

# **Appendix I**

## **Analysis of Current Management and Leadership Diagnostic Tools**

**Note:** Comments are the assessments of the authors only: they do not represent any formal view of ELWA

These assessments have not been agreed with the authors or copyright holders of particular tools.

## **1. THOMAS INTERNATIONAL – PERSONAL PROFILE ANALYSIS**

Part of a widely-adopted suite of profiles characterised by attractively produced outputs and reasonably quick to complete (approximately 10 minutes). Outputs can be used for selection and succession planning requirements, and offer the opportunity of leading on to further development activities.

Thomas International products are well-established, and have been used by large numbers of organisations throughout the UK and more widely (see [www.thomasinternational.net](http://www.thomasinternational.net)).

Key strengths centre on: ease of completion, speed of completion, good 'face validity'. Weaknesses centre on concerns on the part of many HR practitioners and psychologists that results may be 'superficial'; may **not** provide robust data for leadership and management development planning; equally, the focus on personality issues and not the number of key technical competences (e.g. financial management). There is also limited opportunity to address different **levels** of strengths and needs with, in principle, similar results attainable for very junior and very senior managers.

Costs are required for buying and processing the tool: training and consultancy often recommended; levels of costs depend on the numbers bought at any one time and level of support, but can be quite low (£10 per user indicated)

**Overall, these are tools which might be used at a very early stage in a self-diagnostic process, but lack the robustness to do much more.**

## **2. CHARTERED MANAGEMENT INSTITUTE: – ON-LINE CONTINUING PROFESSIONAL DEVELOPMENT SCHEME ([www.managers.org.uk](http://www.managers.org.uk))**

As its name implies, this CMI tool allows on-line completion, in particular allowing individuals to record their learning and development, and test their knowledge, understanding and ability in specific management skills. There are opportunities for peers to assess individual skills and the tool can lead on to further development activities.

Reasonably time-consuming (up to 2 hours): the tool nevertheless, covers a wide range of topics influencing, managing creativity, assertiveness, business planning, quality assurance, budgeting and managing projects, etc.

Strengths centre on the on-line convenience, the availability of private and confidential results, coverage of a reasonably comprehensive range of competences, and clear signposting to areas of further development.

Weakness include the tool's primary focus on CPD for the Chartered Management Institute rather than offering a specific self-diagnostic tool; and there is, perhaps, an emphasis on hierarchical management structures rather than SME-friendly structures.

**Overall, this tool focuses on cpd for managers who are members of the Chartered Management Institute, rather than offering a high standard of free-standing self-diagnostic capabilities**

### **3. DPG – MANAGERIAL ASSESSMENT OF PROFICIENCY (MAP) TOOL**

A commercially available tool, widely used internationally (DPG have UK rights – see [www.dpgplc.co.uk](http://www.dpgplc.co.uk)) which covers an extensive range of management competences (albeit not following the same format as the new occupational standards for managers).

MAP does represent a 'true' management and leadership self-diagnostic tool: a number of different versions are available (including one capable of completion in well under 1 hour – see separate entry on the 'Functional Test'). Good levels of support are available from trained facilitators, and the tool is increasingly gaining acceptance amongst business development agencies( e.g. Advantage West Midlands).

**Strengths:** A genuine self-diagnostic and management and leadership tool, giving clear recommendations for future development. Significant experience from elsewhere can be drawn on.

**Weaknesses:** Although various versions are available, the main MAP product can take up to 2 days to complete fully, involving in-depth discussions and reviews with trained facilitators. Costs are variable, depending on the numbers purchased and additional financial inducements some support agencies have provided. In practice, MAP also tends to assume reasonably high levels of formal management education, a significant proportion of which may not be relevant to SME owner/ manager needs.

**Overall, this is a 'true' self-diagnostic tool which deserves to be taken seriously by those looking to improve their management and leadership skills, but the time to complete it and some of the detailed emphases on highly technical elements of management skills means it does not meet all of the criteria set out in Table 5.**

### **4. TIME MANAGER INTERNATIONAL (TMI)**

In-company solutions developed by a major training/consultancy organisation (see [www.tmi.co.uk](http://www.tmi.co.uk)), this tool covers key areas of management and leadership skills including customer service, quality, time management, various 'soft skills'.

The tool will typically lead to tailored solutions based around specific business goals, but has been widely adopted and a range of web- and computer-based versions are available to draw on.

Strengths focus on the attractive well-designed materials, clear outputs which focus on development areas (typically directed towards a specific working environment) and a long track record for the tool itself, and TMI as an organisation.

Weaknesses: Although the tool can be customised, it will not normally cover all of the new occupational standards for managers; mediation is normally required, so that the criteria for 'self-diagnostic' design are not technically met. Above all, the tool appears to be targeted mainly at bigger, more structured organisations: it is unclear how easy the tool will be to use in an SME context.

**Overall, this tool is mainly intended to lead into and complement proprietary training programmes. It might be possible to customise it further to meet more of the requirements for an SME-based self-diagnostic tool, but this redesign work would be extensive and costly.**

## **5. DEVELOPMENT PROCESSES GROUP ([www.dpgplc.co.uk](http://www.dpgplc.co.uk)): FUNCTIONAL TEST**

The Functional Test should really be seen as part of the overall MAP suite of applications: the Functional Test links into MAP, has good face validity and its modular design means that what are virtually free-standing tools of varying lengths can be developed to meet individual needs for assessment in only a small group of targeted areas.

Because the functional test allows for a good deal of customisation it might be possible for the tool to be re-designed to meet the majority of criteria outlined in figure 5.

Strengths: good face validity, modular design allows homing in on areas of particular interest; immediate link into much more detailed assessment tools (via MAP).

Weaknesses: as with MAP, current designs tend to assume high levels of immediate knowledge of technical management issues.

**Overall, this tool does represent a realistic, fairly brief self-diagnostic tool. Some concerns about current language and concepts need to be raised, but the key issue is probably the extent to which existing designs could be re-worked to meet the sort of criteria outlined earlier in this report.**

## **6. Business Improvement Tool for Entrepreneurs (BITE)**

Developed under the auspices of the now defunct Council for Excellence in Management and Leadership ([www.managementandleadership.org](http://www.managementandleadership.org)), BITE is expected to give information about entrepreneurs' capabilities in relation to decisions, strategies and setting goals; creating personal drive; communicating with others; motivating others; delegating to others; winning business; developing systems and procedures.

BITE has capabilities for being used either as a self-diagnostic tool or with a business mentor or colleague.

Despite ambitious targets, it seems that BITE has not been a success. Central to some of the concerns identified have simply been the wording adopted; "Is your get up and go still there or has it nearly got up and gone – just how motivated have you felt in the last year...".

Although good results were claimed during the piloting phase, it seems that these typically depended on the skills of facilitators, with most evidence pointing to BITE **not** being effective when used as a self-diagnostic tool.

**Overall, not likely to offer the characteristics recommended by this project**

## **7. "The Entrepreneur Test": Available from [www.liraz.com/webquiz](http://www.liraz.com/webquiz)**

Typical of a number of self-completion questionnaires available from internet sources, The Entrepreneur Test is quick to complete, highly automated and impersonal, and is, in effect, used as a selling point for further training materials and consultancy support.

**Overall, this tool is attractive, quick to complete and free: it does not, however, offer an independent range of development activities, and could well lack validity and reliability.**

## **8. Hay Group; Managerial Competency Questionnaire; Leadership Competency Inventory**

Well-developed and marketed tools with clear self-scoring (and to some extent self-diagnostic) capabilities, although 360 degree options are available too. Typical completion times are around 30-60 minutes. Main targets do seem to be larger organisations; competence frameworks used are non-standard, and links to specific development activities limited.

Costs (£60 for 10 questionnaires) relatively modest. See [www.haygroup.co.uk](http://www.haygroup.co.uk).

**Overall, this tool does not link with new occupational standards for managers, nor have a good alignment with specific sme needs, does not point effectively to practical follow-on activities.**

## **9. Index 360 ([www.index360.com](http://www.index360.com))**

Attractively produced paper- and ICT-based tool which – as its name implies – gathers feedback data from members of management teams.

Benchmarking against comparable organisations possible; tracking progress over time straightforward.

The tool does not focus on individual management/ leadership issues directly, however, and seems really directed towards big organisations.

**Overall, this tool does not meet the main requirements set out in this report, although quick, easy and attractive to use.**

## **10. 16 PF**

Established as a highly regarded and rigorous psychometric instrument over many years, 16PF is used by many Business Schools and other management/ leadership developers to gather information about individuals' personality characteristics, preferred modes of working, assertiveness and other characteristics.

16PF takes about 40 minutes, but needs to administered, scored and fed-back by someone with appropriate training and qualifications – e.g. an occupational psychologist. Published in the UK by Oxford Psychologists Press ([www.opp.co.uk](http://www.opp.co.uk)).

16PF covers only a small proportion of the new occupational standards for managers, and tends to lead to reflection and discussions on areas like personal style and impact - linking only to a limited degree with specific management development activities without careful mentoring or tutor support.

**Overall, despite its important role in many 'advanced' management and leadership development programmes this tool does not meet the main requirements set out in this report.**

## **11. Belbin Team Roles**

Popular and widely adopted technique for identifying how people will perform in teams, based around preferred styles of working with others. Extensively used within management and leadership development programmes; fairly quick to complete (15 minutes) with ICT-based options (via 'Interplace' – see [www.belbin.com](http://www.belbin.com)) giving rapid, attractive summaries pointing to a number of management and leadership issues.

Self-diagnosis is possible (although pointers towards specific development actions limited); not closely aligned with management competences.

**Overall, despite considerable popularity and widespread application, Belbin's Team Roles seem best focused on supporting development programmes, not initial self-diagnostic exercises like those proposed in this report.**

## **12. Business Link York/ North Yorkshire**

Freely available through the Business Link website ([www.here4business.co.uk](http://www.here4business.co.uk)), the tool 'How Good are your Management Skills' clearly does meet requirements for a fairly quick and simple self-diagnostic tool. The tool has good interactive characteristics (with, e.g. 'guidelines' for each question posed) and is well integrated with the support Business Link York and North Yorkshire can offer or signpost. The questions posed might, however, be seen as having a 'circular' style: e.g. respondents are asked: 'Do you ensure that products and services meet quality requirements<sup>1</sup>?' with responses sought on a 5-point scale. 'Key considerations' include: 'Do you review your quality systems ... Do you train staff in quality procedures?' etc. If scores against particular questions are low, opportunities for using BL services to improve quality performance are readily identifiable. It might be argued, though, that rather than offering new insights, the tool simply asks respondents to point to areas they already know they need to attend to.

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<sup>1</sup> Question 3.

Overall, the tool shows good, accessible design and links into other sources of support effectively. May be seen as lacking depth and rigour, however, merely seeking confirmation of what individuals already perceive to be development areas – hence adding limited value.

### **13. Management and Leadership Network (MLN)**

An extensive website ([www.mln.org.uk](http://www.mln.org.uk)) gives links to a number of 'eternal' tools (e.g. BITE) and also offers several mln-specific instruments. The most relevant for this project is probably the interactive tool 'Creating a Personal Development Plan for Managers'. This encourages a process of personal reflection – starting with 'What is the future for my business?' and leads up to structured action planning in areas ranging from 'What are your key business objectives for the next 12 months?' to 'What development actions are you going to achieve in the next 12 months?'. Useful interactive links to summaries of good practice are included.

Overall, the tool shows good, accessible design and links into other sources of information effectively. Limited structured diagnosis, however – tends to focus on processes of reflection and personal review. Limited formal attention to identifying management and leadership skills strengths/ weaknesses.

### **14. The Learning Business (TLB)**

Based in North Wales, The Learning Business (see [www.thelearningbusiness.co.uk](http://www.thelearningbusiness.co.uk)) offers a range of training, consultancy and business support services. A number of diagnostic tools are provided – in the main, however, being designed to identify which of TLB's services are likely to be most appropriate for an individual/ organisation. A variety of development options – including opportunities for joining in with other business/ organisations, sharing ideas interactively, etc. – is included.

Overall, more a structured introduction to specific 'packages' rather than the generic self-diagnostic tool which this project would require. Links to support/ additional information seem to be effective, however.

### **15. Investors in People Leadership and Management Module (see [www.iipuk.co.uk](http://www.iipuk.co.uk))**

Because of its links to liP more generally, the module does focus attention on leadership and management in an important, high-profile way. Assessment is required from a trained practitioner, however, and there is currently no self-diagnostic element.