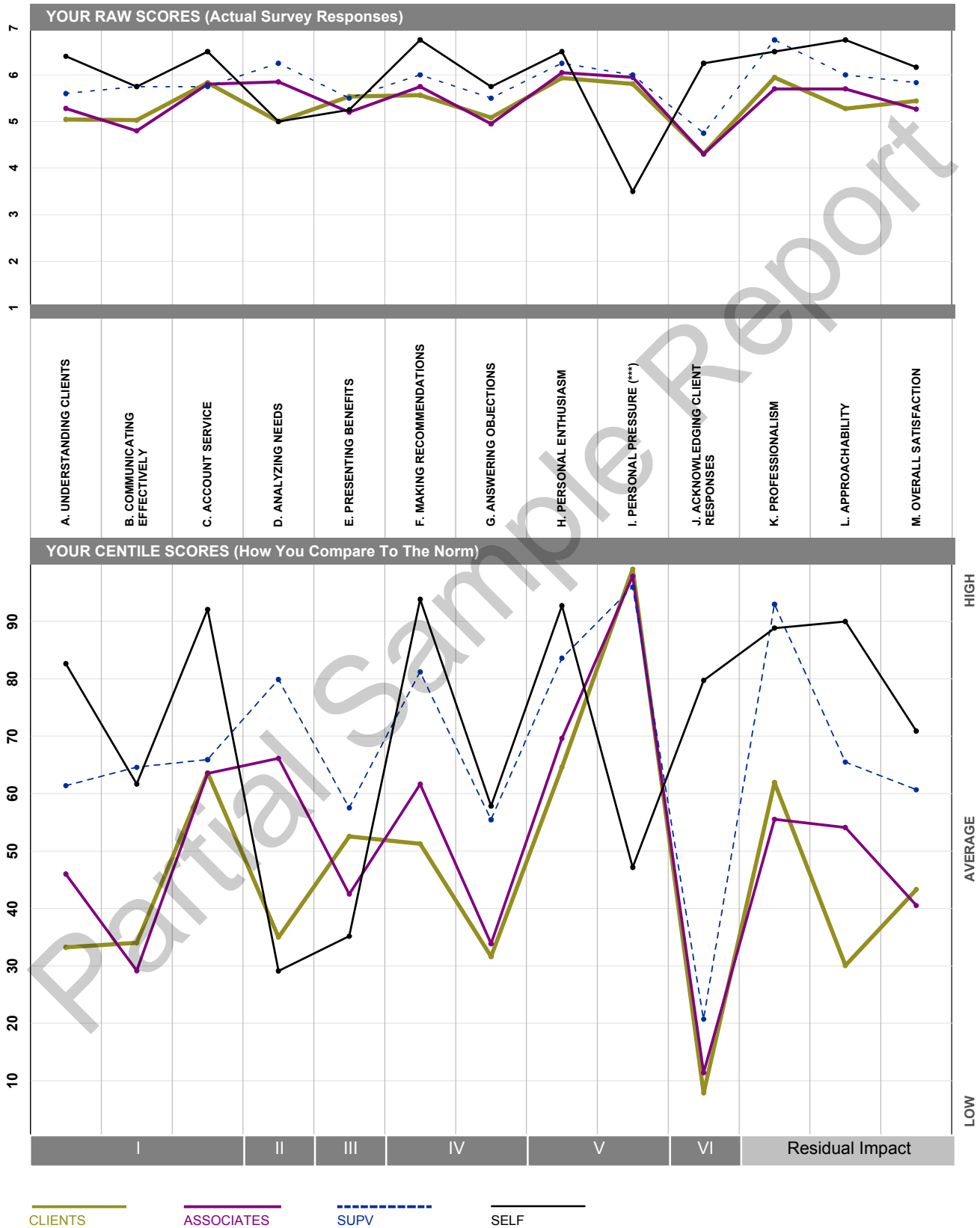
Scores that land in the shaded areas indicate an area that you may be losing leverage within the Task Cycle®. Review your dimension scores for a better analysis.

- Clients
- Associates
- Supv
- Self



**Summaries**

**PLOTS OF YOUR RAW AND CENTILE SCORES**



## Scores & Details

How did I do in detail?



### DIMENSION AND QUESTION SCORES

#### Dimension (Skill) Scores

The dimension table allows you to compare your rankings on each dimension from each rater group.

- Most participants will have separate rows for direct reports, peers, a supervisor and self.
- Peers and reports are not broken out separately when the minimum number required to protect rater anonymity are not completed by the survey deadline.

#### Question Scores

Below the dimension table you will see data for each question making up the dimension. This includes: average score, standard deviation, exact frequency of the "NR" and "1-7" ratings, and, if you have taken the survey before, previous average scores.



### OPEN-ENDED COMMENTS

Written comments from your raters shown exactly as they were entered into the web survey, without editing.

- Comments are organized according to rater levels.
- Raters were discouraged from referring to events or using language that would identify them.
- Comments are randomized within the different rating groups.

**Scores & Details**

**I. ESTABLISHING RAPPORT**

**A. Understanding Clients**

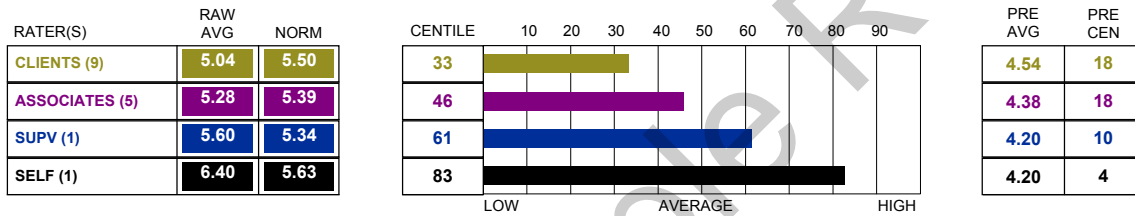
**If You Score High**

If you scored high on this dimension, your clients probably feel you understand their organization well enough to address their needs and tailor your products or services to their needs. You are probably considered an expert in how your organization can serve its clients.

**If You Score Low**

If you scored very low on this dimension, you may be considered to be lacking in your understanding of the intricacies of your client's organization and its unique perspective. Without a good understanding of your client's organization, your analysis of client needs will be off-target as will your response to those needs. Your effectiveness may improve if you work to understand the character of the organization and its mission more completely.

**Dimension Scores**



**Development Tips**

If this dimension is an area for improvement, here are some suggestions.

- Assess the amount of technical and organizational knowledge you need in your position in order to serve your clients. Identify the resources available to you. These include staff members, cross-team members, managers and peers, or trusted external consultants.
- Build an informal network of peers in your own and similar organizations through which you exchange ideas and discuss issues relevant to changes in your field.
- Read professional newsletters and trade journals. These publications can keep you up-to-date on new developments in the industry and community in which you work.
- Realize that part of your role is listening to concerns and problems. You need to know what people are thinking and feeling in your client's organization and across the industry.
- If invited, attend your clients' organizational functions and get to know a variety of people in the organization. Listen carefully to their concerns when they interact with each other.



Scores & Details

Question Scores

↓ Question # within survey	AVG	SD	NR	1 - not rated, N/A	1 - never...	2 - almost never...	3 - sometimes...	4 - average	5 - often...	6 - almost always...	7 - always...	PRE AVG
9. Is a good listener; tries to understand the client's point of view	CLIENTS	5.8	1.2	.	.	.	.	2	1	3	3	5.4
	ASSOCIATES	6.2	1.3	.	.	.	.	1	.	1	3	4.5
	SUPV	7.0	---	.	.	.	.	.	.	.	1	6.0
	SELF	6.0	---	.	.	.	.	.	.	1	.	6.0
15. Makes an effort to comprehend the special nature of the client's business	CLIENTS	5.3	1.2	.	.	.	.	3	2	2	2	4.5
	ASSOCIATES	5.2	1.3	.	.	.	1	.	1	3	.	4.3
	SUPV	7.0	---	.	.	.	.	.	.	.	1	5.0
	SELF	7.0	---	.	.	.	.	.	.	.	1	4.0
20. Is knowledgeable about the mission and character of the client's business	CLIENTS	5.9	1.1	.	.	.	.	1	2	3	3	5.1
	ASSOCIATES	5.4	0.9	.	.	.	.	1	1	3	.	4.8
	SUPV	4.0	---	.	.	.	.	1	.	.	.	4.0
	SELF	6.0	---	.	.	.	.	.	.	1	.	4.0
26. Understands the client's way of thinking about their needs	CLIENTS	6.2	1.1	.	.	.	.	1	1	2	5	5.5
	ASSOCIATES	5.8	1.6	.	.	.	1	.	.	2	2	5.0
	SUPV	7.0	---	.	.	.	.	.	.	.	1	5.0
	SELF	7.0	---	.	.	.	.	.	.	.	1	6.0
48. Attempts to see things from the client's perspective	CLIENTS	2.0	1.1	.	4	2	2	1	.	.	.	2.2
	ASSOCIATES	3.8	1.8	.	1	.	.	3	.	1	.	3.0
	SUPV	3.0	---	.	.	.	1	.	.	.	.	1.0
	SELF	6.0	---	.	.	.	.	.	.	1	.	1.0

**Scores & Details**

**OPEN-ENDED COMMENTS**

**What does this person do that should be continued?**

**All Others**

- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*
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- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*

**Self**

- ▶ *Survey received; no comment provided.*

Partial Sample Report

**Scores & Details**

**OPEN-ENDED COMMENTS**

***What should this person do to be more effective?***

**All Others**

- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*
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- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*

**Self**

- ▶ *Survey received; no comment provided.*

Partial Sample Report

**Scores & Details**

**OPEN-ENDED COMMENTS**

**What does this person do that should be stopped?**

**All Others**

- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*
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- ▶ *Survey received; no comment provided.*
- ▶ *Survey received; no comment provided.*

**Self**

- ▶ *Survey received; no comment provided.*

Partial Sample Report

## Development

How do I create a plan to improve?

**CENTILE HIGHLIGHTS**

Centile Highlights displays an overview of your feedback, assigning centile ranks for each dimension by rater group. This presentation shows the differences and similarities in the perspectives.

This is the same information, compressed to 20-point ranges, as the Centile Plot.

**CENTILE SCORES AND BLIND SPOT ANALYSIS**

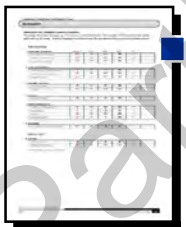
This chart shows your centile scores broken out by rater group. Shading and centile ranking designations help you identify whether your scores are considered Low, Low Average, Average, High Average or High.

A blind spot analysis is shown to the right of each dimension. This analysis compares the specified rater group's centile scores with your Self scores. This comparison will help you determine whether or not a particular dimension (skill) is considered a Blind Spot or Strength (see explanations below the chart). Situational dimensions marked with (\*\*\*) are not included in the Blind Spot Analysis. These dimensions need to be interpreted in light of the situation and high scores may not be desired.

**5 HIGHEST/LOWEST RATED QUESTIONS**

This chart lists the highest and lowest rated questions by rater group. In each case you will see the questions identified by the dimension title and question number.

Note that questions falling under situational dimensions and/or the Impact/Outcome section are not included in the 5 Highest/Lowest charts.

**CURRENT CENTILE SCORES COMPARED TO PREVIOUS SCORES**

This chart shows the range of numeric changes, up (+) or down (-) from your previous centile scores. For example, +20 means that the centile rank went up 20 points or you have improved. Shading is used in this chart to indicate that the centile score has decreased from your previous centile scores.

Understanding where your scores have decreased or increased can aid you in creating or adjusting your development plan.

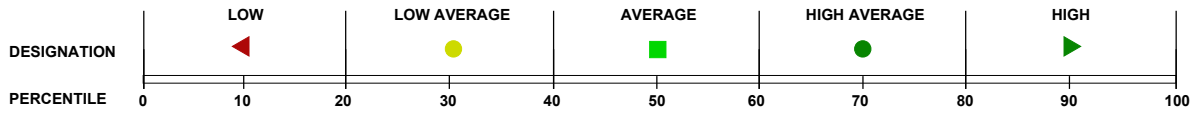
**DEVELOPMENT PLAN TEMPLATE**

These pages provide you with space to create a development plan based on your results. Before you begin creating your development plan, you'll need to read and understand the results from this report.

**Development**

**CENTILE HIGHLIGHTS**

These comparisons are in reference to the norms for each rating group.



**TASK CYCLE SKILLS**

**I. ESTABLISHING RAPPORT**

	CLIENTS	ASSOCIATES	SUPV	SELF
A. UNDERSTANDING CLIENTS	●	■	●	▶
B. COMMUNICATING EFFECTIVELY	●	●	●	●
C. ACCOUNT SERVICE	●	●	●	▶

**II. IDENTIFYING CLIENT NEEDS**

D. ANALYZING NEEDS	●	●	▶	●
--------------------	---	---	---	---

**III. RESPONDING TO NEEDS**

E. PRESENTING BENEFITS	■	■	■	●
------------------------	---	---	---	---

**IV. GAINING ACCEPTANCE**

F. MAKING RECOMMENDATIONS	■	●	▶	▶
G. ANSWERING OBJECTIONS	●	●	■	■

**V. DRIVE**

H. PERSONAL ENTHUSIASM	●	●	▶	▶
I. PERSONAL PRESSURE (***)	▶	▶	▶	■

**VI. ACKNOWLEDGEMENT**

J. ACKNOWLEDGING CLIENT RESPONSES	◀	◀	●	▶
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**RESIDUAL IMPACT**

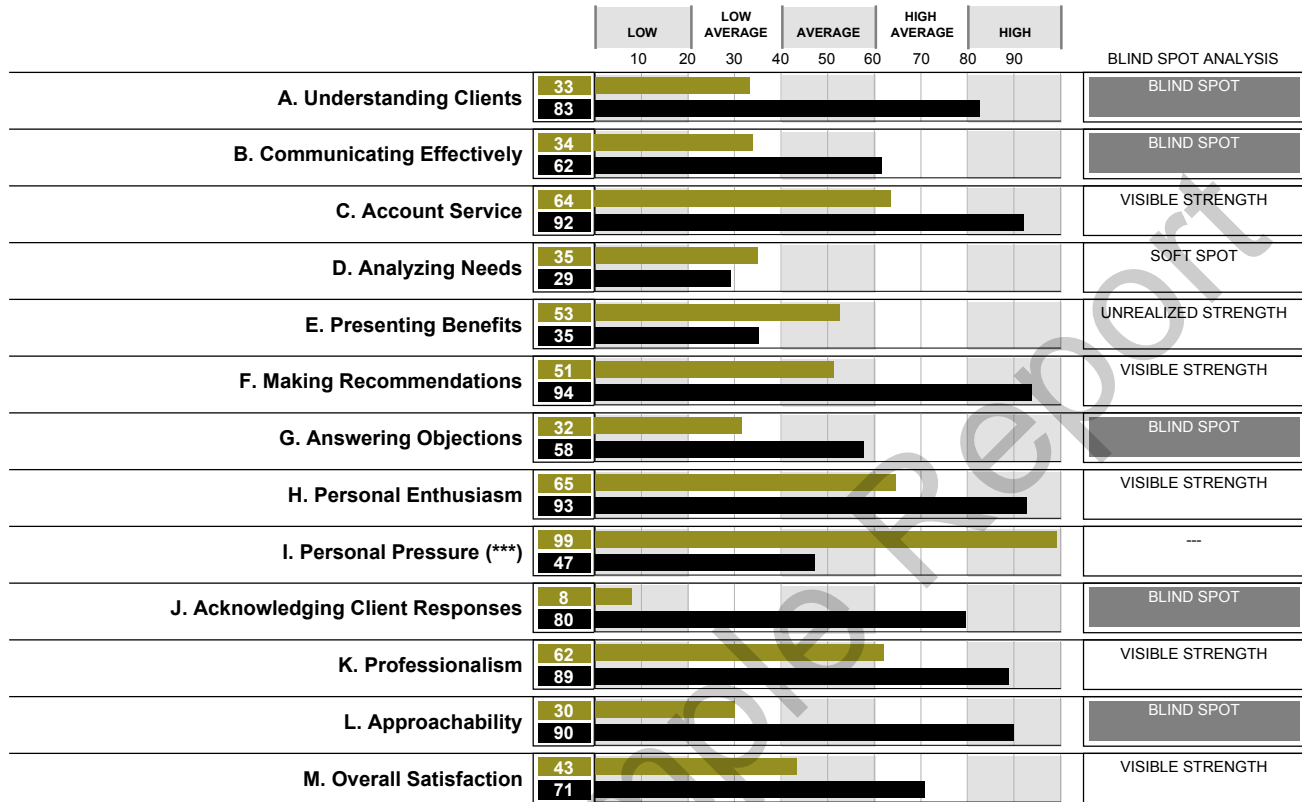
**IMPT. RESIDUAL IMPACT**

K. PROFESSIONALISM	●	■	▶	▶
L. APPROACHABILITY	●	■	●	▶
M. OVERALL SATISFACTION	■	■	●	●

(\*\*\*) Must be interpreted in light of the situation.

**Development**

**CENTILE SCORES & BLIND SPOT ANALYSIS FOR CLIENTS**



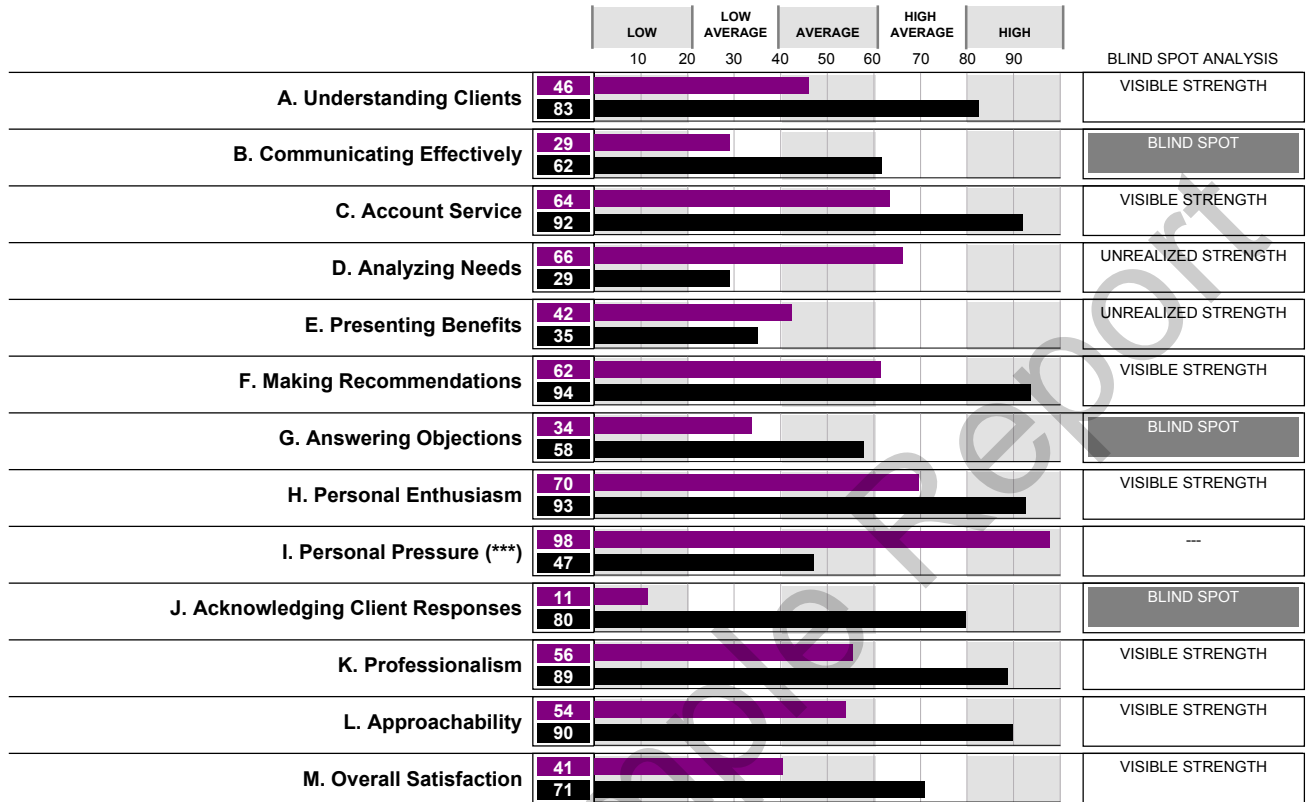
■ Clients  
 ■ Self

VISIBLE STRENGTH = Rated AVERAGE, HIGH AVERAGE or HIGH by others and yourself  
 UNREALIZED STRENGTH = Rated LOW or LOW AVERAGE by yourself, while rated AVERAGE, HIGH AVERAGE or HIGH by others  
 SOFT SPOT = Rated LOW or LOW AVERAGE by others and yourself  
 BLIND SPOT = Rated AVERAGE, HIGH AVERAGE or HIGH by yourself, while rated LOW or LOW AVERAGE by others

Partial Survey Report

**Development**

**CENTILE SCORES & BLIND SPOT ANALYSIS FOR ASSOCIATES**



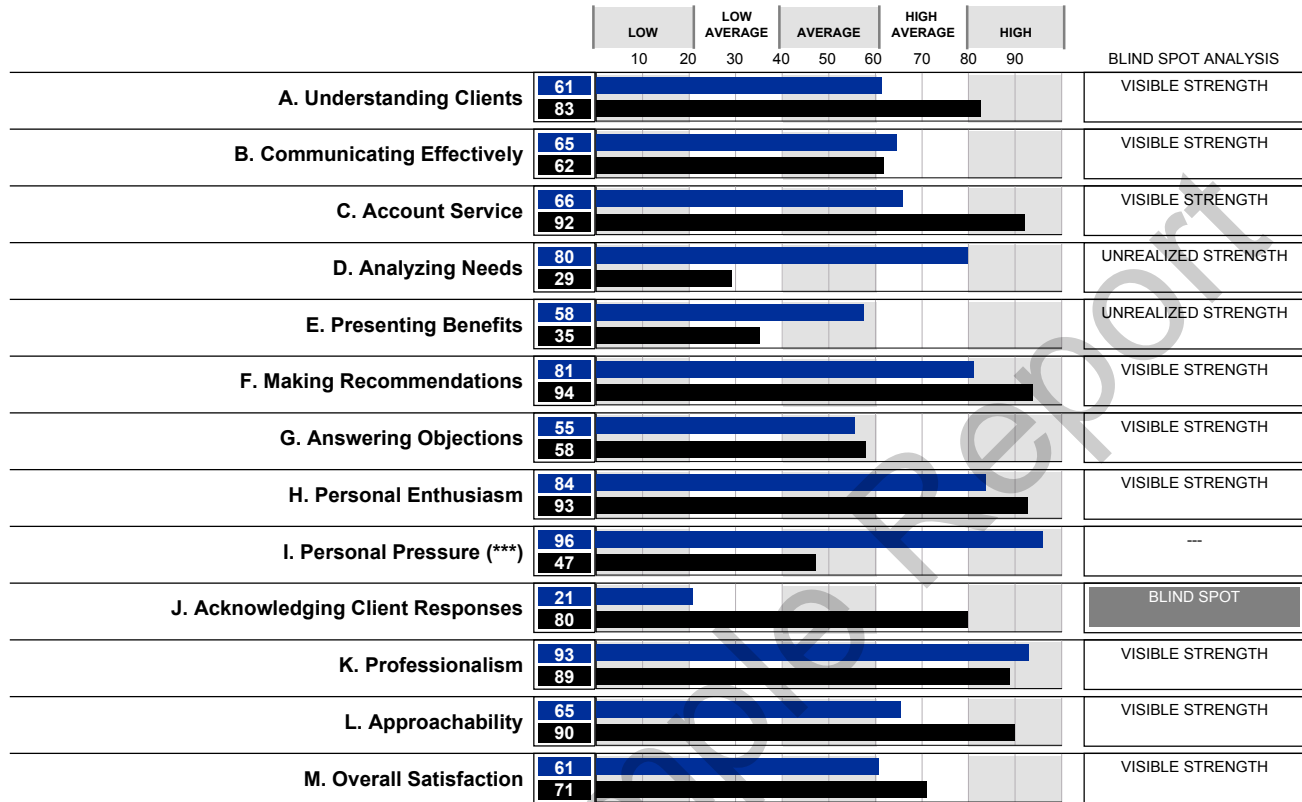
■ Associates  
■ Self

VISIBLE STRENGTH = Rated AVERAGE, HIGH AVERAGE or HIGH by others and yourself  
 UNREALIZED STRENGTH = Rated LOW or LOW AVERAGE by yourself, while rated AVERAGE, HIGH AVERAGE or HIGH by others  
 SOFT SPOT = Rated LOW or LOW AVERAGE by others and yourself  
 BLIND SPOT = Rated AVERAGE, HIGH AVERAGE or HIGH by yourself, while rated LOW or LOW AVERAGE by others



Development

CENTILE SCORES & BLIND SPOT ANALYSIS FOR SUPV



■ Supv  
 ■ Self

VISIBLE STRENGTH = Rated AVERAGE, HIGH AVERAGE or HIGH by others and yourself  
 UNREALIZED STRENGTH = Rated LOW or LOW AVERAGE by yourself, while rated AVERAGE, HIGH AVERAGE or HIGH by others  
 SOFT SPOT = Rated LOW or LOW AVERAGE by others and yourself  
 BLIND SPOT = Rated AVERAGE, HIGH AVERAGE or HIGH by yourself, while rated LOW or LOW AVERAGE by others

## Development

## 5 HIGHEST/LOWEST RATED QUESTIONS FROM YOUR CLIENTS

## 5 highest rated questions

# Question	Dimension	CLIENTS
8. Keeps clients informed about new products and technology	C. ACCOUNT SERVICE	6.44
23. Seems to be highly motivated to do good work	H. PERSONAL ENTHUSIASM	6.44
42. Treats questions or objections seriously	G. ANSWERING OBJECTIONS	6.33
26. Understands the client's way of thinking about their needs	A. UNDERSTANDING CLIENTS	6.22
27. Is diplomatic when encouraging clients to make up their minds	F. MAKING RECOMMENDATIONS	6.22

## 5 lowest rated questions

# Question	Dimension	CLIENTS
48. Attempts to see things from the client's perspective	A. UNDERSTANDING CLIENTS	2.00
51. Handles business relationships with clients in a very satisfactory way	M. OVERALL SATISFACTION	2.11
36. Answers concerns from clients logically and constructively	G. ANSWERING OBJECTIONS	2.56
49. Expresses appreciation for clients' willingness to listen to recommendations	J. ACKNOWLEDGING CLIENT RESPONSES	2.89
50. Is warm and friendly with most people	L. APPROACHABILITY	3.22

## Development

## 5 HIGHEST/LOWEST RATED QUESTIONS FROM YOUR ASSOCIATES

## 5 highest rated questions

# Question	Dimension	ASSOCIATES
5. Is highly motivated to get things done on time	H. PERSONAL ENTHUSIASM	6.60
27. Is diplomatic when encouraging clients to make up their minds	F. MAKING RECOMMENDATIONS	6.40
23. Seems to be highly motivated to do good work	H. PERSONAL ENTHUSIASM	6.40
9. Is a good listener; tries to understand the client's point of view	A. UNDERSTANDING CLIENTS	6.20
1. Treats clients professionally in personal contacts and correspondence	K. PROFESSIONALISM	6.20

## 5 lowest rated questions

# Question	Dimension	ASSOCIATES
51. Handles business relationships with clients in a very satisfactory way	M. OVERALL SATISFACTION	2.20
49. Expresses appreciation for clients' willingness to listen to recommendations	J. ACKNOWLEDGING CLIENT RESPONSES	2.40
36. Answers concerns from clients logically and constructively	G. ANSWERING OBJECTIONS	2.80
24. Speaks clearly and to the point in conversations	B. COMMUNICATING EFFECTIVELY	3.00
48. Attempts to see things from the client's perspective	A. UNDERSTANDING CLIENTS	3.80

## Development

## 5 HIGHEST/LOWEST RATED QUESTIONS FROM YOUR SUPV

## 5 highest rated questions

# Question	Dimension	SUPV
9. Is a good listener; tries to understand the client's point of view	A. UNDERSTANDING CLIENTS	7.00
15. Makes an effort to comprehend the special nature of the client's business	A. UNDERSTANDING CLIENTS	7.00
26. Understands the client's way of thinking about their needs	A. UNDERSTANDING CLIENTS	7.00
30. Conveys technical information in a clear, straightforward way	B. COMMUNICATING EFFECTIVELY	7.00
12. Asks intelligent questions to help clients identify their needs	D. ANALYZING NEEDS	7.00

## 5 lowest rated questions

# Question	Dimension	SUPV
48. Attempts to see things from the client's perspective	A. UNDERSTANDING CLIENTS	3.00
36. Answers concerns from clients logically and constructively	G. ANSWERING OBJECTIONS	3.00
49. Expresses appreciation for clients' willingness to listen to recommendations	J. ACKNOWLEDGING CLIENT RESPONSES	3.00
20. Is knowledgeable about the mission and character of the client's business	A. UNDERSTANDING CLIENTS	4.00
54. Focuses discussions on fitting the client's real requirements	E. PRESENTING BENEFITS	4.00

## Development

## 5 HIGHEST/LOWEST RATED QUESTIONS FROM YOUR SELF

## 5 highest rated questions

# Question	Dimension	SELF
15. Makes an effort to comprehend the special nature of the client's business	A. UNDERSTANDING CLIENTS	7.00
26. Understands the client's way of thinking about their needs	A. UNDERSTANDING CLIENTS	7.00
53. Communicates his or her ideas very clearly	B. COMMUNICATING EFFECTIVELY	7.00
8. Keeps clients informed about new products and technology	C. ACCOUNT SERVICE	7.00
52. Promptly passes along any information that might be of interest to clients	C. ACCOUNT SERVICE	7.00

## 5 lowest rated questions

# Question	Dimension	SELF
24. Speaks clearly and to the point in conversations	B. COMMUNICATING EFFECTIVELY	4.00
36. Answers concerns from clients logically and constructively	G. ANSWERING OBJECTIONS	4.00
51. Handles business relationships with clients in a very satisfactory way	M. OVERALL SATISFACTION	4.00
6. Is helpful in analyzing client needs and requirements	D. ANALYZING NEEDS	5.00
12. Asks intelligent questions to help clients identify their needs	D. ANALYZING NEEDS	5.00

## Development

**CURRENT CENTILE SCORES COMPARED TO PREVIOUS SCORES**

The range of numeric changes, up (+) or down (-) are shown below. For example, +20 means that the centile rank went up 20 points. Shading indicates the centile score has decreased from your previous centile scores.

**TASK CYCLE® SKILLS**

	CLIENTS	ASSOCIATES	SUPV	SELF	
<b>I. ESTABLISHING RAPPORT</b>					
A. UNDERSTANDING CLIENTS	+15	+28	+51	+79	
B. COMMUNICATING EFFECTIVELY	+19	+12	+32	+61	
C. ACCOUNT SERVICE	+16	+30	+10	+31	
<b>II. IDENTIFYING CLIENT NEEDS</b>					
D. ANALYZING NEEDS	-12	+27	+8	0	
<b>III. RESPONDING TO NEEDS</b>					
E. PRESENTING BENEFITS	+14	+11	+11	+10	
<b>IV. GAINING ACCEPTANCE</b>					
F. MAKING RECOMMENDATIONS	+4	+13	+9	+73	
G. ANSWERING OBJECTIONS	+10	+21	+19	+43	
<b>V. DRIVE</b>					
H. PERSONAL ENTHUSIASM	+20	+28	0	+72	
I. PERSONAL PRESSURE (***)	+1	+5	0	-44	
<b>VI. ACKNOWLEDGEMENT</b>					
J. ACKNOWLEDGING CLIENT RESPONSES	+3	+6	+16	+79	
<b>RESIDUAL IMPACT</b>					
<b>IMPT. RESIDUAL IMPACT</b>					
K. PROFESSIONALISM	+16	+33	+51	+61	
L. APPROACHABILITY	+11	+30	+58	+58	
M. OVERALL SATISFACTION	+13	+22	-14	+69	

(\*\*\*) Must be interpreted in light of the situation.

## Development

### DEVELOPMENT PLAN

Summarize your feedback from each rater below to help identify an area for improvement.

CLIENTS
List Key Strengths
List Key Challenges

ASSOCIATES
List Key Strengths
List Key Challenges

SUPV
List Key Strengths
List Key Challenges

Enter your most important business objectives and career goals. These are the best guides for deciding what to do about the strengths and challenges that you summarized above.

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Development Focus. Consider your challenges in light of what you need to achieve in the near future and remember that Phases I & II of the Task Cycle® are where you get the most leverage. Note below your priorities for development before lining out one or more development items in the next section.

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# Development

## DEVELOPMENT PLAN

 Print or photocopy this page for additional development items and/or actions

### Development Item(s)

**Business or career goals** (Refer to previous page)

**What skills, practices or knowledge do you need to focus on at this time?**

### Development Action(s)

What action(s) are you going to take?	By when?

**Success Indicators** (How will you know you're improving?)

**What resources do you need?**