

Management Team Assessment

Every person in the management team can be helped to do better, and it is the task of every team's manager to ensure that the right people are in the right roles, working together effectively.

However, this is no easy task. Whilst you can look at a person's CV and assess their experience, it is much harder to assess their core abilities, skills, culture and attitudes, all of which are so crucial to the success of the team. It can be very hard to understand how to manage the team most effectively.

My advice is usually to keep things simple. In the first instance, beware of using very detailed tools and questionnaires which tend to deliver complex feedback that needs an expert to read them, and/or a sea of unfocussed detail. For example, I have done 360 assessments that provide pages of results, but very little cohesion in the answers that you can practically use.

Notwithstanding this, the best source of feedback for anyone usually *is* their co-workers. I use a straightforward and anonymous web-based system that asks and gives the most clear-cut answers on what does and doesn't work and how to improve. This data, combined with interviews and confidential discussions over the feedback gives one of the very best personal outputs.

The example output below shows the typical summary for each person:

Personal Assessment: Julian Priors

Summary Opinion					
Julian is a very strong business person who needs a wider remit and opportunity, or he will probably leave.					
Key Strengths ex 360	No.	Key Limitations ex 360	No.	Development Support ex 360	No.
1. Strongly numerate	9	1. Can be political	7	1. Needs support in leadership awareness	5
2. Strong business skills	6	2. Still learning the industry	5	2. Board exposure	3
3. Good with people	4	3. Must keep listening	4	3. Understanding the culture	2
4. Professional and balanced	2	4. Learn the business and culture	2	4. Mentoring/ coaching program	2
5. Business development	2				
Key Capabilities and Limitations					
Julian is by a distance the most business-aware member of the team, seeing the bigger picture well beyond that adopted by most accountants. He has experience of the 'rough-and-tumble' of general management, and can be a useful asset in helping to manage through difficult issues. His lack of engineering expertise keeps him on the sidelines as far as the technical development of the business is concerned. He is a good 'people person' and leader, albeit may have suffered a little from perceptions of being the "MD's man".					
Development, Role and Responsibilities					
Julian is highly developed already, with the key question being: "Use him or lose him". His prospective move onto the Board is an obvious positive development, but we doubt that it will suffice. In order to be satisfied, Julian will need to be stretched beyond the remit of FD. Options to stretch him include:					
1. Leadership and Management. He has managed businesses including all aspects: sales; marketing; operations etc. I recommend that he be given a broader role, as part of the MD's 'core, trusted, senior managers. This could include a range of activities from sales to commercial to 'back-office' functions such as HR, QA or RA.					
2. Industry induction. It is crucial to give Julian deeper exposure to the industry if he is to be brought to a place of becoming a successor to the MD.					

The output above is focused on pulling out the main issues that matter for each person. They will usually receive their full detailed anonymous comments, avoiding tensions in the team, or creation of bad feeling.

The key transformational issue for people is when they are helped to see that similar issues have been brought up by several people. This is so powerful, because any real issues will be repeated, which are then much harder to dismiss (e.g. "my boss *would* say that") than when taken individually.

Team Overview

I like to prepare an overview of the key issues in the team, for example as shown below, to assist their understanding and enable the management structure and approach to be developed and refined for the whole team:

Overview of Personal Assessments

Name	Key strength	Key Limitation	Future Development and Role
Adrian Arlington	Entrepreneurial inventor	Avoids conflict.	Take away the day-to-day people management so that he can focus on the products that will make money.
Brian Bradshaw	Competent deliverer with many ideas	Lacks confidence	Use him as an 'ideas scout' in the development of the product strategy
Colin Coulson	Technically adept sales professional	Jumps too quickly to a idea	Potential to be an outstanding Sales and Marketing Manager, given clarity on strategy.
David Dexter	RA knowledge and attention to detail	Emotional & negative attitudes	David needs mentoring to support him in his worries re his role, so that he can thrive
Edward Eagle	Research expertise and people skills	Has very much her own agenda	Provide help in finding clarity on the product strategy
Francis Fuller	Excellent, respected QA professional	Not a team player	Let her re-engineer QA to make it simpler and more focused on results
Graham Grace	Strong business person	Still learning the business	Expand his role, and create networking opportunities
Henrietta Harrows	Strategic market knowledge	Uncommunicative and at times disengaged	Establish and hold accountable for clear deliverables and a strategy that he believes in
Iona Ingles	Technically competence & respected deliverer	Naïve re business and commercial matters	Widen her role to develop and enable her to show she has the drive to lead people across the business
John Jewson	Technical knowledge & solutions	Not a sales driver	Sales role to be focused on creating technical solutions under the refreshed management structure
Karen Kakambula	External corporate experience & credibility	Needs a clear role	Use her know-how to develop the technology Strategy
Lena Lovejoy	Delivers results	Inexperience in management	Expandi her role, so she can grow further

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