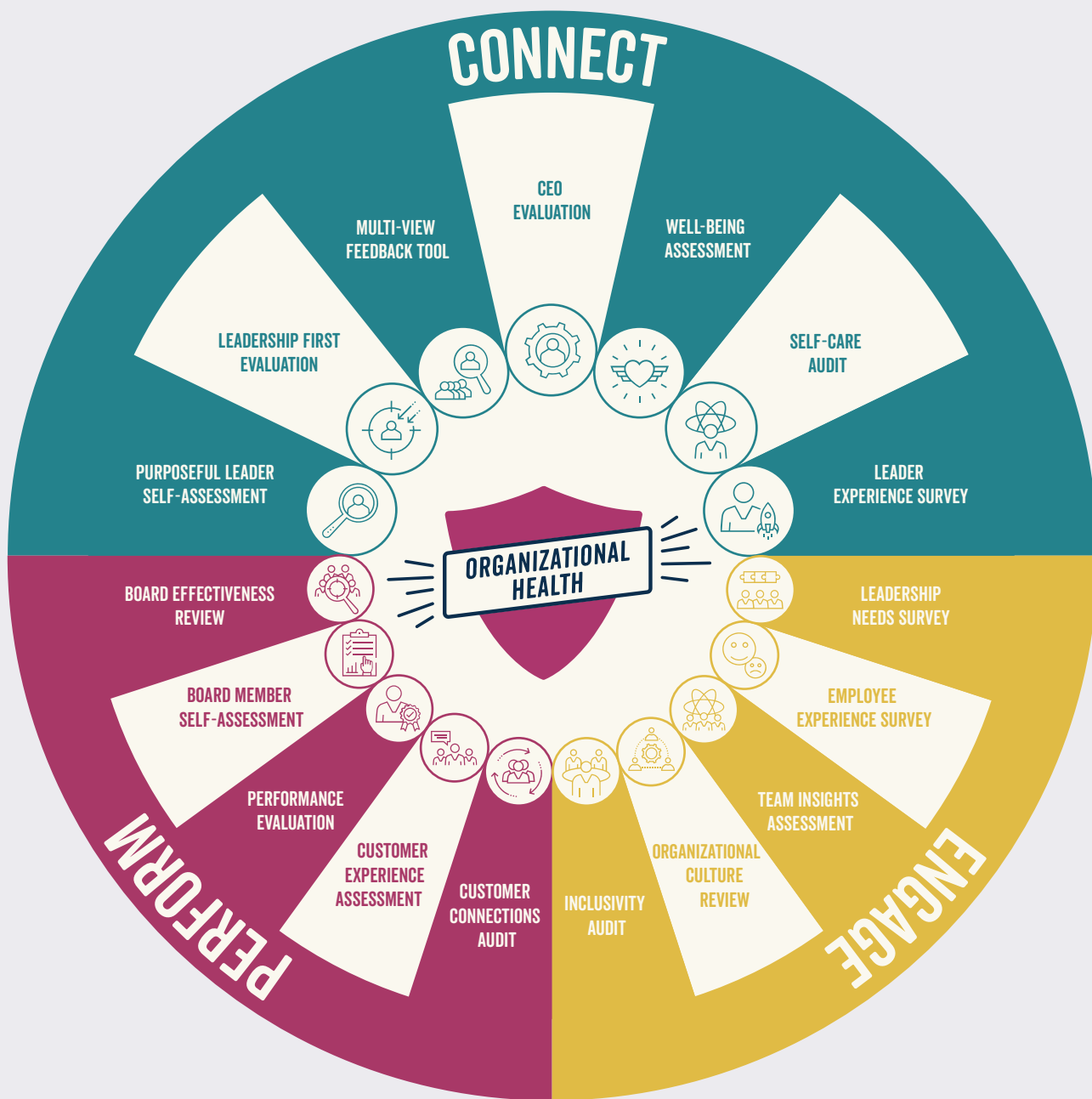


ENERGIZE **E** LEADERSHIP  
ASSESSMENT TOOLS OVERVIEW

➤ ASSESSMENT-BASED ORGANIZATIONAL HEALTH METRICS





## PURPOSEFUL LEADER SELF-ASSESSMENT

Being a leader is challenging and it is hard to know where to look for the right support along the journey. We make it easier to gauge where you are so you can carve out the best path forward.

The best leaders lead with purpose and intention and we have built a self-assessment tool to help leaders reflect on several holistic dimensions that matter for both the leader him/herself as well as the organization and the people he/she supports. Being a great leader means focusing on yourself just as much as you focus on others – so you can all produce the best results and make the strongest impact.

Our self-assessment helps leaders gain deeper perspective into where they excel and where there are opportunities for adjustment, so they can get rooted in an intentional way of leading, reduce the overwhelm and self-doubt, and truly ignite the leader within.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A thorough self-assessment tool for leaders to assess themselves along critical dimensions of leadership	An action plan for areas of development focus	All levels of leaders if not receiving Multiview Feedback from a 360-degree tool	Annual if not receiving Multiview Feedback from a 360-degree tool. This assessment is utilized in many of our leadership programs and coaching engagements and is very useful as leaders transition into new roles.



## LEADERSHIP FIRST EVALUATION

There are fundamental practices that separate great leaders from the rest. Our **FREE** Leadership First Evaluation helps quickly detect areas that, when honed, can markedly improve leadership impact.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A quick-pulse self-evaluation for leaders to evaluate whether they are appropriately prioritizing foundational leadership activities	An action plan for areas of development focus	All leaders at all levels	Annual to help leaders plan their leadership strategy for the next fiscal year. This assessment is also utilized in many of our leadership programs and coaching engagements.



## MULTI-VIEW FEEDBACK TOOL

Energize Leadership's Multiview Feedback Tool is a highly effective development instrument that provides leaders with critical insights to strengthen their relationships and increase their results.

Through the feedback process leaders gain awareness of how others experience their leadership and are able to clearly define actions to reinforce relationships, increase engagement, and determine how to effectively channel their talents for continued growth and success. Leaders are supported in receiving the feedback, and transforming it into immediate purposeful action. Our feedback process is designed to directly strengthen a leader's level of emotional intelligence and encourage increasing frequency and effectiveness of performance dialogue at all levels.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A 360-degree assessment tool for leaders to receive feedback from peers, direct reports, managers, and other stakeholders to help strengthen their relationships and increase their results. Also includes a "Progress Pulse" that can be used to gauge progress in designated areas	<ul style="list-style-type: none"> <li>• A full report</li> <li>• Trackable data points</li> <li>• An action plan</li> <li>• Short Video Insights on the Assessment and Report</li> <li>• Coaching session(s) to debrief the report and make an action plan</li> <li>• A pulse survey</li> </ul> Our Progress Pulse micro-survey enables a quick check in on key focus areas selected during the initial Multiview Feedback Process	Higher levels of leadership who oversee many direct reports and/or several functional areas, CEOs, and Executives	Every 1-2 years or after 6-12 months in a new role



## PROGRESS PULSE

Ensure leaders keep momentum as they work toward their goals! Our Progress Pulse micro-survey enables a quick check in on key focus areas selected during the initial Multiview Feedback Process. Updated insights from Progress Pulse facilitate continued conversation and help leaders hold themselves accountable to making ongoing adjustments and continued action to enhance their leadership effectiveness.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A micro-survey that enables a quick check in on key focus areas selected during the initial Multi-View Feedback Process.	<ul style="list-style-type: none"> <li>• Brief report of results</li> <li>• An action plan</li> <li>• Coaching session(s) to debrief the report and make an action plan</li> </ul>	Those who have taken the Multi-View Feedback Tool	6-12 months after taking the Multi-View Feedback Tool



## CEO EVALUATION

The ability to objectively review the performance and leadership of the CEO requires a unique and more thorough and extended view to that of other executive leaders. At Energize Leadership, we utilize our Multiview Feedback Tool for 360-degree feedback on the CEO, and we also review several other factors relevant to the success of the CEO.

Additionally, 1-1 interviews are conducted with board members and/or any other appropriate stakeholders related to the success of the business.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A combination of the Energize Leadership Multi-View Feedback Tool alongside interviews with core leaders, board members, and other relevant stakeholders in connection to a review of appropriate indicators of CEO success.	<ul style="list-style-type: none"> <li>• A full report</li> <li>• Trackable data points</li> <li>• Executive Summary</li> <li>• Action Planner</li> <li>• Communication Planner</li> </ul>	Organizations with more than 10 employees	Annual



## WELL-BEING ASSESSMENT

Individual well-being is paramount to productivity and contributes heavily to workplace dynamics. The Well-Being Self-Assessment helps individuals reflect on the three foundational practices that lead to resiliency and well-being and understand the five factors that consistently influence our sense of well-being so they can more easily maintain a high quality of life and contribute positively in the workplace. A semi-customized team or enterprise-wide Well-Being Assessment can also be useful for supporting Well-Being in the workplace.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A self-assessment tool for individuals to reflect on the elements of Well-Being and determine where they can impact their ability to maintain a high quality of life and contribute positively in the workplace. A semi-customized team or enterprise-wide Well-Being Assessment can also be useful for supporting Well-Being in the workplace.	<ul style="list-style-type: none"> <li>• A diagnostic report with insights on where to focus</li> <li>• Trackable data points</li> </ul>	All employees	Annual



## SELF-CARE AUDIT

Self-care is a critical differentiator in happiness, productivity, and overall well-being. Our FREE self-care audit takes a quick review of our 12 elements of self-care for individuals to identify simple activities and adjustments they can make to improve their day-to-day sense of well-being.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
Our FREE self-care audit takes a quick review of our 12 elements of self-care for individuals to identify simple activities and adjustments they can make to improve their day-to-day sense of well-being	An action plan for areas of development focus	All employees	As frequently as needed!



## LEADER EXPERIENCE SURVEY

We have big expectations of those who earn leadership titles, but rarely do we ask them what gets in their way or what would help them. The Leader Survey serves as a leader "needs assessment" to better understand what leaders need to be successful in their role as a leader. Take time to identify what gets in their way and what would help them be more effective so the leaders in your organization can build a strong foundation for everyone to stand on.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A leader "needs assessment" to gain insight about what your leaders need to excel in their role as a "leader"	An insight report with recommended focus areas and trackable data points	All leaders at all levels	Annual



## LEADER NEEDS SURVEY

Leaders make or break your bottom line. Take the time to understand what employees need from the leaders in your organization and build a strategy to ensure your leaders create the high-performing culture that will keep your business strong.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
An employee "needs assessment" to gain insight about what they need from leaders need within the organization	A diagnostic report with insights on where to focus	All employees	Annual



## EMPLOYEE EXPERIENCE SURVEY

Energize Leadership's Employee Experience Survey is a powerful tool that allows you to identify your organization's areas of strength, opportunities for improvement, and the meaningful patterns which reveal how to best engage and empower every member of your organization.

Most importantly, you get a real understanding of what employees are thinking and feeling—the perspectives most instrumental to informing your strategy to fuel momentum. This tool seeks to understand the employee experience so you can focus on making shifts that matter most and provide the most impactful results.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A survey tool for employees to provide insight and feedback on their experience in their role and in the workplace in order to identify activities that will increase productivity and strengthen organizational culture	<ul style="list-style-type: none"> <li>• A full report</li> <li>• Trackable data points</li> <li>• Executive Summary</li> <li>• Action Planner</li> <li>• Communication Planner</li> </ul>	Organizations with more than 10 employees	Annual



## TEAM INSIGHTS ASSESSMENT

Team level interactions have the largest impact on employee experience, individual engagement, and overall productivity in organizations. The Energize Leadership Team Insights Assessment pinpoints core areas of focus to ensure healthy team dynamics and unleash high levels of performance and organizational loyalty.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A survey tool for teams to assess gaps in their internal operations and team culture.	<ul style="list-style-type: none"> <li>• A diagnostic report with insights on where to focus</li> <li>• Trackable data points</li> </ul>	Teams of 5 or more	Annual or 6 months after adding new team members or a new team leader



## ORGANIZATIONAL CULTURE REVIEW

Building an intentional workplace culture takes continuous effort and care. With our culture review, you'll be more knowledgeable about what's working and what's not when it comes to the workplace environment and confidently pinpoint the behaviors, actions, and systems to align with the agreed-upon values and intentions.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
An diagnostic tool for employees to provide insight on the overall culture of the organization and whether the behaviors, actions, and systems are aligned to the agreed-upon values and intentions	<ul style="list-style-type: none"> <li>• A full report</li> <li>• Trackable data points</li> <li>• Executive Summary</li> <li>• Action Planner</li> </ul>	Organizations with 10 or more employees	Annual



## INCLUSIVITY AUDIT

The Inclusivity Audit assesses 11 core areas of the work environment based on employee's experience as well as their expressed values around inclusion practices. A report provides insights on how to best support individuals as they navigate their own contribution to an inclusive environment in addition to team-level and enterprise-wide opportunities to support the development of an inclusive culture.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
An diagnostic tool for employees to provide insight on the culture of diversity and inclusion in the organization and on their team.	<ul style="list-style-type: none"> <li>• A diagnostic report with insights on where to focus</li> <li>• Trackable data points</li> </ul>	Organizations with 30 or more employees	Annual



## CUSTOMER CONNECTIONS AUDIT

Our cutting-edge Customer Connections Audit reviews the extent to which employees are connected to the business/brand offerings and their ability to manage relationships with customers. The report provides insights for organizations to improve employee knowledge and enthusiasm for products and services, increase their ability to serve and meet the needs of customers, and build participation in the innovative evolution of core solutions improving both the customer and employee experience as well as bottom-line results.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
Evaluation tool to understand the employee connection with the brand (products/offerings) and their ability to build & manage relationships with customers	<ul style="list-style-type: none"> <li>• A full report</li> <li>• Trackable data points</li> <li>• Executive Summary</li> <li>• Action Planner</li> </ul>	Organizations with more than 10 employees	Annual



## CUSTOMER EXPERIENCE ASSESSMENT

Customer experience is a critical factor for long-term organizational success and the Energize Leadership Customer Experience Assessment collects customer feedback on various points of service as well as their experience with product and/or services that have been purchased and/or delivered. The intention of the assessment, as well as the insights gained, is to increase the connection between employees and the customer experience so customers and employees are integrated contributors to profitability and business sustainability.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A survey tool for customers to provide insight and feedback on points of service and experience with product/services purchased/delivered	<ul style="list-style-type: none"> <li>• A full report</li> <li>• Trackable data points</li> <li>• Executive Summary</li> <li>• Action Planner</li> </ul>	All organizations	Annual



## PERFORMANCE EVALUATION

The Energize Leadership philosophy on individual performance evaluations focuses more on having performance conversations that are integrated into the work and happen all year long. We know that with more robust focus on performance-related activities throughout the year, performance is naturally more likely to hit the mark. Our approach includes a process for healthy performance conversations as well as an integrated annual evaluation tool to gauge individual effectiveness in his/her role.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
An approach to evaluating individual performance, which includes a process for ongoing performance conversations as well as an integrated annual evaluation tool to gauge individual effectiveness in his/her role	<ul style="list-style-type: none"> <li>• Performance Conversations Guide and Templates</li> <li>• Performance Evaluation Form</li> <li>• Peer Feedback Tool</li> <li>• Goal Planning Tools</li> </ul>	Organizations with 1 or more employees	Annual



## BOARD MEMBER SELF-ASSESSMENT

Our Board Member Self-Assessment provides individual board members an opportunity to reflect on how they are showing up and adding value to their board and more easily gauge whether they are effectively performing their duties as a board member.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A quick-pulse self-evaluation for board members to evaluate whether they are effectively performing their duties as a board member	A paper/pencil-format assessment tool with tips for effective board participation – can also include values/requirements applicable to the organization to align expectations and foster meaningful conversations	Organizations with a board	Annual



## BOARD EFFECTIVENESS REVIEW

We work with CEOs and their boards to ensure they are effectively supporting the goals and activities of the organization. Our Board Effectiveness Review takes a look at the processes, expectations, and effectiveness of the entire board to provide an overview of opportunities for engaging more fluidly and successfully achieving their objectives.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A combination of an online survey of assessment questions alongside interviews with core leaders, board members, and other relevant stakeholders to determine the level of effectiveness of the Board	<ul style="list-style-type: none"> <li>• A full report</li> <li>• Executive Summary</li> <li>• Action Planner</li> <li>• Communication Planner</li> </ul>	Organizations with at least 5 Board members	Annual



## ORGANIZATIONAL HEALTH INDEX

Each Energize Leadership Assessment is designed to provide unique insights that when integrated together provide a total view of the overall health of the organization. The Organizational Health Index is composed of specific assessment metrics that gauge organizational health over time. Businesses that use all of our assessments have an Organizational Health Index and leverage the Organizational Health Dashboard to showcase the metrics that matter most for running a stable business with a strong workplace culture and consistent profitability.

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
Specific assessment metrics from the Energize Leadership suite of assessment tools, that when combined, provide an "Overall Index" to track over time and gauge increases and decreases in the health of the organization	A specific data point called the "Organizational Health Index," plus a breakdown of what it covers	Organizations using Energize Leadership Assessments to track and analyze the internal health of the organization	Reviewed Quarterly/Annually based on the frequency of assessment data collected throughout the year



## ORGANIZATIONAL HEALTH DASHBOARD

The Organizational Health Dashboard showcases hand-selected data points that track and tell the story of the organization's overall health. The dashboard incorporates critical metrics from Energize Leadership's assessment data (including the Organizational Health Index) as well as additional insights that indicate the overall health of the organization (i.e. financials, turnover, etc.).

WHAT IT IS:	WHAT YOU GET:	WHO IT'S FOR:	FREQUENCY:
A dashboard with hand-selected data points that track and tell the story about the organization's overall health, including Energize Leadership assessment data as well as additional insights that matter most (i.e. financials, turnover, etc.)	Summative Dashboard including all of the metrics and data points that tell the story of the overall health of the organization in one snapshot	Organizations using Energize Leadership Assessments to track and analyze the internal health of the organization	Reviewed Quarterly/Annually based on the frequency of assessment data collected throughout the year