



Management Report

RICARDO SAMPLE

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Management Report

The primary purpose of this management Report is to provide you, the supervisor, with information concerning RICARDO's significant behavioral tendencies and preferred style of performing his job. This information is intended to augment, and not replace, any other sources of work related data. This report will confirm or clarify your impressions, and alert you to new considerations, regarding RICARDO's compatibility with the demands of his position. You will also get a good picture of his potential for growth and development within your organization.

This report will help you to understand your employees better in all aspects of your work with them. Combined with your knowledge of their work performance, this information can help you better understand any difficulties that an employee might be encountering. It also contains valuable information with respect to training needs.

SUMMARY OF PRIMARY BEHAVIORAL TENDENCIES

This section of the report summarizes RICARDO's typical behavioral tendencies with regard to five critical job-related components. The purpose of this information is to help you to identify and make full use of RICARDO's strengths, and to help him to manage those areas that might be limiting his effectiveness.

I - Productivity

- Usually, he is effective at setting priorities and at estimating the time required to complete a task.
- He prefers carefully defined procedures, job descriptions, guidelines and policies.
- Typically, he takes the time to plan ahead and organize his own work.
- In developing work methods, he will contribute to greater efficiency.
- He is effective at establishing processes and procedures for getting work done.
- Generally, he believes that responsibilities should be assigned in a systematic manner.
- He prefers to do things correctly the first time.

II - Quality of Work

- He prefers to receive specific, detailed instructions.
- He might experience frustration when held accountable for quality results while having only limited control over those factors that directly impact quality.
- A perfectionist, he has a tendency to do the important work himself so as to be sure that it will be done correctly.
- Usually, he shows a sense of commitment to quality and accuracy.
- He prefers a systematic, comprehensive approach.
- Accurate and thorough, he shows close attention to detail.

III - Initiative

- With a strong tendency to prefer a perfect product, service or solution, he could lose sight of other realities, such as consistent productivity or critical deadlines.
- RICARDO prefers not to respond to others without first evaluating possible reactions and consequences, as he needs sufficient time to analyze and plan.
- RICARDO tends to be a careful decision maker. He will gather information and assess possible risks before making decisions.
- He will follow policies and procedures well.
- Generally, he is capable of working effectively without close supervision when the task and objectives are clearly defined.
- Task-oriented, he is a conscientious personal producer.

IV - Teamwork

- He prefers a reserved, impersonal, businesslike approach to doing business.
- Using formal, written communication, he tends to document discussions.
- He tends to avoid discussions of personal information or socializing during team meetings.
- In group situations, he tends to adopt a formal manner.
- He is inclined to respond to logic more than to emotional data.

V - Problem Solving

- RICARDO takes pride in looking at a problem in depth, approaching work in an accurate manner.
- Preferring to look at problems and opportunities in an objective, critical manner, he takes pride in staying calm and being analytical in high-pressure situations.
- He emphasizes objectivity- facts, data, logic - as opposed to a more emotional basis for solving problems.
- Inclined to use a systematic, analytical approach to problem solving, he is good at considering many different variables, contributing factors and possible consequences while developing a solution.
- He defines, clarifies, criticizes and tests ideas.
- Unimpressed by passing fads, he challenges the easy answers.
- Because RICARDO tends to be impersonal, precise and factual, he focuses on what needs to be done: how, why, when and by whom.

SUGGESTIONS FOR INCREASED EFFECTIVENESS

This section relates to some behavioral tendencies that RICARDO might want to modify or improve. The significance of these behavioral tendencies takes on meaning as they are related to his current position, career and/or personal goals.

I - Productivity

- Become more realistic about how much he can do. Guard against over-thinking his decisions - do it now.
- When appropriate, look for possible shortcuts to make work routines more efficient and productive.
- Examine each task for ways of accomplishing it more quickly and effectively. Start with the end goal and look for the best ways of getting there. He should remember that the best way might be new or unconventional.
- Try to spend less time on low priority tasks, balancing quality results with timely results.
- Focus more on the key critical details than on the less important details.
- Look for possible shortcuts for making his work routines more efficient.

II - Quality of Work

- Avoid becoming defensive to comments about his decisions, opinions and performance.
- Avoid becoming so guarded that he loses touch with his creativity.
- Develop a more realistic assessment of practical limits and of the limitations of others.
- Learn to develop a greater tolerance for the reality of conflict among people, and of human imperfection.
- He might become more open to alternative ways of doing things.

III - Initiative

- Accept that everyone makes mistakes but successful persons learn from those mistakes.
- Develop the ability to move forward with a project while making some decisions and/or adjustments along the way.
- Take responsibility for a problem if it is not very clear who is responsible for it. Do not be afraid of stepping on another's turf.
- Always be on the lookout for changes that will accomplish results more quickly or more effectively.

IV - Teamwork

- Develop the ability to delegate tasks to others.
- When working with others, remember to acknowledge their accomplishments.
- Share more of his ideas and feelings, when appropriate, and participate more in meetings.
- Try to accept and appreciate another person's style or approach to doing things. Look for mutual benefits in their solutions.
- If he rejects an idea or opinion, explain his reasoning. Be prepared to explain his thinking to others.
- Learn to understand the different types of talents and interest levels found in other individuals. This can be helpful in achieving his desired objectives.
- Become more willing to share ideas and information with others in a less condescending manner.

V - Problem Solving

- He should try to reduce rigidity in his thinking along with his need to be absolutely right.
- Develop the ability to be in touch with the feel of a situation as well as the objective facts.
- Because he has a desire to have sufficient time to study a problem and think through possible alternative solutions before taking action, he needs to learn to distinguish between which solutions require additional study, and which require immediate action.
- Avoid spending so much time analyzing a problem that the solution comes too late to be effective.
- Identify and spend more time on the most difficult problems.
- Instead of choosing the one best solution, identify the benefits from each alternative solution. Try to generate a solution that yields the most important benefits from each alternative.

RESPONSE TO JOB-RELATED STRESS, FRUSTRATION AND/OR CONFLICT

When experiencing stress, frustration and/or conflict in a job setting, RICARDO may:

- Use facts and logical arguments to overcome objectives.
- Weigh the pros and cons, see the trade-off in situations.
- Think before responding, checking facts first.
- Rely heavily on data, analysis and logic to make decisions.
- Thoroughly examine and study people's needs and the situation.
- Take stock, analyze the situations and examine the pros and cons of alternatives.

If, however, the level of stress, frustration and/or conflict becomes intense and/or continues over an extended period of time, there may be a tendency to:

- Not be flexible enough to provide concessions which would help solve the problem.
- Over-think and over-analyze decisions and fail to make decisive recommendations.
- Become so involved in documenting his position that others are frustrated with this detail.
- Not appreciate new ideas or respond enthusiastically to change.
- Appear to comply, but fail to follow through with expected actions.
- Become so systematic that the urgency in a situation is overlooked.
- Become overly critical of himself and others and take an extreme position.

WORK MOTIVATION

This section of the report describes the different types of incentives, rewards and conditions that are most compatible with RICARDO's behavioral tendencies and motivational style. In motivating him, consider providing:

- The opportunity to be critical and analytical.
- Time to think it through, to deliberate solutions.
- The assurance that identified and agreed upon standards and objectives will not be changed or sacrificed.
- Personal autonomy, the opportunity to work independently.
- An environment where high quality standards are important.
- Written operating procedures.
- Limited exposure to being pressured or rushed.
- Exact job descriptions.
- The opportunity for careful planning.
- The need to do things the right way.
- The opportunity to use objective arguments.
- A reserved, business-like, work environment.

MOTIVATIONAL ENERGY

Motivational Energy (ME) reflects the intensity that an individual shows and how he approaches most situations. RICARDO's ME indicates that he will approach most situations with a moderate intensity and suggests that he might be inclined to show one or more of the following behavioral tendencies:

- A craftsperson, RICARDO likes to see things done correctly. Consequently, he can be overly critical of others who do not maintain his high standards.
- Sometimes, he encounters difficulty making decisions under pressure. Typically, these problems arise when he is caught up in the details of a problem.
- Tending to adopt an extremely formal manner in group situations, he creates distance from others and can appear withdrawn to co-workers.