
# FACILITATOR'S GUIDE


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# Facilitator's Guide Table of Contents

# About This Guide

*"Reality is merely an illusion, albeit a very persistent one."*

*Albert Einstein*

This guide is an introduction to using **PeopleIndex**. It describes the history and development of this self-assessment emotional intelligence instrument as well as important information about the interpretation of the comprehensive summary feedback report. This guide is intended for coaches, consultants and qualified users of **PeopleIndex**.

## WHAT THIS GUIDE CONTAINS

The guide is divided into five sections. Section I overview of the "COACH" model of giving feedback. Section II provides an overview of emotional intelligence. Section III provides a background and history of the development of **PeopleIndex.** Section IV summarizes how to interpret the **PeopleIndex** feedback report.

Finally, section V provides suggestions for giving feedback with this instrument. We strongly recommend that you read each of these sections thoroughly to obtain maximum results. The Appendix Sections of the guide provides references and a sample **PeopleIndex** feedback report.

Section 1

# Introduction to PeopleIndex

*"Sometimes I think the surest sign that intelligent life exists elsewhere in the universe is that none of it has tried to contact us."*

*Bill Watterson*

**PeopleIndex** was developed to facilitate increased understanding of social, interpersonal, and communication strengths and development areas as part of a self-assessment process. **PeopleIndex** is ideal for use in executive coaching, management development, supervisory training, employee development programs, career development, and succession planning interventions. It can be used either alone, or in conjunction, with other assessment tools and methods (e.g., multi-rater or 360 degree feedback).

## ISSUES OVER THE VALIDITY OF SELF-ASSESSMENTS

PeopleIndex is a self-assessment instrument. But how accurate are self-reports? What role does social desirability, impression management, and self-deception play in the validity of self-reports?

In general, current research suggests that self-ratings of skills and abilities appear to be relatively poor predictors of occupational success and performance. However, both peer and supervisory ratings of skills and potential appear to be at least as predictive of future success or performance as typical personnel selection methods and approaches including assessment centers, work-samples, simulations, and cognitive ability tests (Schmidt & Hunter, 1998).

Furthermore, recent findings suggest that self-ratings of skills and performance are generally more inflated than are those of others (e.g., Nowack, 1997). As a result, self-ratings tend to be weakly associated with evaluations and appraisals from others, and this appears to be most pronounced for professional, supervisory, and managerial positions (Harris & Schaubroeck, 1988). These findings appear have strong implications for human resources practitioners using 360º assessment inventories in their

pre-employment selection and promotion efforts. Despite these potential limitations, self-assessments (e.g., personality inventories) are commonly used in human resource systems and still have modest predictive validity with performance and satisfaction in recent meta-analytic studies. In general, self-reported conscientiousness and emotional stability have been show to be nearly universal predictors for job performance across diverse job families and industries.

Other "Big Five" personality factors have been found to be contingent predictors with extraversion being most highly associated with sales and managerial positions, agreeableness with customer service roles and openness to experience associated with tasks and assignments requiring artistic and creative skills and abilities (Hogan & Kaiser, 2005). A recent meta-analysis of 69 independent studies explored the predictive validity of emotional intelligence with diverse job performance outcomes (Van Rooy & Viswesvaran, 2004). Results suggested diverse measures of self-assessment measures of emotional intelligence correlated .23 with job performance ($k$=19, $N$=4158) and .22 with general mental ability.

**Table 1**
Mean Validities of Typical Assessment Methods [1]

| **Selection Method** | **Validity** [2] |
|---|---|
| Work Sample Tests | .33 to .54 |
| Cognitive Ability/Intelligence | .27 to .51 |
| Interviews (structured) | .41 to .51 |
| Assessment Centers | .41 to .50 |
| Peer Ratings | .41 to .49 |
| Job Knowledge Tests | .41 to .48 |
| Job Tryout Procedures | .37 to .44 |
| Interviews (unstructured) | .10 to .38 |
| Biographical Data | .24 to .35 |
| Personality (Conscientiousness) | .15 to .31 |
| Reference Checks | .14 to .26 |
| Education (years) | .00 to .10 |
| Interests | .00 to .10 |
| Age | -.01 to .00 |

[1]Meta-Analytic Correlations between Selection Methods and Job Performance (Judge, Colbert, & Illies, 2004; Roth, Bobko, & McFarland, 2005; Schmidt & Hunter, 1998)

[2]Validity coefficients (*rho*) include corrections for sampling error and unreliability.

Particularly for some respondents with poor self-insight, overly optimistic and unrealistic appraisals of one's self may have important negative repercussions for professional growth and development within an organization. For example, employees might fail to perceive or accurately interpret negative feedback from internal and external customers leading to behaviors that are largely dysfunctional or resulting in "derailment" within the organization. Similarly, employees with poor self-insight might tend to ignore discrepant, yet accurate, feedback from others and be unwilling to make specific behavioral changes in critical skills and behaviors.

In summary, current research suggests that there is a tendency for some employees to rate their skills and abilities higher than others. This "leniency effect" should be recognized and expected, particularly in employees who possess poor self-insight and self-awareness. Getting employees to acknowledge and accept critical feedback from others in a non-defensive manner is a necessary first step for commitment to change and continued professional development.

## RELIABILITY AND VALIDITY SELF- ASSESSMENT INVENTORIES

Whether you decide to develop your own or purchase an off-the-shelf assessment inventory, they should have all the important psychometric properties of well established and accepted paper-and-pencil instruments including reliability and validity. Although there are many different types of reliability and validity, practitioners should attempt to minimally determine and establish the following:

- Reliability
    - Test re-test (consistency over time)

      Scale (internal consistency of the scales being measured)

- Validity
    - Face (respondent's reaction and acceptance of the instrument)
    - Content (job-relatedness of the questions being asked and scales that are measured)
    - Criterion-related (association between the scales and diverse performance criterion)

Practitioners who choose to develop their own assessment tools should utilize a small group of representative employees to determine whether the scales that compose the instrument have adequate reliability and validity. Outside vendors marketing these instruments should have information available about the development, reliability, and validity in the form of validity manuals and published research studies for you to review.

In summary, practitioners must insure that the assessment inventory being utilized has adequate reliability and validity. It is important to understand that there are many different types of reliability and validity.

Each tells you something different about the usefulness and strength of the instrument. Don't be misled when someone tells you the instrument has been "validated." Be sure to ask what type of validity the individual is referring to and how they arrived at this conclusion.

Section 2

# Using Feedback for Development: The "COACH Model"

***"A word to the wise ain't necessary. It's the stupid ones who need the advice."***

***Bill Cosby***

You just got a call from the Vice President of Human Resources. She is asking you to work with a member of senior management who reportedly has been experiencing some recent performance problems. This person has been a long-tenured employee who has progressed up the managerial ladder after having spent many years in a technical specialist career track. He is from the "old school," and typically uses a "command and control" approach to leadership and employee motivation. This style is becoming somewhat out of step with the new trends in your organization that emphasize customer service, collaborative teamwork, and participative approaches to problem-solving and decision making.

You have been asked to design and implement an individualized coaching process to help the individual better understand how he is being perceived, and what impact his leadership and communication style has on others. It is hoped that this process will culminate in a specific executive development plan targeting critical competencies required for success in the current organizational culture.

You wonder what to do first. You would like to respond to this request and provide assistance in a manner that will benefit the manager as well as the people reporting to him and others who may feel the effects of his management style. On the other hand, this is a real challenge, and you realize you need to consider the pitfalls, too. If you can structure and deliver an appropriate intervention, and if the manager can rise to the challenge and successfully implement the resulting plan, it could be a "win-win" for all concerned.

It is important to think carefully about how to structure a coaching intervention to maximize its chances of success. When properly designed, individualized coaching can be an effective process to help executives and managers better understand and clarify specific strengths and development areas, and then take action to address those needs. Executive or managerial coaching can be particularly challenging even for the most seasoned training and development professional. When done well, these approaches to coaching can yield dramatically positive results for both the individual and the organization.

Although traditionally used for performance improvement, frequently organizations are incorporating coaching processes in executive and management development, succession planning and career counseling programs. Whatever the context, a coaching process presents specific challenges and issues that must be addressed to ensure success. On the one hand, using a structured and systematic approach to individualized coaching gives focus and maximizes the chances that the intervention will be successful. On the other hand, it is essential that the process retain enough flexibility to address specific individual and organizational needs that may emerge as the process takes place.

This section describes a four-step method, the "COACH" process, which provides a structured approach to individualized executive and management development. It contains recommendations for issues to address before, during and after a coaching intervention. The "COACH" process consists of four specific steps. Each step is designed to provide a "roadmap" for how to address critical issues and questions at that stage in the process. The "COACH" process consists of the following steps:

1. Contract
2. Observe and Assess
3. Constructively challenge
4. Handle Resistance

To start, the coach/consultant, the individual receiving coaching, and possibly other relevant parties make a contract or a set of agreements so that each knows what the objectives are, who is responsible for doing what, and how success will be evaluated. Then, the consultant will observe and

assess the individual to determine their strengths and areas for improvement, which later will form the basis of an action plan. Next, the consultant will constructively challenge the person in a way that is both supportive and compelling so that the individual can understand the issues and be prepared to address them. Finally, the consultant will need to handle resistance that a person is likely to exhibit whenever they are confronted with discrepant information or challenged to make important changes in their behavior.

Below each step in the coaching process is described briefly, along with guidelines that can help a coach/consultant successfully implement it.

## Step 1: Contract

The key to a successful executive and managerial coaching intervention starts with the initial step of the "COACH" process--Contracting. The idea of a contract is similar to the legal term: a set of clear, workable agreements. Careful contracting will facilitate clarity in defining the coaching goals, methods and outcomes. Too many coaching interventions fail or are less than effective simply because there was poor or insufficient contracting.

As with any other consulting intervention, poor contracting up front in an executive or managerial coaching process may end up doing more harm than good. Careful contracting enables people to know what they are getting into, and it can help minimize anxiousness, resistance and anger (which to some extent are inevitable).

To begin the contracting process, the training and development consultant needs to determine who the client is (which is not always as obvious as it may seem), who the other relevant parties are, and what are the major needs and wants of each. (It is important not to neglect one's own needs and wants. After all, the consultant has some ideas as to what in their professional view are the conditions necessary for good outcomes.)

Next, it is the consultant's responsibility to make sure that people understand and agree on the major terms of the contract. When in doubt, DON'T ASSUME ANYTHING! It is better to risk annoying people by stating and restating the obvious than simply to hope people are holding the same assumptions

The consultant's job in this stage is to help people identify the relevant foreseeable issues, and make sure they are adequately discussed and agreed upon. Throughout the process, one may need to work hard to maintain the mutually agreed upon contract. Regardless of the clarity of the contract, people sometimes can remember points differently or try to change them throughout the course of the intervention.

A "fuzzy" contract--one in which people reach vague pseudo-agreements because they do not wish to face up to difficult issues--can spell trouble ahead. If, in the consultant's opinion, the contract is not workable, it is best to turn down the assignment rather than take it on and hope that things will change. Sometimes, political considerations may weigh against negotiating too forcefully, and it may be best to recommend an external consultant if the political climate makes it too difficult to proceed safely.

Any executive and managerial coaching process requires definition and clarity around the following key contracting issues summarized below. It is recommended that the training and development consultant initiating an individual coaching assignment thoroughly define and gain mutual agreement on the following contracting questions:

- Who is the client in the coaching intervention? (Is it the individual to receive coaching? their manager? Human Resources? Other key executives who may have a stake in the outcome?)
- What is the project definition, the parameters, or the scope of the project?
- What are the purposes and intended outcomes of the coaching intervention? (both stated and unstated)
- What involvement, if any, will there be of other individuals in the client system (e.g., the client's manager or Human Resources)?
- Who "owns" the intervention? (Who is accountable for what activities or outcomes?)
- How will the need for the coaching intervention be communicated to the individual?

- Who will receive feedback from the coaching process?
- How will the feedback be delivered, and in what form?
- How will the coaching intervention be monitored and evaluated?
- What follow-up will be built into the process (e.g., subsequent use of an assessment instrument 10 -12 months later)?
- How will the results of this coaching intervention be translated into an individualized development plan?
- How will the data, results and findings of the coaching intervention be used (e.g., integrated into the performance management succession planning system)?

## Step 2: Observe and Assess

Once the majority of issues and concerns of the contracting step has been clarified, the "COACH" process emphasizes the design and implementation of a carefully planned methodology to observe the individual and assess their strengths and development areas. The training and development consultant needs to design a comprehensive approach to observe and assess the critical competencies being targeted in the coaching intervention.

In selecting an approach to observation and assessment, it is important to tailor it the specific needs of the individual and the organization. When possible, it is desirable to employ multiple assessment approaches targeted to critical skills and competencies required for organizational success.

The foundation of a successful coaching intervention begins with clarity around the specific competencies being targeted. The areas most commonly evaluated during executive and managerial interventions include:

1. Communication (e.g., listening, meeting management, high impact presentations)
2. Interpersonal (e.g., Negotiation, Conflict management)

3. Task Management (e.g., delegation, team development, performance management)

4. Problem--Solving/Decision Making (e.g., strategic and long-range planning, judgment); and

5. Intrapersonal (e.g., stress resistance, managerial career orientation). A job profile analysis can assist the training and development consultant to define the specific competencies to be targeted.

Ideally, the job profile analysis should include a review of the departmental organizational strategic plan to identify major competencies required for future performance as well as a traditional review of competencies needed to perform successfully in the person's current job.

When selecting assessment tools and methods, it is best first to decide on the relevant competencies, and then select the tools that are most appropriate for measuring them. A wide variety of assessment instruments and tools are available to measure: 1) critical skills and knowledge; 2) personality/style; and 3) career orientation, interests and values. These can include paper-and-pencil instruments, behavioral exercises, role-plays, simulations, leaderless group exercises, or an integrated approach that combines a number of these approaches. Training and development consultants should be careful not to fall into the trap of using only those techniques with which they are familiar and comfortable.

Knowledge might be assessed appropriately using situational interviews, simulations and work sample tests specifically designed for the coaching intervention. Skills are best assessed using either multi-rater 360° feedback processes (instruments and/or interviews) or through assessment center methods such as an in-basket simulation and other work sample tests.

Feedback about personality and style (leadership, communication and interpersonal) likewise can be ascertained through the use of multi-rater 360° feedback processes. Also, a wide variety of off-the-shelf instruments can be used for gaining insight about personality and style. Diverse "style" measures are used often for teambuilding purposes. These popular organizational "marriage counseling" tools can be quite helpful to executives and managers for becoming more aware of how others view their leadership and interpersonal style and the impact they have on direct

reports, team members and customers. Also, the newer generation 5-factor personality inventories might be considered to provide a comprehensive overview of the individual and their tendencies to approach organizational and interpersonal challenges.

It also may be helpful to gather information about the career orientation, interests, and values of the individual. This can be accomplished through the use of a structured interview process and/or career assessment instruments.

Sometimes in executive and managerial coaching interventions, it becomes necessary to make a referral to outside resources (e.g., therapists, alcohol and substance recovery programs, family counselors) for help with personal or lifestyle issues that could be interfering with job performance. A computerized health risk appraisal and complete medical checkup may also be desirable or necessary.

Careful consideration of the methods and approaches used to observe and assess the individual during a coaching process is essential to the success of an intervention. The following issues and questions should be addressed when selecting assessment methods:

- What critical dimensions/competencies will be targeted?
- What specific assessment methods/instruments will be used to measure these key competencies?
- Who will provide data on the relevant competencies being measured (e.g., peers, direct reports, customers, the person's manager, etc.)?
- How can one set a context so that data can be collected in a manner that will yield the most accurate results?
- Who will provide the feedback, and how will it be delivered?
- To what extent will confidentiality be maintained throughout the feedback process, and how can this be ensured?

- How will the results be assembled and summarized to provide maximum clarity about the person's strengths and development areas?

## Step 3: Constructively Challenge

The third step in the "COACH" process involves constructively challenging the person with the information collected in the observation and assessment phase of the intervention. The data need to be summarized and delivered to the person in way that helps them understand and accept it without becoming overly or unnecessarily defensive. Otherwise, the best contracting efforts and measurement methods may be of little value in assisting the person to improve targeted performance behaviors.

In this feedback step, the consultant must provide the information in a succinct and behaviorally oriented manner using both oral and written feedback. If separate computerized feedback reports are given, it is advisable to prepare a final summary assessment report to focus developmental efforts. The consultant needs to maintain confidentiality and provide non-evaluative observations and comments about specific competencies being targeted in the coaching process. It is important to be careful not to label or make predictions about future success or failure based upon the assessment results.

One important issue to consider is whether the person has a realistic impression of their strengths and development areas. It is very common to discover that many executives and managers typically have unrealistic views of their skill level (e.g., "over-estimators" or "under-estimators").

Over-estimators typically rate themselves higher than others rate them, and often become defensive when receiving feedback. The training and development consultant must actively listen, focus feedback on specific behavior and avoid describing personality or attitude traits. The art is to share information in a way that provides specific examples, yet does not compromise confidentiality. That way, the person can get a good handle on what specifically they are doing that produces negative reactions in others.

For those who underestimate their strengths, it is important to expect that they may be lacking in self-esteem or confidence. The training and

development consultant should provide as many examples and critical incidents of successful interactions, high performance outcomes and project successes to enable the person to modify their self-image in a more accurate, positive direction. Often, "under-estimators" are more fearful of failure than they are of success on the job. As a result, they may tend to be a perfectionist and self-critical, and thus have a deflated view of their skills.

The following issues and questions should be addressed during this step of the coaching process:

- How will the feedback/data best be presented to facilitate acceptance and understanding?
- How does one balance confrontation and support?
- If feedback is to be shared with the person's manager or others, how can one do it in a manner that allows the individual to retain dignity and an appropriate degree of control?
- What is the best balance of quantitative and qualitative data to be presented?
- What special considerations should be given to delivering feedback to people whose self-evaluation is either in agreement with or discrepant from feedback from others?
- How can feedback be structured and delivered most constructively to an "over-estimator?"
- How can feedback be structured and delivered most constructively to an "under-estimator?"
- How should the feedback be paced so the person can assimilate the array of issues, yet be able to focus on a few that are of greatest importance?

## Step 4: Handle Resistance

In almost all executive and managerial coaching processes, some amount of resistance to the process or to specific feedback will be expressed. The training and development consultant should be prepared to experience and effectively handle the person's anger, frustration, and direct or indirect challenges.

People who lack self-insight about their areas for improvement (e.g., over-estimators) typically display the most resistance and denial. The way one identifies and handles resistance is critical for the coaching process to be effective. The training and development consultant must work hard to understand the person's feelings, especially their fears and anxieties that they may not feel comfortable acknowledging. This requires a high degree of support, active listening and probing to uncover the source of the resistance to the process or to specific feedback from others. It is important to recognize that when people are resistant, they are unlikely to accept the feedback as valid--let alone become committed to making behavioral changes.

For many consultants, handling resistance can be especially challenging. It is natural to feel that after one's hard work in the earlier stages, people should appreciate your efforts and willingly go along with your recommendations and do their part. Because of this, consultants sometimes may miss subtle signs of resistance. With experience, however, it is possible to develop a thick skin and learn not to take resistance personally. If the consultant truly is comfortable with someone expressing their resistance, it becomes easier to help them identify and deal with their feelings. This paves the way for the person to do the hard work of addressing behavioral change.

The following issues and questions should be addressed during this last step of the coaching process:

- How can resistance be spotted--whether overt or subtle.
- How will defensiveness, denial or anger be handled effectively?
- How will anxiety and/or low self-esteem be handled effectively?

- How will the coaching process be translated into a specific action plan that truly addresses the person's issues (rather than going through the motions so the person can appear to comply)?

- How will progress against the individual development plan be monitored and evaluated?

- What process will be used to follow-up with the person?

- What type of resistance is the consultant most vulnerable to, and how can one avoid getting "hooked?"

- How can the consultant distinguish between resistance that is "just" resistance versus valid criticism of the process or the feedback?

Executive and managerial coaching assignments can be among the most challenging and high impact interventions. They truly can make a difference to the individual receiving coaching, to those who work with them, and ultimately to effectiveness of the unit or the organization. The "COACH" process of contracting, observing & assessing, constructively challenging and handling resistance can be used to walk through the key steps required to avoid typical problems encountered in most coaching interventions.

To become proficient in the coaching process, it is helpful to follow carefully each of the steps in the "COACH" process and pay attention to the issues raised throughout. But this may not be enough. It also is important to seek and be receptive to feedback about one's own role as a coach. After all, the essence of coaching is helping others deal with feedback. And, who are we to preach that feedback applies only to others and not ourselves?

Section 3

# An Introduction to Emotional Intelligence

## WHAT IS INTELLIGENCE?

***"Only two things are infinite, the universe and human stupidity, and I'm not sure about the former."***

***Albert Einstein***

We all know people who are "smart" but don't seem to ever reach their potential in school, work or social relationships. Are the following people intelligent?

- The cardiologist who smokes?
- The Nobel Prize winner whose marriage and personal life are in ruins?
- The corporate executive who has consistently worked his/her way to the top but experiences a heart attack due to poor lifestyle habits?
- The brilliant music composer who handled his interpersonal relationships and money so poorly he struggled financially his entire career (incidentally, his name was Mozart)?

The debate over intelligence and intelligence testing focuses on the question of whether it is useful or meaningful to evaluate people according to a single major dimension of cognitive ability. Is there indeed a general mental ability we commonly call "intelligence," and is it important in the practical affairs of life? The answer, based on decades of intelligence research, is an unequivocal yes.

No matter their form or content, assessment of mental skills invariably point to the existence of a global factor (often referred to as "g") that seems to affect all aspects of cognition. And this "g" factor seems to have considerable influence on a person's life. On one hand, there is an extensive body of evidence showing that scores on cognitive ability tests predict a wide array of criteria, ranging from performance in school and on the job to mastery of everyday tasks that involve information processing (Murphy, Cronin & Tam, 2003). On the other hand, mean scores on cognitive ability tests differ across racial and ethnic groups and the use of these tests to make decisions about individuals can have substantial adverse impact on specific members of these groups.

Hunter, Schmidt, and their colleagues (1998) have argued that better estimates of the true relation between cognitive ability test performance and job performance are obtained when the validity coefficients are corrected for (a) unreliability in test scores and criterion measures and (b) restriction of range caused by the fact that only high scorers are hired. Employing these corrections raises the average validity coefficient to the level of about .5 (Hunter and Hunter, 1984; Schmidt and Hunter, 1998). Of course, this validity coefficient represents a hypothetical level, not one that is usually obtained in practice. But even if one adopts this optimistic hypothetical figure of .50, IQ test scores account for only about 25% of the variance in job performance. Researchers have therefore begun to explore new constructs in search of measures to supplement existing cognitive ability tests.

## History of Intelligence Testing

Alfred Binet is often cited as the man who developed the first "intelligence test" in the form as we know them today. He is commonly known as the "father" of IQ testing. In 1904, Binet was commissioned by the French Ministry of Public Instruction to develop techniques for identifying school children whose lack of success in normal classrooms suggested the need for some form of special education. In 1905 he created the Binet-Simon scale (with Theodore Simon) the first intelligence test. This IQ test consisted of a series of 30 short tasks related to everyday problems of life (e.g. recalling the number of digits a person can recall after being shown a long list, word definition, etc.) and were arranged so as to be of increasing difficulty. In 1908 the test was revised and then again in 1911. The test results were significantly correlated with diverse school outcome measures (e.g. results

of school examinations, assessments of teachers) in subsequent research generating a model for future testing.

Lewis Terman of Stanford University decided to use Binet's test. He discovered that the Paris-developed age norms didn't work well for United States school children. So he revised the test and it became the Stanford-Binet revision in 1916. In this revision the intelligence quotient (IQ) score was first used to quantify intellectual functioning to allow comparison among individuals. To arrive at an IQ score, Terman expressed the relation between an individual's mental age and chronological age.

At the beginning of World War I, the US army was challenged to come up with a systematic way of assessing recruits to match them with critical tasks and assignments. The Stanford-Binet was lengthy and required trained administrators resulting in the search for an alternative. Robert Yerkes, a psychologist and army major, assembled a staff of 40 psychologists (including Terman) to develop an Army intelligence test. This resulted in the Army Alpha and Army Beta tests (the Beta was a version of the Alpha specifically for use with non-English-speaking subjects). Despite criticism of these tests, the approach used by Yerkes helped to shape the next generation of intelligence measures.

In 1927 Charles Spearman analyzed the associations among experimental intelligence tests available at the time using "factor analysis" as a statistical tool. Based on his research he proposed two very distinct types of intelligences: 1) General Ability (g) which was required for performance of mental tests of all kinds; and 2) Special Abilities: which were required for performance on just one kind of mental test (e.g., scores on a spatial comprehension test are largely determined by one's level of general intelligence but they are also affected by one's specific ability to visualize shapes and patterns). However, Spearman believed and argued throughout his career about the importance and influence of "general" intelligence in school, work and life success.

In 1939, psychologist David Wechsler felt that the Binet scales were too verbally focused for use with adults, so he designed a new intelligence assessment with a series of mini tests to measure both verbal and non-verbal abilities based largely on the US Army Alpha test . Wechsler produced the Wechsler Intelligence Scale for Children (WISC), which competed with the Stanford-Binet test and in 1955 he developed the Wechsler Adult Intelligence Scale (WAIS). These measures continue to be used by school and industrial psychologists even today.

University of Chicago psychologist L. L. Thurstone accepted Spearman's hypothesis of a general factor but he disputed its importance. He argued that "g" is in fact a second order factor-- one which arises only because the primary or 'first-order' factors are related to one another. Thurstone identified 7 "primary mental abilities" which he judged to be more important. These included:

1. Verbal Comprehension: vocabulary, reading, comprehension, verbal analogies, etc.

2. Word fluency: the ability to quickly generate and manipulate a large number of words with specific characteristics, as in anagrams or rhyming tests

3. Number: the ability to quickly and accurately carry out mathematical operations

4. Space: spatial visualizations as well as ability to mentally transform spatial figures

5. Associative Memory: rote memory

6. Perceptual Speed: quickness in perceiving visual details, anomalies, similarities, etc.

7. Reasoning: skill in a variety of inductive, deductive, and arithmetic reasoning tasks

Thurstone's tests have largely been abandoned because the hope that they would be able to more accurately predict academic or occupational performance than general intelligence was not consistently supported by subsequent research. However, his main argument and findings are important: that intelligence is better described and measured by considering distinct mental abilities, rather than a single factor g which does not provide specific information about specific intelligences. In fact, this perspective supported the theories of intelligence of J.P. Guildford who refused to acknowledge the existence of any general factor at all. Instead, he proposed that intelligence comprises 180 elementary abilities. Today, the concept of multiple intelligence or multiple facets of intelligence is currently popular led by the work of Howard Gardner and Robert Sternberg.

## General Intelligence *g*

Early in the study of human intelligence, psychologists discovered that all tests of mental ability ranked individuals in about the same way. Although mental tests are often designed to measure specific domains of cognition such verbal fluency, mathematical skill, spatial visualization, memory--people who do well on one kind of test tend to do well on the others, and people who do poorly generally on all. This intercorrelation, suggests that all such tests measure some global element of intellectual ability as well as specific cognitive skills.

In recent decades, psychologists have devoted much effort to isolating that general factor, which is abbreviated *g*, from the other aspects of cognitive ability measured in standardized mental tests.
No single "general factor" has been found in the analysis of personality tests, for example.

Current research and factor analytic methods usually yields at least five personality distinct and independent "factors" (emotional stability, extraversion, conscientiousness, agreeableness and openness to experience), each relating to different aspect of personality. But, a general factor does emerge from analysis of mental ability tests leading most researchers to use *g* as the practical definition of intelligence.

The *g* factor is especially important in just the kind of behaviors that people usually associate with "intelligence" including reasoning, problem solving, abstract thinking, and quick learning. And whereas *g* itself describes mental aptitude rather than accumulated knowledge, a person's store of life experience knowledge tends to correspond with his or her *g* level, probably because that accumulation represents a previous skill in learning, processing and understanding new information.

Other forms of intelligence have been proposed. Among them, multiple intelligence, emotional intelligence and practical intelligence are perhaps the best known. Practical intelligence like "street smarts," for example, seems to consist of the localized knowledge and survival skills developed with experience in everyday settings and activities.

## The Biology of Intelligence

*"There is no such thing as an underestimate of average intelligence"*

*Henry Adams*

Research on the physiology and genetics of intelligence has uncovered important biological correlates. In the past decade, studies have linked several attributes of the brain to intelligence. After taking into account gender and physical stature, brain size (determined by magnetic resonance imaging techniques) is moderately correlated with IQ (correlations are approximately 0.4). These observations have led some researchers to suggest that differences in intelligence result from differences in the speed and efficiency of neural processing.

The existence of biological correlates of intelligence does not necessarily mean that intelligence is entirely limited by genes. Decades of genetics research has shown, however, that people are born with different hereditary potentials ("set points") for intelligence and that these genetic potentials are responsible for much of the variation in mental ability among individuals. Differences in intelligence are both genetic and environmental in origin--just as are all other psychological traits and attitudes, including personality and interests.

Many people still believe that social, psychological and economic differences among families create lasting and marked differences in intelligence. Research has shown that although shared environments do have a modest influence on IQ in childhood, these effects seem to disappear by late adolescence.

The IQs of adopted children, for example, lose all resemblance to those of their adoptive family members and become more like the IQs of the biological parents they have never known or lived with. Such findings suggest that siblings either do not share influential aspects of the rearing environment or do not experience them in the same way.

## Multiple Intelligence: Different Ways of Being Smart

***"There is nobody so irritating as somebody with less intelligence and more sense than we have."***

***Don Herold***

Two prominent psychologists, Howard Gardner from Harvard University and Robert Sternberg from Yale University have both posited that all of us possess multiple forms of intelligence. Each are independent of each other and perhaps more relevant and predictive of specific work and life outcomes. Each of these theories and models of multiple intelligences have been influential in the development of the concept of emotional intelligence.

### *Sternberg's Triarchic Intelligence Model*

Robert Sternberg (1995; 2003) has proposed a model of "successful" intelligence that is useful for developing talent in high ability students and is applicable to teaching all students. His Triarchic Theory of Successful Intelligence can be used for identifying, teaching, and assessing gifted students. His model can help teachers focus on the skills necessary for academic and social success. The Triarchic model suggests that three intellectual abilities are important to academic, work, social and life success:

- Analytical
- Creative
- Practical

Memory analytic abilities are used in learning, comparing, analyzing, evaluating, and judging material. Most traditional standardized intelligence, aptitude, and achievement tests assess these types of skills. This type of intelligence is closest to general intelligence or "g" and measured by standardized cognitive ability tests.

Creative synthetic abilities are used when one produces something new from a synthesis of material or develops a novel interpretation of an

ordinary situation (i.e., being creative and innovative). This could also involve coping in a novel way with various work and social situations.

Practical contextual abilities are those used to confront everyday problems encountered in day-to-day experience. This experience could occur at school, work, or home. Understanding how the world "works" and how to get along in it, whether based on formal or informal knowledge, represents this kind of thinking. This type of intelligence is closest to the concept of "street smartness" that might not come from any specific classroom learning, coaching or training.

## *Gardner's Multiple Intelligence Model*

Howard Gardner's view of intelligence suggests that all people possess at least eight different intelligences that operate in varying degrees depending upon each individual. The seven primary intelligences identified by Gardner include linguistic intelligence, logical-mathematical intelligence, spatial intelligence, bodily-kinesthetic intelligence, musical intelligence, interpersonal intelligence, and intrapersonal intelligence. The eighth, Naturalistic intelligence was not part of Gardner's original framework but was added in 1996 to include those who excel in the realm of natural science. The general characteristics associated with each of these intelligences are described below.

- **Linguistic intelligence** allows individuals to communicate and make sense of the world through language. Writers and poets exemplify this intelligence in its mature form. Students who enjoy playing with rhymes, who pun, who always have a story to tell, who quickly acquire other languages--including sign language--all exhibit linguistic intelligence.

- **Musical intelligence** allows people to create, communicate, and understand meanings made out of sound. While composers and instrumentalists clearly exhibit this intelligence, so do the students who seem particularly attracted by the birds singing outside the classroom window or who constantly tap out intricate rhythms on the desk with their pencils.

- **Logical-mathematical intelligence** enables individuals to use and appreciate abstract relations. Scientists, mathematicians, and philosophers all rely on this type of logical intelligence. The majority of standardized intelligence tests are measuring this type of intelligence. It is no wonder that individual scoring high on these types of test typically do well in academic situations emphasizing abstract relations, logic and mathematical calculations.

- **Spatial intelligence** makes it possible for people to perceive visual or spatial information, to transform this information, and to recreate visual images from memory (e.g., reading a map). Well-developed spatial capacities are needed for the work of architects, sculptors, and engineers. The individuals who turn first to the graphs, charts, and pictures in books, who like to "web" their ideas before writing a paper, and who fill the blank space around their notes with intricate patterns are also using their spatial intelligence. While usually tied to the visual modality, spatial intelligence can also be exercised to a high level by individuals who are visually impaired.

- **Bodily-kinesthetic intelligence** allows individuals to use all or part of the body to create products or solve problems. Athletes, surgeons, dancers, choreographers, and crafts people all use bodily-kinesthetic intelligence.

- **Interpersonal intelligence** enables individuals to recognize and make distinctions about others' feelings and intentions. Teachers, parents, politicians, psychologists and salespeople typically rely on interpersonal intelligence. Adults exhibit this intelligence when they thrive on small-group work, when they notice and react to the moods of their friends and colleagues, and when they convince and influence others to follow their suggestions and ideas.

- **Intrapersonal intelligence** helps individuals to distinguish among their own feelings, to build accurate mental models of themselves, and to draw on these models to make decisions about their lives. Although it is difficult to assess who has this capacity and to what degree, evidence can be sought in individuals' uses of their other intelligences--how well they seem to be capitalizing on their strengths, how cognizant they are of their weaknesses, and how thoughtful they are about the decisions and choices they make.

- **Naturalist intelligence** allows people to distinguish among, classify, and use features of the environment. Farmers, gardeners, botanists, geologists, florists, and archaeologists all exhibit this intelligence, as do students who can name and describe the features of every make of car around them or adults who seem to know every plant in their garden.

A growing research base suggests that both the Sternberg and Gardner models of "intelligence" are associated with diverse measures of both success and failure on the job and in life. Current research is focused on new generation measures that will provide a more holistic assessment of "intelligence" that is predictive for a wide variety of work and life outcomes.

# HISTORY OF EMOTIONAL INTELLIGENCE

The most widely accepted models of emotional intelligences (EI) have been influenced by several prominent scientists and researchers. Conceptual "roots" of the emotional intelligence concepts have been based on the earlier work of psychologists Gardner and Sternberg who emphasized "social intelligence" as one important component to their multiple intelligences theories.

In 1998, Reuven Bar-On developed his concept of EI in the context of personality, health and well-being. He coined the term "EQ" ("emotional quotient") in 1988 to describe his approach to assessing emotional and social competence. He created the BarOn Emotional Quotient Inventory (the EQ-i), which was the first test of emotional intelligence to be published by a psychological test publisher (1997) and reviewed in the *Buros Mental Measurement Yearbook* (1999).

Peter Salovey first presented an overview of the emotional intelligence framework that he and his colleague John Mayer, Ph.D. published in 1990 on the interaction between emotions and reasoning. One definition of EI they propose is "the ability to process emotional information, particularly as it involves the perception, assimilation, understanding, and management of emotion." Since 1990 these academic researchers have developed a comprehensive assessment of emotional intelligence, the Mayer-Salovey-Caruso Emotional Intelligence Test or MSCEIT. Because nearly all of their writing has been done in the academic community, their names and their

actual research findings are not widely known but they have had a tremendous impact on the EI field.

The person most commonly associated with the term emotional intelligence is actually a psychologist and former New York Times writer named Daniel Goleman who wrote a best selling book (*Emotional Intelligence)* synthesizing diverse models and ideas about EI in 1995. Goleman has formulated a popular model of EI in terms of a theory of organizational and job performance and formed a research consortium dedicated to the further study of EI in business and industry as well as writing two additional best selling books on the topic (*Working with Emotional Intelligence* in 1998 and *Primal Leadership – Realizing the Power of Emotional Intelligence* in 2002).

## Models of Emotional Intelligence

### *Salovey and Mayer Model of EI*

Two popular models of emotional intelligence have emerged, one academic and one popular. The academic model is based on the research work of Salovey and Mayer and consists of four branches of mental ability:

- Perceiving and identifying emotions
- Using emotions to facilitate thought
- Understanding emotions
- Managing emotions

In one publication they describe these areas as follows: The first, Emotional Perception, involves such abilities as identifying emotions in faces, music, and stories. The second, Emotional Facilitation of Thought, involves such abilities as relating emotions to other mental sensations such as taste and color (relations that might be employed in artwork), and using emotion in reasoning and problem solving. The third area, Emotional Understanding involves solving emotional problems such as knowing which emotions are similar, or opposites, and what relations they convey. The fourth area, Emotional Management involves understanding the implications of social acts on emotions and the regulation of emotion in self and others.

### *Goleman Model of EI*

In 1998, in his book *Working with Emotional Intelligence*, Daniel Goleman set out a framework of emotional intelligence (EI) that reflects how an individual's potential for mastering the skills of Self-Awareness, Self-Management, Social Awareness, and Relationship Management translates into on-the-job success. This popular conceptual model of EI suggests that there are 20 independent and important competencies associated with work and life success clustered into the four categories above. Additional information about the development of this model of EI can be found at the Emotional Intelligence Consortium website: http://www.eiconsortium.org/research/ei_theory_performance.htm

## RECENT CRITICISMS OF EMOTIONAL INTELLIGENCE

Research is ongoing with emotional intelligence (Nowack, 2006; Mayer, Salovey, & Caruso, 2000; Davies, Stankov, & Roberts, 1998) with promising although as yet mixed results and criticisms. For example, Davies et al. (1998) suggest that, as presently postulated, little remains of emotional intelligence that is unique and psychometrically sound. Current criticisms of both the academic and non-academic models of EI include:

- Confusion about an accepted definition and consistent model of emotional intelligence
- Confusion about the meanings of other closely related concepts such as emotional literacy, emotional health, emotional skill, and emotional competency
- Unsupported claims about the power and predictive ability of emotional intelligence for job performance, career success, health etc.
- Weak measures of the constructs underlying emotional intelligence models

- Overlap of emotional intelligence scales with well established personality constructs (e.g., five factor personality inventory scales)

- Personality research that does not support the supposed malleability of emotional intelligence with the relative fixity of traditional IQ

Current criticisms of the Goleman (1995) and Bar-on (1997) approach to studying emotional intelligence in the workplace suggest that these models might be useful for organizational development and coaching interventions, but they are too broad in scope, and do not appear to markedly differ from traditional personality or competency models. In particular, these models tend to show a great deal of statistical overlap with a substantial number of the Five Factor Personality (FFM) measures (e.g., NEO, Hogan Personality Inventory) unlike the Mayer, Salovey and Caruso Multifactor Emotional Intelligence Scale (MEIS).

Despite these criticisms, it appears that current emotional intelligence research using diverse measures and models has shown some strong and consistent positive associations with a variety of work and life outcomes. Further research is obviously needed to address some of the recent criticisms outlined above.

Section 4

# History & Development of PeopleIndex

**PeopleIndex** is intended for organizational coaching, training and developmental interventions focusing on the enhancement of critical behaviors and competencies associated with both social skills and effective relationship management. The questionnaire used **PeopleIndex** includes the same competencies and behaviors as our validated **Emotional Intelligence View 360** assessment. **PeopleIndex** is conceptually based on the Goleman organizational model of emotional intelligence focusing on four basic concepts including *Self-Awareness, Self-Management, Social Awareness,* and *Relationship Management* (1998b):

| | **Perception** | **Behavior** |
|---|---|---|
| **Self** | **Self- Awareness** | **Self- Management** |
| **Others** | **Social Awareness** | **Relationship Management** |

A set of critical interpersonal, social and communication competencies were derived in three specific areas based upon the EI model above:

1. Self Management
2. Relationship Management
3. Communication

Items were rationally constructed to measure the full range of emotional intelligence competencies based on the Goleman (1998) model. Seventeen scales were derived, each measured by 3 to 5 questions using a Likert 1 to 7 frequency scale. Where possible, items for **PeopleIndex** were also drawn from three already validated multi-rater feedback tools (Nowack, 1997) originally published by Consulting Tools Inc. (now Envisia Learning) including Executive View 360, Manager View 360 and Performance View 360.

An initial version was piloted with a group of 165 executives, managers and professional employees within two organizations. Statistical analyses included item-scale correlations, breakdowns by relevant demographic variables (e.g., education, age, gender), internal consistency reliability, and descriptive (scale means, standard deviations, etc.) were run to investigate the psychometric properties of the instrument. Based upon the results of the pilot testing and statistical analysis, some revision in item content and wording was done resulting in the copyrighted 2003 74-item version.

The **PeopleIndex** measures 17 competencies grouped in the three areas supporting the Goleman EI conceptual model:

| Self Management | Relationship Management | Communication |
|---|---|---|
| ▪ Self-Development | ▪ Building Strategic Relationships | ▪ Listening |
| ▪ Adaptability/Stress Tolerance | ▪ Conflict Management | ▪ Oral Communication |
| ▪ Self-Control | ▪ Leadership/Influence | ▪ Two-Way Feedback |
| ▪ Trustworthiness | ▪ Interpersonal Sensitivity/Empathy | ▪ Oral Presentation |
| ▪ Strategic Problem Solving | ▪ Team/Interpersonal Support | ▪ Written Communication |
| ▪ Achievement Orientation/Drive for Results | ▪ Collaboration | |

## PEOPLEINDEX NORMATIVE SAMPLE

The **PeopleIndex** normative sample was based on over 3,000 professional employees from 20 diverse industries (profit, non-profit and government). The majority was female (63%), highly educated (73.6% had college or advanced degrees) and split between those under 40 (48%) and older (52%). The majority of the normative sample was Caucasian (69.1%) but included 13% Asian, 8.9% Hispanic, and 4.1% African American (others did not identify ethnicity).

## PEOPLEINDEX SCALE CORRELATIONS

Correlations were run for all 17 competencies as well as the three major **PeopleIndex** clusters including Self-Management (SELMGT), Relationship Management (REKMGT) and Communication (COMMUN). The three **PeopleIndex** clusters were highly correlated with each other. Correlations among the 17 **PeopleIndex** ranged from .56 to .86 with significant associations between them.

| | | SELFMGT | RELMGT | COMMUN |
|---|---|---|---|---|
| SELFMGT | Pearson Correlation | 1 | .931(**) | .901(**) |
| | Sig. (2-tailed) | . | .000 | .000 |
| | N | 923 | 771 | 842 |
| RELMGT | Pearson Correlation | .931(**) | 1 | .889(**) |
| | Sig. (2-tailed) | .000 | . | .000 |
| | N | 771 | 901 | 841 |
| COMMUN | Pearson Correlation | .901(**) | .889(**) | 1 |
| | Sig. (2-tailed) | .000 | .000 | . |
| | N | 842 | 841 | 1225 |

** Correlation is significant at the 0.01 level (2-tailed).

## FACTOR ANALYSIS RESULTS

Responses to the 74 questions composing the **PeopleIndex** were factor analyzed (N=734) using principal components factoring with iteration and varimax rotation. A total of 5 unique factors were extracted with Eigenvalues greater than 1.0 accounting for a total of 71% of the variance in this analysis. The first factor was the largest accounting for over 60% of the variance and included all 74 items suggesting. This mega-factor might be considered as a global index of self and relationship management (Global EI factor).

The second factor accounted for 4.17% of the variance and included 10 items focused on self development, self control, achievement orientation, problem solving, completion of tasks and controlling emotions (Self Management).

The third factor accounted for 2.37% of the variance and included 13 items focusing on self control, handling pressure, maintaining poise under stress, controlling emotions, adaptability, self development, and cooperative team behavior (Stress Management/Adaptability).

The fourth factor accounted for 1.95% of the variance and included 5 items focusing on communicating in a manner that influences others, leading others, modifying interpersonal style to persuade others and trustworthiness (Leadership).

The fifth factor accounted for 1.71% of the variance and included 7 items focusing on optimism, building strategic alliances, resisting a desire to speak when it will not be helpful and effective written communications (Relationship Management).

## GENDER DIFFERENCES

An analysis was run to identify any significant self-reported gender differences across the 17 **PeopleIndex** scales from the perspective of the employees who completed the instrument and his/her raters.

Only two significant findings emerged from this gender analysis. Self-ratings of men were significantly lower than women on the Interpersonal Sensitivity/Empathy competency ($N=127$; $F=5.82$, $p < .01$). Analysis by all raters revealed that women were rated significantly higher than men in the communication competency of Listening ($N=867$; $F=7.82$, $p < .01$).

## RATER DIFFERENCES

Each of the 17 **PeopleIndex** competencies was analyzed by rater groups to determine whether differences existed between managers, direct reports, peers/team members (N=1,135).

Results from this analysis are summarized below with significant differences observed for the competencies of Trustworthiness, Achievement, Building Strategic Relationships, Interpersonal Sensitivity/Empathy, Written Communication and Oral Presentation (all p's < .01). Manager ratings are slightly more critical than those of direct reports or peers except for the competencies of Trustworthiness and Achievement.

## PEOPLEINDEX RATER DIFFERENCES[1]

| RATER | | Trustworthy | Achievement | Building Relations | Empathy | Written Communication | Oral Presentation |
|---|---|---|---|---|---|---|---|
| Manager | Mean | 5.6010 | 5.6953 | 4.9306 | 5.2733 | 5.3223 | 5.2311 |
| | N | 151 | 160 | 144 | 150 | 151 | 132 |
| | Std. Deviation | 1.08826 | 1.12702 | 1.23273 | 1.15286 | 1.06069 | .98443 |
| Peer | Mean | 5.5810 | 5.7809 | 5.2283 | 5.4358 | 5.5259 | 5.4505 |
| | N | 636 | 680 | 514 | 643 | 644 | 606 |
| | Std. Deviation | 1.01994 | .95959 | 1.22275 | 1.17895 | 1.15434 | .95931 |
| Subordinate | Mean | 5.3404 | 5.5773 | 5.3455 | 5.2484 | 5.6015 | 5.5721 |
| | N | 498 | 495 | 357 | 525 | 522 | 506 |
| | Std. Deviation | 1.36355 | 1.23696 | 1.31572 | 1.47990 | 1.23744 | 1.16720 |
| Total | Mean | 5.4901 | 5.6951 | 5.2273 | 5.3426 | 5.5325 | 5.4767 |
| | N | 1285 | 1335 | 1015 | 1318 | 1317 | 1244 |
| | Std. Deviation | 1.17759 | 1.09343 | 1.26329 | 1.30676 | 1.18004 | 1.05546 |

[1] $p < .01$

## RELIABILITY & VALIDITY

Internal consistency reliability (Cronbach's alpha) was calculated for each of the 17 **PeopleIndex** scales. These moderately high coefficients range from .67 to .89 establishing the reliability of the instrument.

| Competency | Mean | SD | Reliability Self (N=1470 | Reliability Raters (N=1493) |
|---|---|---|---|---|
| **SELF MANAGEMENT** | | | | |
| Self Development | 5.18 | 1.09 | .67 | .74 |
| Adaptability/Stress Tolerance | 5.16 | 1.15 | .74 | .77 |
| Self Control | 5.05 | 1.20 | .75 | .79 |
| Trustworthiness | 5.51 | 1.15 | .78 | .80 |
| Strategic Problem Solving | 5.43 | 1.03 | .81 | .83 |
| Achievement Orientation | 5.70 | 1.07 | .82 | .85 |
| **RELATIONSHIP MANAGEMENT** | | | | |
| Building Strategic Relationships | 5.20 | 1.23 | .67 | .74 |
| Conflict Management | 5.00 | 1.21 | .78 | .80 |
| Leadership/Influence | 5.03 | 1.14 | .83 | .80 |
| Interpersonal Sensitivity/Empathy | 5.35 | 1.28 | .88 | .88 |
| Team/Interpersonal Support | 5.30 | 1.17 | .78 | .81 |
| Collaboration/Agreeableness | 5.35 | 1.19 | .85 | .89 |
| **COMMUNICATION** | | | | |
| Written Communication | 5.53 | 1.16 | .80 | .82 |
| Two-Way Feedback | 5.24 | 1.20 | .82 | .81 |
| Oral Communication | 5.56 | .99 | .70 | .78 |
| Oral Presentation | 5.43 | 1.04 | .67 | .79 |
| Listening | 5.28 | 1.09 | .73 | .74 |


# COMPETENCIES

## SELF MANAGEMENT

**Self-Development**
*Ability to effectively manage one's own time, energy and abilities for continuous personal growth and maximum performance.*

**Adaptability/Stress Tolerance**
*Ability to maintain balance and performance under pressure and stress. Ability to effectively cope with ambiguity and change in a constructive manner.*

**Self-Control**
*Ability to manage and control emotions and behavior in the face of interpersonal conflict. Demonstrates patience, rarely overreacts or loses control.*

**Trustworthiness**
*Demonstrates and practices high standards of personal and professional integrity. Displays honesty and candor. Creates trusting relationshisp with others.*

**Strategic Problem Solving**
*Ability to analyze a situation, identifies alternative solutions, and develops specific actions; Gathers and utilizes available information in order to understand and solve organizational issues and problems.*

**Achievement Orientation**
*Ability to accomplish tasks, projects and assignments on time and with quality*

## RELATIONSHIP MANAGEMENT

**Building Strategic Relationships**
*Ability to initiate and cultivate strategic internal and external networking relationships that foster both individual and organizational goals. Builds and maintains effective and collaborative relationships with diverse internal and external stakeholders.*

**Conflict Management**
*Ability to negotiate and effectively resolve interpersonal differences with others*

**Leadership/Influence**
*Ability to utilize appropriate interpersonal styles and approaches in facilitating a group towards task achievement*

**Interpersonal Sensitivity/Empathy**
*Ability to take actions that demonstrate consideration for the feelings and needs of others*

**Team/Interpersonal Support**
*Assists, motivates, encourages and supports others who depend on each other to accomplish tasks, projects and assignments*

**Collaboration**
*Establishes and develops cooperative, supportive and collaborative working relationships with others.*

## COMMUNICATION

**Written Communication**
*Ability to express written thoughts and ideas in a clear and concise manner*

**Two-Way Feedback**
*Ability to keep others informed in a timely manner*

**Oral Communication**
*Ability to convey oral thoughts & ideas in a clear and concise manner*

**Oral Presentation**
*Ability to present individual and organizational viewpoints to groups in a clear and persuasive manner*

***Listening***
*Ability to be attentive and understand the verbal communications of others*

Section 5

# Interpreting the PeopleIndex Feedback Report

***"One man that has a mind and knows it can always beat ten men who haven't and don't."***

***George Bernard Shaw***

The **PeopleIndex** feedback report is divided into several sections. Each section will be briefly discussed to assist with the interpretation of the summary feedback report.

- Emotional Intelligence Model
- Emotional Intelligence Competency Definitions
- Competency Summary (bar or line graphs)
- Overall Item Summary Table
- Emotional Intelligence Exercises
- Developmental Action Plan

## PeopleIndex Cover Page

**PeopleIndex** is intended for organizational coaching, leadership development and employee training purposes, rather than, personnel selection decisions. The cover page of the **PeopleIndex** summary feedback report provides an important paragraph that qualifies the use of this instrument:

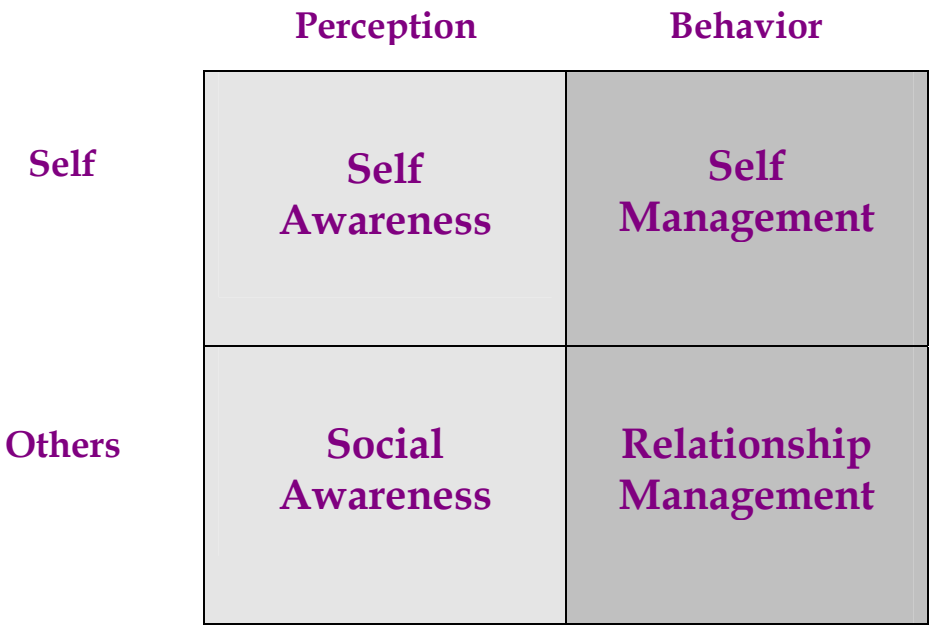
*"The PeopleIndex report is designed to provide a focus about specific emotional intelligence competency strengths and potential development areas. It should not be used as a source of information concerning personnel actions including promotion, salary, review or termination."*

The **PeopleIndex** cover will also provide the name of the client, company name, date of administration and the customized logo of the coach, consultant or company using this instrument.

## Emotional Intelligence Model

The **PeopleIndex** report provides a summary of the Goleman (1998b) model of emotional intelligence conceptually aligned with intrapersonal intelligence (self-awareness and self-management) and interpersonal intelligence (social awareness and relationship management).

In this section of the feedback report, a brief description of the history of the term "emotional intelligence" is provided. The report also provides some brief research findings suggesting that emotional intelligence is associated with diverse career and job performance outcome measures.

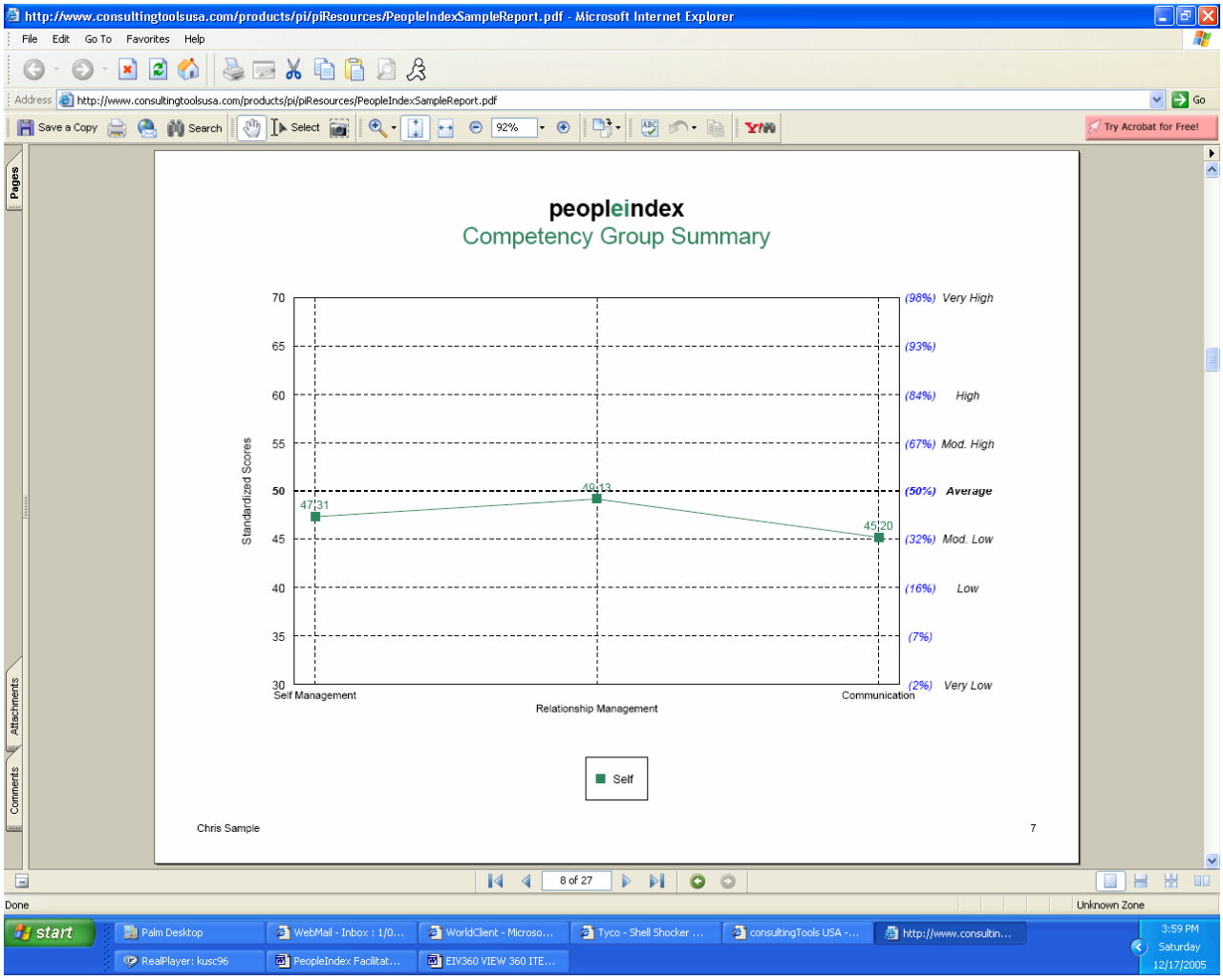


## PeopleIndex Competency Summary

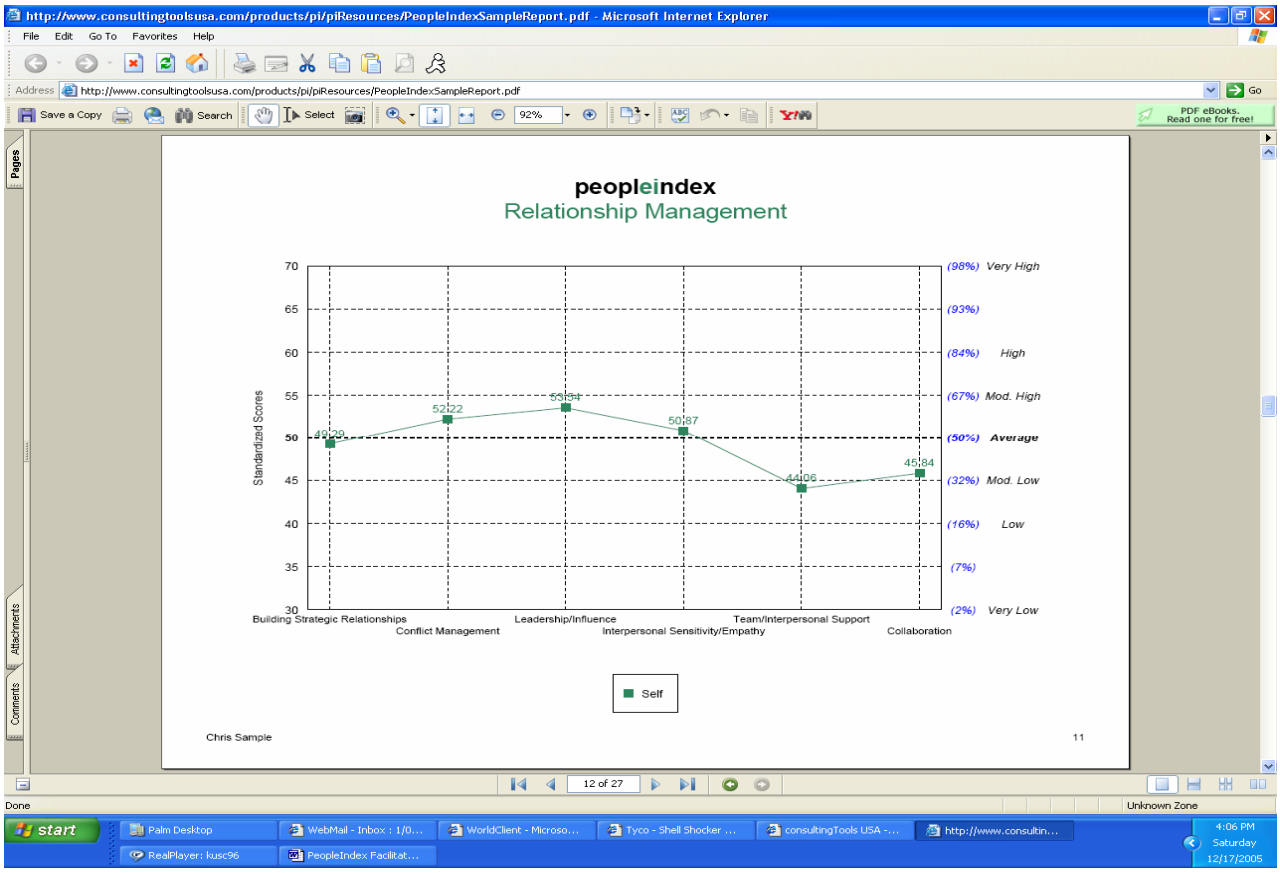
*"Who are you going to believe, me or your own eyes?"*

*Groucho Marx*

A key section of the **PeopleIndex** report is a graphic comparison of self-ratings to those in the large international normative database across the 17 emotional intelligence competency groups and competencies. Several administrative options exist for presenting the self and normative comparisons including bar or line graphs and average score comparisons or normative score comparisons (t-scores or z-scores). An example of a line graph using t-scores is shown below for a sample **PeopleIndex** report:






In these two examples (competency group summary and relationship management competencies), self-rating scores on **PeopleIndex** are being compared to those in the growing international data base using t-scores (note the bolded center dotted line corresponding to the t-score mean of 50). The percentile equivalent to each standardized score will be shown on the right axis to facilitate interpretation for those unfamiliar with the use of either t-scores (mean of 50 and standard deviation of 10) or z-scores (mean of 0 and standard deviation of 1).

In the first line graph, the participant's self-ratings are below average, relative to the **PeopleIndex** normative data base, in self-management and communication competencies. Details of the 6 Relationship Management competencies are shown above suggesting that the participant sees himself/herself as providing less team member support and collaboration relative to others who have completed this emotional intelligence self-assessment. These two areas might be worth exploring in more detail with the participant to determine whether other employees or team members might actually experience and perceive the participant in this way.

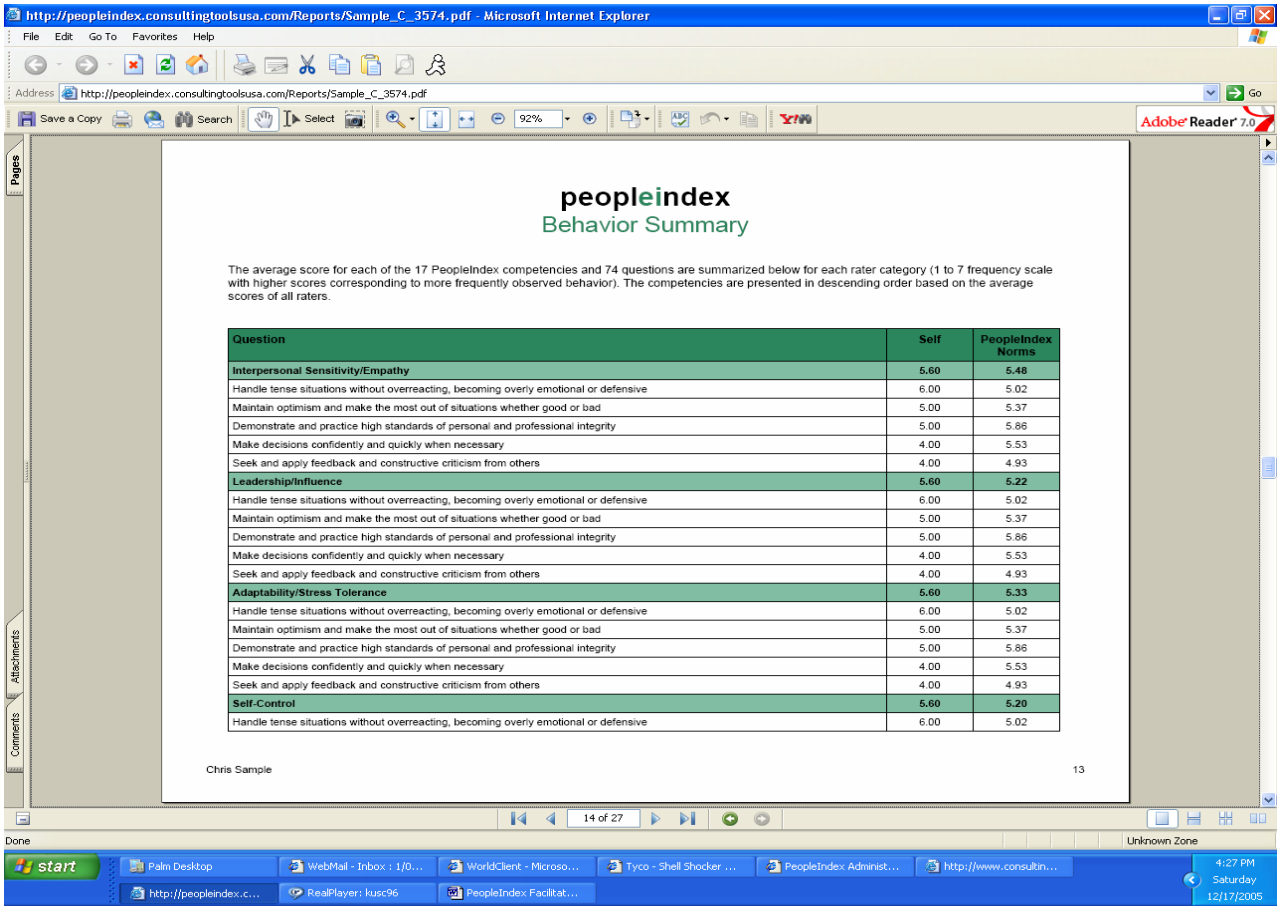
## PeopleIndex Behavior Summary Section

*"Not everything that can be counted counts and not everything that counts can be counted."*

*Albert Einstein*

This section provides a table summarizing of each **PeopleIndex** competency and item scores to those in the normative database (average scores, t-scores or z-scores). The **PeopleIndex** competencies can be presented in descending or ascending order to assist in the interpretation of the results.

In this sample report, Interpersonal Sensitivity, Leadership/Influence, Adaptability/Stress Tolerance and Self-Control were the highest rated emotional intelligence competencies (5.60) by the participant.




| Question | Self | PeopleIndex Norms |
|---|---|---|
| **Interpersonal Sensitivity/Empathy** | **5.60** | **5.48** |
| Handle tense situations without overreacting, becoming overly emotional or defensive | 6.00 | 5.02 |
| Maintain optimism and make the most out of situations whether good or bad | 5.00 | 5.37 |
| Demonstrate and practice high standards of personal and professional integrity | 5.00 | 5.86 |
| Make decisions confidently and quickly when necessary | 4.00 | 5.53 |
| Seek and apply feedback and constructive criticism from others | 4.00 | 4.93 |
| **Leadership/Influence** | **5.60** | **5.22** |
| Handle tense situations without overreacting, becoming overly emotional or defensive | 6.00 | 5.02 |
| Maintain optimism and make the most out of situations whether good or bad | 5.00 | 5.37 |
| Demonstrate and practice high standards of personal and professional integrity | 5.00 | 5.86 |
| Make decisions confidently and quickly when necessary | 4.00 | 5.53 |
| Seek and apply feedback and constructive criticism from others | 4.00 | 4.93 |
| **Adaptability/Stress Tolerance** | **5.60** | **5.33** |
| Handle tense situations without overreacting, becoming overly emotional or defensive | 6.00 | 5.02 |
| Maintain optimism and make the most out of situations whether good or bad | 5.00 | 5.37 |
| Demonstrate and practice high standards of personal and professional integrity | 5.00 | 5.86 |
| Make decisions confidently and quickly when necessary | 4.00 | 5.53 |
| Seek and apply feedback and constructive criticism from others | 4.00 | 4.93 |
| **Self-Control** | **5.60** | **5.20** |
| Handle tense situations without overreacting, becoming overly emotional or defensive | 6.00 | 5.02 |

The specific behavioral **PeopleIndex** questions measuring the competency are also shown in this Behavior Summary section. *Average score differences of .50 or more (z-scores greater than .50 or t-scores greater than 5) between self-ratings and those of the international norms might suggest meaningful gaps to explore further.* These international norms will be updated and revised periodically as the participant pool expands over time.

## Emotional Intelligence Exercises

This section provides suggested activities and exercises for enhancing emotional intelligence in the areas of self-awareness, social awareness, self-management and relationship management. It is important for coaches and consultants using **PeopleIndex** to have a through understanding about why these exercises are included and some evidence based research to support their effectiveness.

### Emotional Intelligence: What can be Changed?

Given the growing popularity of the concept of emotional intelligence, it is important to acknowledge the current controversy about overstated claims and the lack of convincing evidence based research supporting the ability to "increase" emotional intelligence. Daniel Goleman's (1995) popularization of the concept began with some carefully-worded suggestions about the power of EI and its potential for prediction in life. Those claims also reflected some considerable optimism: "No one can yet say exactly how much of the variability from person to person in life's course it accounts for. But what data exist suggest it can be as powerful, and at times more powerful, than IQ. (Goleman, 1995, p. 34). "

The claims were featured on the U.S. edition's cover, which also added the phrase "Why it can matter more than IQ," to the book's title. Upon release of Goleman's book, Time Magazine ran a cover story on emotional intelligence and the quote on the bottom left of the cover read: "It's not your IQ. It's not even a number. But emotional intelligence may be the best predictor of success in life, redefining what it means to be smart. (Time, October 2nd, 1995, cover)." The statement indicates that EI can't be quantified ("Its not even a number") and at the same time the author(s) go on to make quantitative claims for the concept (i.e., "the best predictor of success...").

There exists some limited evidence that specific EI skills and competencies can be increased through structured training, coaching and development programs (e.g., Cherniss, et al., 1998; Cherniss, 2000). Despite these limited claims, it is important to be cautious about the extent to which specific interventions can actually increase the four major building blocks of EI (self-awareness, social awareness, self-management and relationship management). Some of the most promising evidence based EI related changes appear to be in the area of increasing happiness (Lyubmirsky, Sheldon, & Schkade, 2005; Seligman, Steen, Park, & Peterson, 2005).

## Major Factors Influencing Happiness

Three primary factors appear to influence happiness (Lyubmirsky et al., 2005): 1) Genetic set point (50%); 2) Circumstances (10%) and 3) Intentional Activity (40%). It is well established that individuals adapt rapidly to life changes (both positive and negative) and soon return to their baseline levels of happiness (Seligman, et al., 2005). The happiness set point is genetically determined and is assumed to be fixed, stable over time, and immune to influence or control. At present it appears that focusing on the set point is not a fruitful avenue for happiness increase. However, one can suggest that non-genetic factors also influence a person's chronic happiness level, helping to determine whether the person falls in the lower or upper portion of his or her potential range at a particular time (circumstances and intentional activity).

Current research data suggest that changes in circumstances have limited potential for producing sustainable changes in happiness. Although this strategy can work in the short term, it probably will not work in the long term. However, we assume that, at best, satisfying basic needs of individuals can move people only up *to* their set point, but not beyond. There is good reason to believe that intentional activity can influence well-being. For example, some types of *behavioral* activity, such as exercising regularly or trying to be kind to others, are associated with well-being (e.g., Gisser et al., 2005; Nowack, 1994) as are cognitive activities (e.g., such as reframing situations in a more positive light or pausing to count one's blessings) or *volitional* activities (e.g., striving for important personal goals or devoting effort to meaningful causes).

## Research on the **PeopleIndex** Emotional Intelligence Exercises

The exercises included in the **PeopleIndex** report were selected and included based on evidence based research in the area of emotional intelligence, health and happiness. A number of researchers have argued that the ability to be happy with life is a central criterion of adaptation and positive mental health (e.g., Diener, 1984; Taylor & Brown, 1988; Csikszentmihalyi & Wong, 1991). Lyubomirsky et al.'s (2005) analysis revealed that happy people gain tangible benefits in many different life domains from their positive state of mind, including larger social rewards (higher odds of marriage and lower odds of divorce, more friends, stronger social support, and richer social interactions; superior work outcomes (greater creativity, increased productivity, higher quality of work, and higher income and more activity, energy, and flow.

Additional evidence supporting the argument that subjective happiness may be integral to mental and physical health, happy people are more likely to evidence greater self-control and self-regulatory and coping abilities (e.g., Fredrickson & Joiner, 2002), to have a bolstered immune system (e.g., Stone et al., 1994), and even to live a longer life (e.g., Ostir, Markides, Black, & Goodwin, 2000).

Recent research by Fordyce (1983; 1977); Seligman et al. (2005) and Lyubomirsky et al. (2005), provide strong evidence that specific psychological interventions can increase sustained individual happiness. For example, Seligman and colleagues (2005) found in a 6-group, random-assignment, placebo controlled internet study that 5 purported happiness interventions lastingly increased happiness and decreased depressive symptoms that lasted for 6 months. These studies suggest that encouraging purposeful practice of specific exercises can affect happiness and well-being in individuals.

The exercises included in the PeopleIndex report have been shown to have significant affects on health, well-being and interpersonal effectiveness in several published studies. These exercises are organized to support the development of EI in the four construct areas conceptualized by Goleman (1995) including:


Two important points need to be made with respect to this EI model that is supported by **PeopleIndex**. First, it is largely developmental: Self-awareness and self-management competencies and skills probably develop first followed by social and interpersonal skills (Hogan & Kaiser, 2005). More complex business and leadership skills develop later in life when work experience is greatest. Both intrapersonal and interpersonal competence would appear to be necessary for both career and life success.

Second, the EI model above is a hierarchy of trainability, with intrapersonal skills (i.e., internalized standards of performance; able to control emotions and behavior) and interpersonal skills easier to develop (e.g., leadership, influence and self-presentation, communication). The cornerstone of change is accurate self-insight and self-awareness and the ability to regulate strong emotions that contribute to the "dark side" behaviors that reflect the impressions we make on others when we behave at our worst, such as when we are sick, stressed or overwhelmed (Hogan & Kaiser, 2005).

## Overview of the **PeopleIndex** Emotional Intelligence Exercises

**Self-Awareness EI Exercises**: These exercises are designed to enhance reflection, self-insight and self-awareness about an individual's cognitions, affect and behavior. A set of structured exercises (6) can be used to facilitate a pattern of attention to one's own thoughts, feelings and emotions as precursors to any change efforts.

Several exercises in this section require specific activity (e.g., seeking feedback from others or writing a letter expressing gratitude to someone important in his/her life). Others are purely reflective in nature (e.g., keeping a log of emotions for a week, thinking about one thing each day

the individual can acknowledge gratitude about, identifying one's "signature" strengths to leverage and practice). Each of these exercises is defined below:

**Emotions Log**: Keep a written stress and emotions log for a week. Describe the type of stressor and corresponding emotions it elicited. Rate the level of stress (low, moderate, high), your thoughts, emotions (positive or negative) and specific actions you took to manage your emotions productively. Review your log at the end of each day and reflect upon your behavior and responses.

**Identifying Your Signature Strengths**: List and identify your "signature" strengths, skills, knowledge and abilities (i.e., those things you have natural talent and do well). Rate each one according to your level of interest in using these signature strengths (low, moderate, high) at work or home. Note the "signature strengths" you have rated as having a "high" interest to utilize.

**Seek Feedback**: Share your PeopleIndex feedback report with two people: 1) a supporter who values your style and strengths; and 2) a possible critic of your style. Ask both for his/her reaction to the report and what strengths and potential development areas they would say about you. Compare the reactions and feedback from both and note any similarities and/or differences. How does the feedback compare to your self-perceptions? What input and feedback can you use to improve your overall emotional intelligence?

**Gratitude Appraisal**: Each day for a week, reflect and write down one thing you feel truly blessed about in your life and why (e.g., aspects about your health, family, work/home situation). Evaluate how gratitude impacts your overall well-being.

**Gratitude Gift**: Identify someone in your life who has made it richer or has contributed to your development in a significant way and has not really been properly thanked or acknowledged. Write that person a short note or letter expressing what he/she has meant to you and how you value what they have done to enrich your life. Visit the person and deliver the letter or mail it to them if this is not possible.

**Daily Affirmation**: Each day for a week actively reflect upon and write down one thing about the day that was positive and enjoyable. What was it that made it positive? How did it make you feel?

**Self-Management Exercises**: These exercises are designed to enhance a purposeful translation of awareness of one's thoughts, feelings and emotions into emotionally intelligent behavior. A set of structured exercises (4) can be used to facilitate practice in managing potential self-destructive thoughts and behaviors. Each of these exercises is defined below:

**Utilizing Your Signature Strengths**: Select one or two "signature" strengths rated high in the previous Self-Awareness exercise and that you are interested in using more (knowledge, skills, abilities, talents). For one week, attempt to use one of your "signature" strengths in a new and different way. Keep a journal to chronicle how you have used this strength and how it made you feel to employ it in work and non-work activities. Reflect on how you can continue to expand the use of your "signature strengths" on an ongoing basis for work and pleasure.

**Life Balance Wheel**: Each week contains a total of 168 hours. Write down how you many hours you actually spent doing activities such as sleeping, eating, working, fun/recreation, travel, family responsibilities, personal development, other. Now rate the quality of each category you created and spend time doing on a 1 to 10 scale where 10=Very Satisfied and 1=Very Dissatisfied. How balanced is your life? What areas are you most unsatisfied with? What specific actions can you take to facilitate increasing life satisfaction?

**My Reactive Style**: Write down and describe how you typically behave and feel for each of these: 1) Difficult people you interact with (who are they and why are they "challenging" for you?); 2) When you are stressed (how do you typically express stress emotionally, cognitively and behaviorally?); and 3) When in conflict with someone (what is your conflict style—competitive, collaborative, compromising, accommodative or avoidant?). For each, reflect on what you can do differently to handle the situation in a more productive manner leading to healthy emotions, reactions and outcomes.

**Personal Development Plan**: Identify a personal or professional plan for the next 12 months that you would like to accomplish—one that you can identify that you are truly motivated and ready to begin to work on (i.e., you have a high readiness to change). Write out this plan with specific action steps and a way to evaluate progress. Make a note of this professional goal and put it in a visible place you will be able to see it each day (e.g., on your PDA, laptop, desk). Publicize and announce this plan to a colleague, friend, family member, partner, coach or mentor.

**Social Awareness Exercises**: These exercises are designed to enhance increasing awareness about defining one's interpersonal, communication and leadership style, how it might be perceived by others and how it might impact other's feelings and behavior. A set of structured exercises (4) can be used to facilitate practice in observing and tuning into the behaviors and feelings of others while monitoring one's own interactions. Each of these exercises is defined below:

**Engaged Listening**: Each day for a week, engage with a friend, worker, family member or co-worker to actively listen when interacting with them to increase empathy and understanding of others. Try to speak less, summarize what you have heard before expressing your thoughts and opinions, and reflect back the feelings you seem to be interpreting based on both the content of what others share with you and his/her non-verbal behaviors (e.g., use phrases such as "It seems like you are saying…" or "I'm hearing" or "I sense you are feeling…").

**Network Circle:** Draw a large circle and write the names of those family members, friends, co-workers, partners, significant others inside whom you would identify as your <u>most</u> import supporters and those closest to you (e.g., those who provide information, emotional support, direct assistance etc.). Next to each person's name in your circle, note how often you have actually <u>utilized</u> or interacted with the individual in the last month (L=low extent, M=moderate extent, H=high extent). Finally, reflect on how satisfied you were with the quality of the interaction or support they provided to you.

**My Interpersonal Style**: Take a popular personality, interpersonal or social style assessment instrument to identify your own approach to communicating, leading, thinking, and managing relationships with others. Identify people in your life (work, family, friends) with whom you would like to improve your relationship with and using the model behind the instrument you took, identify his/her style and reflect on how you can strengthen your interactions (e.g., by understanding he/she is logical you might be able to provide an analytical and a non-emotional approach to resolve conflict and work more cooperatively).

**Self as a Model**: Write about a recent time when you were at your best while interacting and working with others—displaying and utilizing your "signature strengths" to accomplish something of importance that left you feeling particularly satisfied, empowered and confident. Review your story each night for one week and reflect on the strengths you utilized and the feelings that came with their successful deployment.

**Relationship Management Exercises**: These exercises are designed to enhance specific communication and interpersonal interactions. A set of structured exercises (3) can be used to facilitate practice in developing assertiveness, feedback, conflict management. Listening and probing skills required for successful interpersonal interactions. Each of these exercises is defined below:

**Relationship Energizers**: Make a list of people in your life that are "energy drainers" (those who are difficult, challenging, frustrating, annoying and tire you out). What is it that makes the social interactions with these individuals less pleasurable and desirable? Learn to say "no" to these individuals and reflect on plans to minimize or eliminate interactions with these individuals.

**D-E-S-C Technique**: Identify someone meaningful at work or home whose behavior, if changed, would improve the quality of your relationship. Write out four brief sentences to provide this individual with feedback and request a specific change in behavior using the **D-E-S-C** technique: 1) **D**escribe (describe specifically and in behavioral terms what the individual is doing or not doing that is challenging for you. Focus on behaviors and not his/her personality; 2) **E**xpress how the behavior makes you feel (use and

"I" statement to share the impact on your feelings); 3) **S**pecify the specific behaviors you would like the individual to make (i.e., share what the person should do more, less or differently to meet your needs or be less of a challenge to you); and 4) **C**onsequences (share the first the positive consequences that his/her changed behavior will have on you and your relationship.

You might also consider negative consequences of what you will do if the behavior does not change if that would be received in a non-defensive manner and facilitate motivation to change). Rehearse these four steps out loud and initiate a meeting with the individual to utilize the **D-E-S-C** technique. If you are interrupted at any step, just go back and complete that step until you have expressed the behavior you want changed.

**Give-Get-Merge-Go Technique**: To facilitate being experienced as involvement oriented and open to non-defensively resolving conflict with others, practice using the **Give-Get-Merge-Go Technique:** 1) **Give** your point of view (express your idea, thought, suggestion or opinion); 2) **Get** his/her point of view (ask explicitly and directly what reactions the individual has to your ideas); 3) **Merge** your point of view and theirs by summarizing what you have heard the other person has said (don't debate, provide more rationale for your point of view or ask questions during this step); and 4) **Go** and review the areas where you agree and areas where you disagree.

Either reach a closure to the conversation or ask what next steps need to be taken to move ahead in your interpersonal interaction. Identify someone meaningful at work or home and practice the **Give-Get-Merge-Go Technique**. Review and evaluate how your relationship can be improved.

## Developmental Action Plan

***"If you don't know where you are going, you will wind up somewhere else."***

***Yogi Berra***

This section provides a structured set of worksheets for summarizing strengths and developmental opportunities that come out of the **PeopleIndex** feedback report. This is an important section for participant's to complete to synthesize the data provided in the summary report and enhance commitment to a specific professional development plan based on the **PeopleIndex** developmental planning model (assess, reflect, plan, implement, evaluate) shown in Figure 1 below.

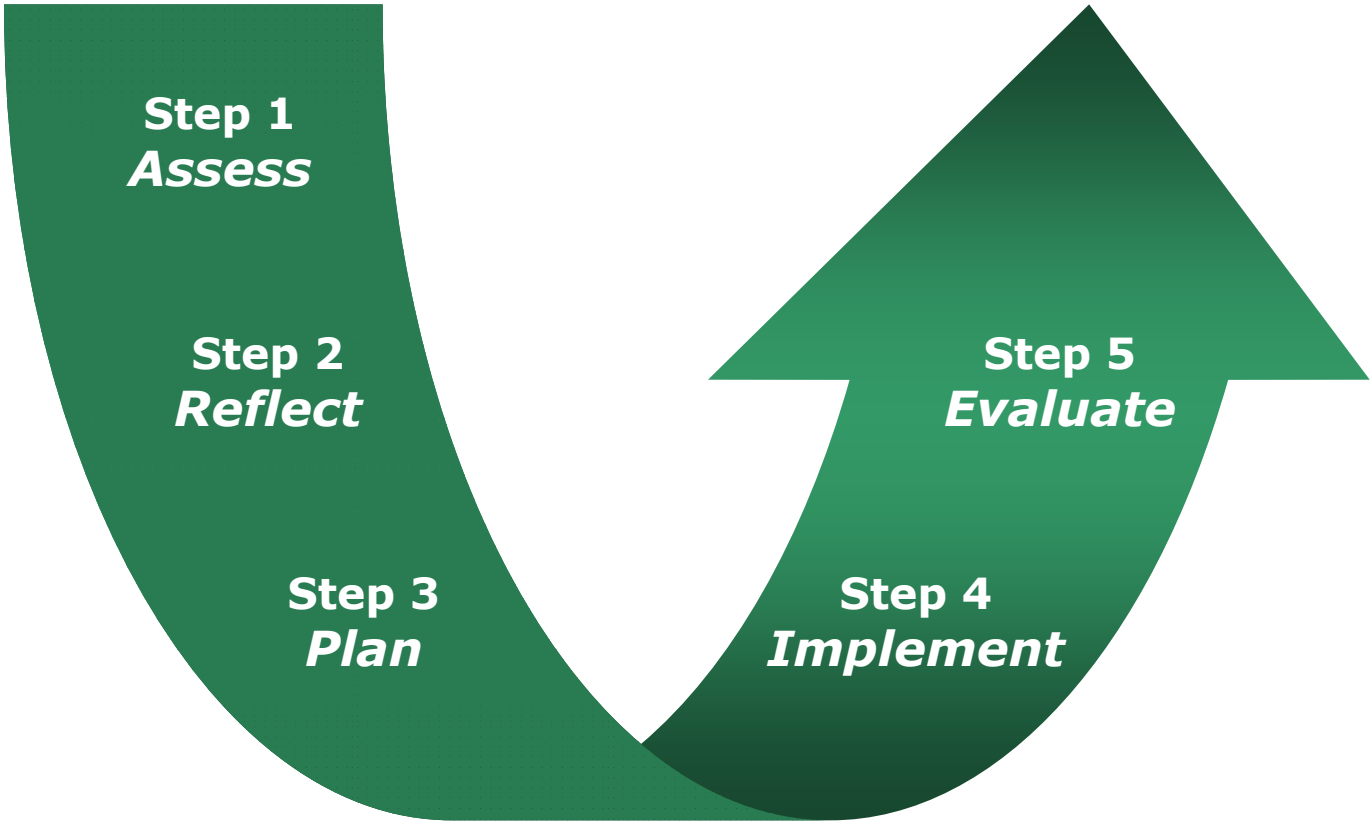
Research suggests that successful behavior change is enhanced when specific behavioral goals are defined and evaluated. The developmental action plan approach provided in the **PeopleIndex** feedback report is designed to assist in the development of SMART (specific, measurable, action oriented, realistic and time bounded) goals.

Coaches and trainers using the **PeopleIndex** should encourage the completion of these developmental action plan worksheets and discuss barriers and concerns about successfully implementing a specific developmental plan to enhance individual effectiveness. A key component of the action plan worksheets is a focus on feelings and emotions that the individual might have in response to the feedback received from multiple perspectives (e.g., from one's own manager, team members, direct reports, etc.).

Coaches and trainers should emphasize that the individual should use his/her feedback as perceptual data to be considered, weighed and evaluated as part of a commitment to a targeted professional development program. Additional feedback might be sought to clarify and enhance understanding of how one's behavior is experienced and perceived by others based on the results of the **PeopleIndex** report. Coaches and trainers should also suggest that individuals consider re-administration of the **PeopleIndex** instrument in 10 to 12 months as a means of monitoring, tracking and evaluating behavior change efforts.

Figure 1

**PeopleIndex** Development Planning Model



Section 6

# Suggestions on Giving Feedback with the PeopleIndex Report

*"We are what we repeatedly do."*

*Aristotle*

The **PeopleIndex** feedback report is rich in data and information. It is important to approach the feedback meeting with your clients (individual or workshop) in a supportive manner that will maximize integration of the information contained in the report to facilitate development planning.

This guide provides information and details about the different sections of the report. It is recommended that the following approach be used in providing feedback with clients using this instrument. It is always important to utilize active listening and probing skills during the feedback session with your client and be prepared for some expected defensiveness on the part of your client.

It is important to keep in mind the **PeopleIndex** feedback results can be powerful data to facilitate behavioral change efforts aimed at improving self management, relationship management and communication skills. Remember that all behavior change requires the following three elements in order to be effectively sustained (Nowack & Heller, 2001):

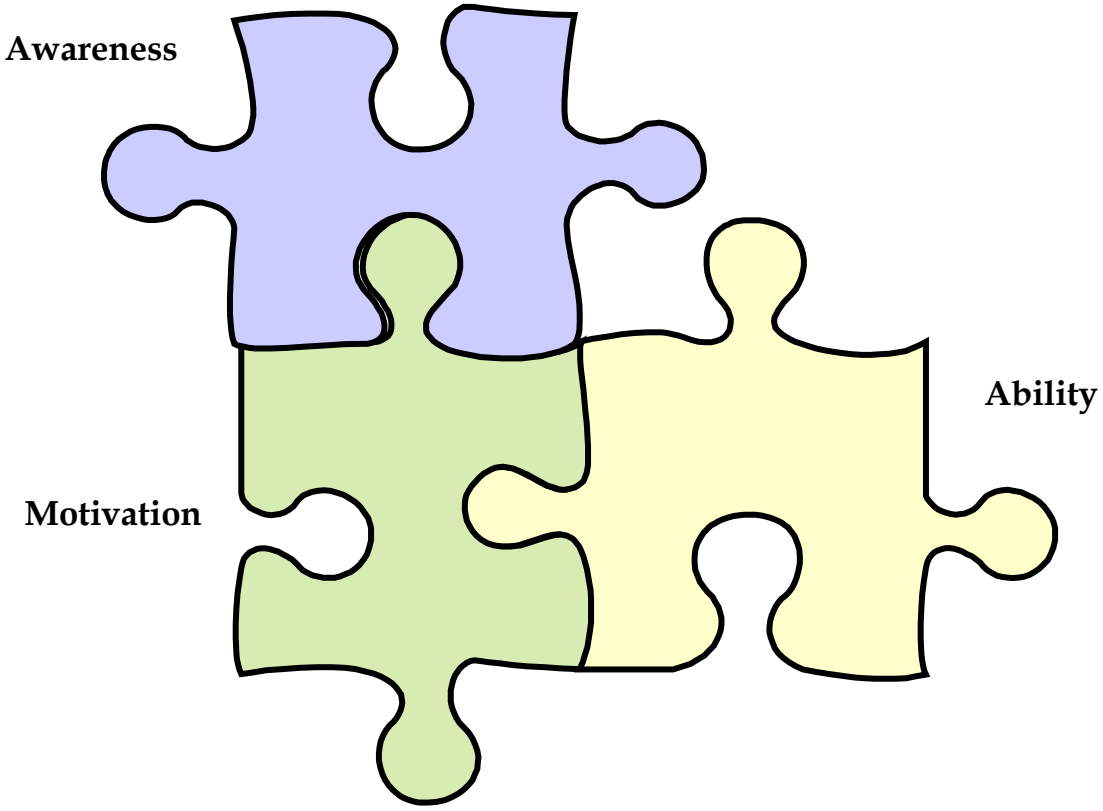
- **Awareness**--The individual must know <u>what</u> to change in order to initiate a behavioral change effort in the first place. The **PeopleIndex** results provide targeted information to assist the individual to better understand his/her strengths viewed by others and to compare self-perceptions to those of others.

- **Motivation/Self-Esteem--**The individual must <u>want</u> to change and feel confident that he/she can be successful in both initiating and maintaining changes in his/her behavior. Individuals who lack motivational "readiness" will be least likely to initiate behavioral changes and sustain them for any reasonable length of time.

- **Ability--**The individual must possess the ability to change his/her behavior. Each individual has a unique set of abilities that can be improved with motivation and practice. However, the capability to be adaptable or improve a skill/ability may be highly individualized. Some individuals can develop "mastery" of complex and difficult skills/abilities. Others can merely improve his/her proficiency within a "band of competence."

Figure 2

Successful Behavior Change Elements




The first step in the feedback process is thoroughly understanding the **PeopleIndex** report and interpreting the results. Interpretation is definitely something you should not do "on-the-fly." You should be prepared to offer suggestions about actions the person might take developmentally in response to the feedback.

Most importantly, you should keep in mind that the feedback process is much more than an intellectual process. The emotional responses that are likely to emerge during the feedback (e.g., defensiveness, anger, denial) can act to either enhance or suppress self-insight and learning.

So, before giving feedback, make every effort to anticipate how the person is likely to react emotionally to the information that he or she is about to receive. Your role is to help your client work through any potential negative emotional reactions from interfering with positive self-insight and motivation to improve in specific areas.

## BREAKING THE ICE

The feedback process can evoke some tension and strong emotion in the person receiving his/her **PeopleIndex** summary feedback report. The more you can ease your client's potential anxiety, the better the flow of the feedback process.

A good technique for easing tension, establishing rapport and breaking the ice is to spend some time talking about the person's background (e.g., work history). Even if you already know the person well, this is a very useful "getting started" activity. It frequently reveals information that you may not have known, shedding additional light on the **PeopleIndex** results. Later in the feedback session, it may give you something concrete to refer to in an effort to link the **PeopleIndex** results to actual work behavior and situations.

Most important, it requires active involvement and participation from the person receiving feedback. As anxiety and tensions ease, you can now begin active listening, establishing your role as a facilitator rather than the "talker" and "teller." Remember, you are hoping to help your client understand the results and use this data to improve critical interpersonal, social and self management competencies—one of which is to identify and control emotions and constructive behaviors that come from strong emotions.

# SUGGESTED PEOPLEINDEX FEEDBACK PROCESS

The following steps are suggested as a way to conduct an individual coaching feedback meeting with your client using the results from the **PeopleIndex** summary report:

1. Clarify the feedback meeting goals and provide an overview of the meeting (confidentiality, use of the data, who will receive the report, implementation of a developmental action plan, role of the client's manager in the feedback process, etc.). Answer any questions that the client has about these goals to minimize any anxiety and apprehension about reviewing the report.

2. Review the **PeopleIndex** competency model and brief description of how the report is structured. Become familiar with and review the **PeopleIndex** competencies.

3. Review the developmental action plan worksheet pages to set up an expectation that the result of the summary feedback report is to leverage the application of strengths and facilitate further development in specific emotional intelligence competency areas.

4. Review the Competency Group and Competency bar graph or line graph section. This section will compare and contrast self-perceptions to the **PeopleIndex** international norms.

5. Review the Behavior Summary Section. This section will summarize the specific **PeopleIndex** questions under each competency group and present the data in either ascending or descending order (this is determined by the coach, consultant or project administrator) to facilitate ease of understanding and interpretation.

6. Review and discuss the Feedback Interpretation section and the development model supporting **PeopleIndex** (assess, reflect, plan, implement, evaluate). Become familiar with the recommended emotional intelligence exercises included in the summary feedback report. Separate exercises are presented for facilitating development in each of the four emotional intelligence areas including self-awareness, self-management, social awareness and relationship management. Each EI exercise has shown to be

effective to increase happiness, reduce psychological distress and enhance interpersonal effectiveness in published research. Encourage your client to select and practice one or two exercises and consider incorporating it into his/her daily life.

7. Encourage your client to complete the development planning section of the **PeopleIndex** report. This section provides a structured approach to identify specific behaviors and action plans to enhance emotional intelligence. Ask your client to initiate a developmental action plan with your input and guidance using SMART objectives.

8. Discuss next steps (e.g., sharing his/her report with others, soliciting feedback from others, completing the development plan, scheduling another re-assessment in 10 to 12 months, etc.). Answer any specific questions the client might have and determine the client's readiness to change. Schedule a follow up meeting to discuss the completion and implementation of the professional development action plan.

# Appendix A
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# Appendix A
# **Research**

**Buvoltz, K., Powell, F. & Solan, A. (2007). Exploring Emotional Intelligence, Learner Autonomy and Student Success in Accelerated Undergraduate Degree Completion Programs. Unpublished manuscript.**

***Objective:*** To explore the relationships between emotional intelligence and learner autonomy among students enrolled in an adult degree completion program. We hypothesized a positive statistical relationship between emotional intelligence and learner autonomy and that they both contribute to higher GPAs and higher retention rates.

***Measures***: PeopleIndex and the learner autonomy intentions measured the Learner Autonomy Profile (LAP) Short Form (SF) were used in this study. The LAP-SF measures a learner's intentions in the areas of learner desire, learner resourcefulness, learner initiative, and learner persistence  Student success was measured by cumulative grade point average (GPA).

***Design***: One-hundred forty-one nontraditional undergraduates enrolled at a small, private, liberal arts college in the northeastern U.S. completed web-based surveys measuring emotional intelligence and learner autonomy.

***Results***: The researchers predicted there would be a positive relationship between emotional intelligence and learner autonomy. They tested this hypothesis by running Spearman's rho correlations using overall emotional intelligence scores and overall learner autonomy scores (as opposed to using sub-constructs). For this test, they only used participants who completed both PeopleIndex and the LAP-SF (N=86). They found a positive correlation ($r = .486$; $p = .000$; $< .01$). There is no demonstration of cause and effect; however, there is a strong positive correlation.

They also predicted that there is a positive relationship between EI & LA and retention. For this test, they only used participants who completed both PeopleIndex and the LAP-SF (N=86). The final number of participants for this test was 73. We tested this hypothesis by conducting logistic regression. We loaded all three group level EI constructs (self-management, relationship management, and communication) as well as all four learner autonomy constructs (learner desire, learner resourcefulness, learner initiative, and learner persistence) as independent variables. The dependent variable was retention (graduates and non-graduates). Of the PeopleIndex competency groups, communication ($p = .051$) and relationship management ($p = .022$) were the highest predictors of retention. Overall scores on

**PeopleIndex** were the single best predictor of overall learner autonomy. Self-management, but not Communication or Relationship Management was significant predictors of learner autonomy in regression analyses.

***Conclusions***: **PeopleIndex** was significantly associated with both retention and learner autonomy. These findings provide both construct and criterion related validity of **PeopleIndex.**

**Yusof, R. (2006). The Relative Influence of Emotional Intelligence and Organizational Commitment on Job Performance of Administrators in UiTM. Unpublished Dissertation, University of Putra Malaysia**

***Objective:*** To explore the relationships between emotional intelligence, organizational commitment and job performance in administrators.

***Measures***: The data collection instruments used included the Management View 360 Questionnaire as an index of job performance, **PeopleIndex** for emotional intelligence and Organizational Commitment Questionnaire for organizational commitment.

***Design***: The population in the study is the administrative management group of UiTM. There are fourteen UiTM branch campuses from all states in Malaysia including the main campus at Shah Alam. The management group is composed of the assistant registrars, librarians and treasury officers. The researcher got the name list of administrative management group from UiTM main campus at Shah Alam. The total sample size for this study was 153 administrators who were administered all questionnaires used in this study by mail.

***Results***: Job performance was positively related to emotional intelligence ($\underline{r}$ = .761, $\underline{p}$ = 0.001) and organizational commitment ($\underline{r}$ = .366, $\underline{p}$ = .001). The strongest relationship was found to exist between job performance and emotional intelligence, followed by organizational commitment and job performance. The positive correlation coefficient of emotional intelligence ($\underline{r}$ = .761, $\underline{p}$ = 0.001) indicates that as emotional intelligence increases, so does job performance. And job performance was also positively related to organizational commitment ($\underline{r}$ = .366, $\underline{p}$ = 0.001). Job performance is positively related to emotional intelligence dimensions: self-management ($\underline{r}$ = .742, $\underline{p}$ = 0.001), relationship-management ($\underline{r}$ = .746, $\underline{p}$ = .001) and communication ($\underline{r}$ = .766, $\underline{p}$ = .001). They are all statistically significant. Overall emotional intelligence was significantly associated with organizational commitment ($\underline{r}$ = .354, $\underline{p}$ = .001).

***Conclusions***: The results of the study revealed that all the emotional intelligence dimensions are positively related to job performance with the highest correlation of 0.766 for communication, followed by 0.746 with relationship-management and

self-management (0.742). Emotional intelligence is also significantly correlated with organizational commitment. Overall, these findings provide additional criterion related validity of the **PeopleIndex** measure of emotional intelligence.

**Agustin, V. et al. (2006). The Relationship Between the Competencies of Emotional Intelligence and the Performance of Selected Junior Thomasian Nursing Students in their Related Learning Experience Course. Unpublished Manuscript**

***Objective:*** This study explored the relationship between emotional intelligence and performance of third year nursing students in a clinical course.

***Measures***: Emotional Intelligence View 360, Clinical evaluation scores on Nurses Related Learning Experience (RLE; 60% professional and 40% personal), and overall grade point average.

***Design***: The population in the study was 48 third year nursing at the University of Santo Tomas, College of Nursing. Students were asked to complete the Emotional Intelligence View 360 as part of their curriculum during the year.

***Results***: Self-Management competences were significantly correlated (all p's< .01) with RLE scores for both self ratings (ranged from .40 to .93) and other ratings (ranged from .69 to .99). Relationship Management competencies were significantly correlated (all p's< .01) with RLE scores for both self ratings (ranged from .40 to .93) and other ratings (ranged from .55 to .98).

Finally, Communication competencies were all significantly correlated (all p's < .01) with RLE for both self-ratings (ranged from .66 to .99) and other ratings (ranged from .63 to .99). Self and other emotional intelligence ratings were significantly associated with overall grade point average ranging from .84 to .97 (all p's < .01).

***Conclusions***: The results of the study suggest that high levels of emotional intelligence assessed by **Emotional Intelligence View 360** are associated with academic and clinical success in nurses. These findings provide support for criterion related validity of this measure.

**P**

**edro, M. L. (2006). Emotional Intelligence and Transformational Leadership. Unpublished Manuscript. Masters Thesis, University of Edora.**

***Objective:*** This study explored the relationship between emotional intelligence and transformational leadership.

***Measures***: Emotional Intelligence View 360 and the Multi-Factor Leadership Questionnaire (MLQ-36).

***Design***: The population in the study was 57 managers in a multinational company within the electronics industry.

***Results***: Transformational leadership scales of the MLQ-36 were significantly associated with Self-Management ($r = .93$, $p < .01$), Relationship Management ($r = .70$, $p < .01$) but not Communication competencies ($r = .52$, $p = .16$). Transactional leadership was significantly correlated with Self-Management ($r = .95$) but not significantly with Relationship Management ($r = .70$) or Communication ($r = .36$). Finally, Laissez-Fair leadership was not significantly correlated with Self-Management ($r = -.15$), Relationship Management ($r = -.42$) or Communication ($r = .40$).

Transformational leadership was significantly correlated with Transactional Leadership ($r = .91$, $p < .01$) and modestly correlated with Laisse-Faire Leadership ($r = .40$).

***Conclusions***: The results of the study suggest that high levels of emotional intelligence assessed by **Emotional Intelligence View 360** are associated with various aspects of Transformational and Transaction Leadership. The significant association between Relationship Management measured by **Emotional Intelligence View 360** and Transformational Leadership provides some evidence of construct validity of this measure.

**Flores, M. (2007). Emotional Intelligence and Transformational Leadership. Unpublished Manuscript.**

***Objective:*** This study explored the relationship between emotional intelligence and transformational leadership.

***Measures***: Emotional Intelligence View 360 and the Multi-Factor Leadership Questionnaire (Avolio & Bass).

***Design***: The population in the study included 23 female managers from several businesses/industries from Canada (6), Mexico (10), and the UK (7).

***Results***: Regression analysis was calculated using the MLQ variables as the dependent variables and the total EQ and its three principal areas (self management, relationship management and communication) as the independent variables and predictors. As shown below, the strongest positive relationship found was the one between total EQ and total Transformational leadership (r=0.67). While the weakest positive relationship was between one of the components of transactional leadership: management by- exception (Active) and total EQ (r=0.15). The coefficient of determination for the correlation between total EQ and total Transformational leadership was 0.45 ($r^2$=0.45).

*Correlations among total EQ and MLQ Variables*

| Variable | TT | IIA | IIB | IM | IS | IC | TTR | CR | MEA | MEP | LF |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **EQ** | 0.67 | 0.55 | 0.6 | 0.57 | 0.28 | 0.48 | 0.47 | 0.62 | 0.15 | -0.37 | -0.16 |

***Notes:*** *EQ= total emotional intelligence; TT = Total Transformational; IIA= Idealised Influence (Attributed); IIB= Idealised Influence (Behaviours); IM= Inspirational Motivation; IS= Intellectual Stimulation; IC= Individual Consideration; TTR= Total Transactional; CR= Contingent Rewards; MEA= Management by- Exception(Active); MEP= Management by Exception(passive); LF= laissez-faire.*

*Correlations among the three main areas of EQ and total Transformational variables (r)*

| Variable | Self Management | Relationship Management | Communication |
|---|---|---|---|
| **Total transformational** | 0.66 | 0.65 | 0.54 |

***Conclusions***: The results of the study suggest that high levels of emotional intelligence assessed by **Emotional Intelligence View 360** are associated with various aspects of Transformational and Transaction Leadership. The significant association between **Emotional Intelligence View 360** and Transformational Leadership provides some evidence of construct validity of this measure.

**Rocha, A. (2007). The Relationship between Emotional Intelligence and Transformational and Transactional Leadership. Unpublished Manuscript**

***Objective:*** This study explored the relationship between emotional intelligence and transformational leadership.

***Measures***: Emotional Intelligence View 360 and the Transformational Leadership Scale (Podsakoff et al. 1990). A measure of satisfaction with leadership, global satisfaction, and follower's performance were also included in this study.

***Design***: The population in the study was 120 managers working within a banking organization in Portugal and 299 of their direct reports.

***Results***: Using a correlational research design, results confirmed the existence, in the perception of leaders and followers, of: (1) greater levels of EI and transformational leadership in leader perception in comparison to followers (all p's < .05)); (2) a positive correlation between perceptions of overall EI, Self-Management, Relationship Management and Communications and transformational leadership behaviors in leaders (r = .74, .68, .76. 64, respectively; all p's < .01)), and (3) a positive correlation between EI, transformational leadership behaviors in leaders and performance and satisfaction in their followers (only the EI communications scale significantly was associated with follower's performance; r =.18, p < .05).

An exploratory principal components factor analysis with Varimax rotation revealed 5 factors with eigenvalues over 1.0 all accounting for over 57% of the explained variance. The first 3 factors found in the 5 factors forced factor analysis seem to be associated to a kind of g factor of emotional intelligence (accounting for 44.94%, 3.79% and 3.41% of the variance); the 4th factor is associated with emotional competencies which are considered relevant to organizational context (2.90%) and, the 5th factor seems to be concerned with the dimension *Relationship Management* (2.08% of the variance).

Global EI was also significantly associated with both transformational leadership (r = .74) and transactional leadership (r = .59), all p's < .01). Each of the three EI scales (Self-Management, Relationship Management and Communications) was also significantly associated separately with transformational and transactional leadership measured by the Transformational Leadership Scale (Podsakoff et al. 1990).

***Conclusions***: The results of the study suggest that high levels of emotional intelligence assessed by **Emotional Intelligence View 360** are associated with various aspects of Transformational and Transaction Leadership. The significant association between **Emotional Intelligence View 360** and Transformational Leadership provides some evidence of construct validity of this measure.

**Roblyer, M. Z. (2008). Emotional Intelligence and Its Relationship to Student Team Effectiveness. Unpublished Manuscript**

***Objective:*** This study is exploring the relationship between emotional intelligence and team performance.

***Measures***: PeopleIndex, Team Satisfaction (Earley & Mosakowski); Team Learning Scale (Druskat & Kayes); Instructor Ratings of team performance; Peer ratings using the Team Building Scale (Maurer, Raju & Collins); Rosenberg Self-Esteem scale; Trust among team members (Earley & Mosakowsi) and the Big Five Personality Inventory (BFI; John).

***Design***: The population in the study will consist of 60 teams (approximately 150) graduate students in the Organizational Dynamics, Human Relations & Social Work program

***Results***: Available 2008

***Conclusions***: