



**EXCEL VIEW™**

**360° COACH Report Feedback**

Solutions for Effective Performance





Provided For:  
**Ms Jane Doe**

# Excel View Demographics

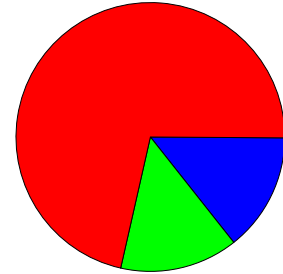
Jane Doe

Date: 09/06/2006

## My relationship to the subject is

	Self
	Supervisor
	Direct Report
	Internal Client
	TOTALS

Frequency	Percentage
1	14.29
1	14.29
5	71.43
0	0
7	100%



# Excel View Category Scores

Jane Doe

Date: 09/06/2006

## People Interactions

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3.16		
Direct Report, Internal Client: 5	3.7		

## Coaching

	Strongly Disagree		Strongly Agree
Self: 1	3.07		
Supervisor: 1	3.23		
Direct Report, Internal Client: 5	3.73		

## Communication

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.65		

## Trust

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3.42		
Direct Report, Internal Client: 5	3.75		

# Excel View Category Scores

Jane Doe

Date: 09/06/2006

## Listening Skills

	Strongly Disagree	Strongly Agree
Self: 1	3	
Supervisor: 1	3.42	
Direct Report, Internal Client: 5	3.65	

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

## People Interactions

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3.16		
Direct Report, Internal Client: 5	3.7		

1. Contributes ideas, asks questions, listens, raises issues constructively.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

2. Is open to considering other points of view.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.4		

3. Establishes cooperative and positive relationships with associates.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

4. Maintains a high level of respect for others.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

5. Models versatility in dealing with others.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

6. Does not talk down to others.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

**Coaching**

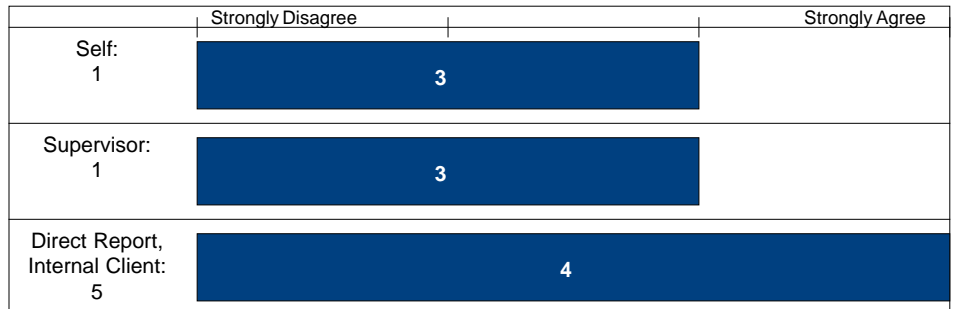
	Strongly Disagree		Strongly Agree
Self: 1	3.07		
Supervisor: 1	3.23		
Direct Report, Internal Client: 5	3.73		

# Excel View Question Scores

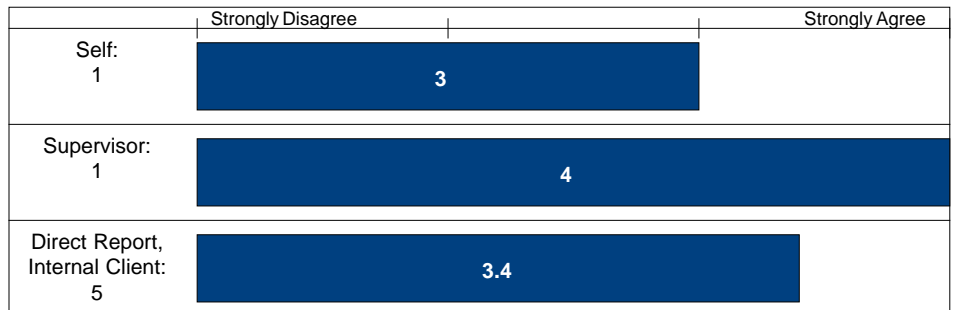
Jane Doe

Date: 09/06/2006

7. Displays a commitment to the development of his/her employees.



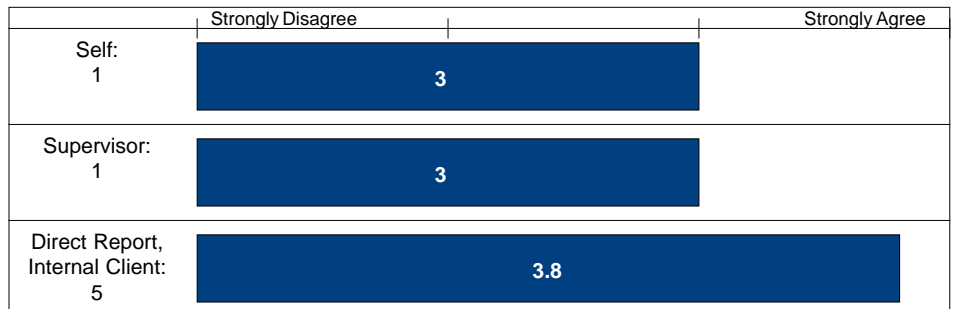
8. Solicits feedback from those involved before jumping to conclusions.



9. Seeks to fully understand a situation before jumping to conclusions.



10. Approaches problems as positive learning opportunities for growth and development.



# Excel View Question Scores

Jane Doe

Date: 09/06/2006

11. Congratulates co-workers on their successes regularly.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

12. Provides regular updates on progress.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

13. Assists others in problem solving, rather than just telling them how to solve the problem.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.8		

14. As a manager, provides supportive performance feedback.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

15. Establishes environment that encourages employees to take ownership of their jobs.

	Strongly Disagree		Strongly Agree
Self: 1	4		
Supervisor: 1	3		
Direct Report, Internal Client: 5	4		

16. Provides clear instruction and invites questions and responds with respect.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

17. Takes a collaborative approach to problem solving.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

18. Encourages two-way communication about expectations and responsibilities.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

19. Consults with direct reports to help determine their developmental goals.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.6		

## Communication

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.65		

20. Presents opinions in a way that makes it safe for others to disagree.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

21. When something goes wrong, asks clarifying questions instead of jumping to conclusions and assuming the worst.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

22. Asks questions to be sure instructions are understood and invites feedback.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

23. Helps people feel comfortable sharing their opinions.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

24. Invites employees to raise issues and contribute to the solution.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

25. Encourages two-way communication.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	4		

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

26. Asks questions to clarify and understand.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

## Trust

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3.42		
Direct Report, Internal Client: 5	3.75		

27. I trust what he/she tells me to be accurate and true.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.8		

28. This person makes me feel appreciated for my contribution.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

29. Gives each person's ideas and suggestions fair consideration based on their own merit.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	4		

30. I feel this person treats others with respect.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.8		

31. I can express my honest opinions to this manager without fear of reprisal.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 0			
Direct Report, Internal Client: 5	3.6		

32. I trust this person to represent my interests, even if I am not present.

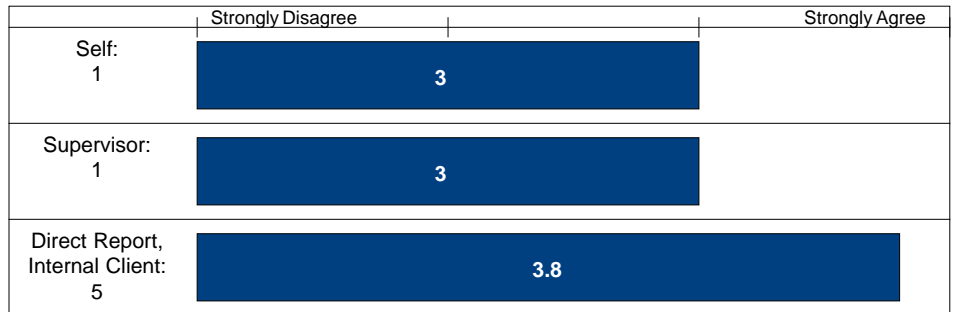
	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.6		

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

33. Doesn't withhold critical information from others.



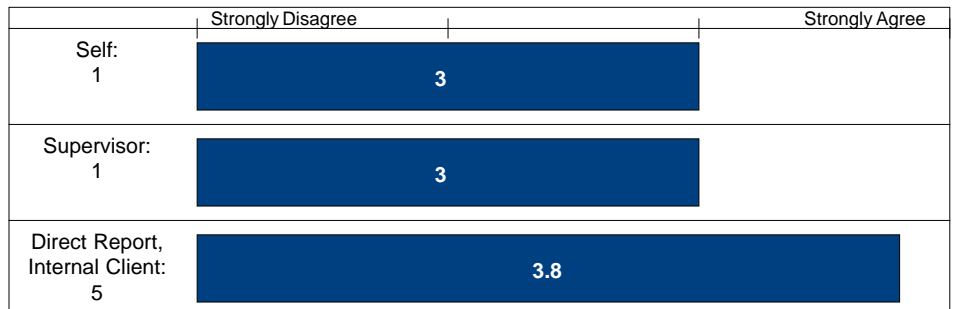
34. He/She follows through on promises and commitments.



## Listening Skills



35. Does not make others feel that it is not worth having a different opinion.



# Excel View Question Scores

Jane Doe

Date: 09/06/2006

36. Listens carefully to understand the underlying concerns and needs of others.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.6		

37. Models patience when others are speaking.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.4		

38. Listens carefully to my suggestions and gives me honest, timely responses.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.6		

39. Makes me feel my contribution is important by listening to my viewpoint even when we disagree.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.8		

# Excel View Question Scores

Jane Doe

Date: 09/06/2006

40. Will give me undivided attention when I am discussing something.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	4		
Direct Report, Internal Client: 5	3.8		

41. Makes people feel safe speaking up and sharing dissenting opinions.

	Strongly Disagree		Strongly Agree
Self: 1	3		
Supervisor: 1	3		
Direct Report, Internal Client: 5	3.6		

# Excel View Open Comment Questions

Jane Doe

Date: 09/06/2006

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## 1. Comment on this person's overall contributions.

Jane provides support & guidance to our team.

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She has contributed greatly to this team in order for us to have the reputation we have currently-great service and dependable. We are glad that we are able to have a supervisor that we can openly share our thoughts, bring up any issues, and solve problems and work as a team. She creates unity and consistency and helps us be able to be efficient in what we do and she also encourages growth and personal improvement.

We feel that she understands us because of her knowledge in the industry and that she works together with us rather than us under management.

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Jane will log on the call centre to take calls for the advisors if we are busy, on vacation, or sick. She gives out positive energy everyday which reflects on our performance.

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Examines situations thoroughly and often provides suggestions and alternatives to process

- 
- Leads team members to understand customer's needs.
  - Assist team members to handle various inquiries & different type of customers
  - Promote & facilitate cross-training to strengthen team's knowledge
  - Assist team members to understand each other's job
  - Coach team members to take course to expand personal knowledge
  - Empower team members to take necessary steps to get things done
  - Recommend manager to promote team member based on individual performance

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Contributes department information of situations arise to help better service customers. Informs us of new changes coming that would impact us in our job duties. Opens up for discussion and wants participation in sharing our thoughts and ideas within the department to achieve better relationship between co-workers and servicing each other as well to improve service for our customers.

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## 2. What are this person's greatest strengths?

Jane has a great deal of knowledge regarding the organization & is a great source for obtaining information.

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Will listen and care for our personal growth in improving ourselves. A good teacher in terms of teaching us how to cope with the daily tasks we handle, how to be more independent. Very helpful and understanding, promotes cooperative teamwork. A strong support for the team to benefit the company.

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Jane is just a great leader, good listener and is always supporting anything we do. She is extremely knowledgeable and has taught myself and the rest of the team processes in insurance. She has a great attitude and I enjoy coming to work.

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Knowledge of the industry, compassion for her staff

- 
- Keep team informed constantly
  - Share industrial knowledge with team (on-going)
  - Support & trust team member
  - Charisma
  - Integrity
  - Empowering team
  - Self-confidence
  - Intelligence

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This person's greatest strength is she is focus on her team to help by listening and offering suggestions to help us manage our duties more effectively by providing us with additional training needs. She is approachable, friendly, fun and caring person. She puts her team's needs first to work out solutions promptly as best as she can while meeting the standard of the department workflow. Seeing this demonstrated in her helps the team work hard and focus as well to achieve personal goals and well as working on the team's goals. She always encourages us to gain and learn as much as we can in and outside of the workplace.

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## 3. What are this person's main areas for improvement?

Due to limited resources and authority she has, even if she is willing to take action to concerns we have that can improve the team, it cannot be accomplished at this time.

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# Excel View Open Comment Questions

Jane Doe

Date: 09/06/2006

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I really can't think of anything.

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Patience with colleagues and lack of other's client service focus.

- 
- Needs more time in communicating with team
  - Needs to be more sociable with the team & other department
  - Needs to delegate more to team
  - Needs to work on Ingratiation & persuasion

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#### **4. In terms of enhancing your own job performance, in what areas would you like this person's coaching to assist you?**

providing feedback on my job performance

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Training in leadership

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Jane already encourages me to take the HR training courses which we do to help in the job performance's. After call evaluations she sit's down and discuss's what I could have done better in the call. I think she does a great job already.. No complaints

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Be able to delegate more responsibilities throughout her team. In order to do this require Jane to encourage and receive buy in from her staff to take on new challenges

- 
- Persuasion
  - Ingratiation

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I would like to have and know hands on the other people job functions in the department to help and have a better understanding to service people in and outside the company.

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