

# Testing for Personal Effectiveness Checklist 164



## Introduction

A simple approach to help you to assess your personal effectiveness and identify areas for development is offered here. This checklist is in the form of a simple test, which allows you to assess your personal skills across a wide range of tasks and activities, including teamwork, presentations, stress management, influencing others, planning, relating to others and prioritising of objectives. It should take no more than half an hour to complete.

The test summarises a personal competency framework designed by the European Management Association, formerly CECIOS, the European Management Council, for use in profiling managers' personal skills.\* It can be used to assess your own generic management skills and, if you get others to complete it for you (boss, colleagues, staff, customers, for example,) as a feedback tool.

## Definition

Personal effectiveness is the ability to perform specific, functional tasks together with personal qualities, aptitudes and attitudes. Personal skills may also be called transferable skills, personal competences or personal behaviours.

## Tackling the test

### 1. Select relevant statements

Each of the competences in the boxes has four statements listed beneath it. Look at the statements and decide which is most relevant to your current situation at work.

### 2. Assess your performance

Select the appropriate statement and tick the column that best describes your own perception of your performance in that area.

### 3. Review the results

When you have completed the table, you will be able to review your current level of ability and performance.

### 4. Consider the developmental implications

The statements correspond to levels of management ranging from team leader (the first statement) to senior manager (the fourth statement). If you believe that you perform excellently at a lower level (first and second statements), you perhaps need to identify opportunities to test your skills at a higher level (third and fourth statements). Think about ways of improving areas of weaker performance.

\*Published in Practical self-development: a step by step approach to CPD, Institute of Management, 1997

## 5. Seek feedback from others

The ultimate test must be whether your colleagues, boss or staff share your assessment of your particular skill set, so it is highly desirable to compare your perceptions with those of someone who knows you well. Most managers get surprises when they do this, sometimes because they find that their worries about performance in some areas are ill-founded. This is one form of '360 degree review', which is a key step in understanding your own performance. Further guidance is provided in our checklist on using 360 degree 'feedback'. (See Additional resources below.)

## Reviewing test outcomes

Identifying your personal effectiveness profile may be instructive, but how do you exploit this knowledge? To convert self-knowledge into action and success, you need to do four things:

### 1. Raise your level of awareness

Frequent and regular feedback is the only way to increase your awareness of your personal effectiveness. Look for different sources of feedback - self assessment tools, your colleagues, your boss, your partner and friends, even customers. Find ways of asking them what they think.

### 2. Monitor your performance and impact

If there are key performance indicators that relate directly to your performance, these may give a strong indication of your effectiveness. You will need to analyse these and consider what they tell you about your performance, your effectiveness, your strengths and areas for development.

### 3. Identify your key development needs

Review the match between your current job and career aspirations and key aspects of your personality and behaviour. Taking this into consideration together with what you have learned from analysing feedback and your assessment of your performance against your KPIs will help you to gain a well-rounded picture of your development needs.

### 4. Create realistic action plans

This is the hard part. To change your behaviour and improve performance, you need to: be realistic; set SMART (Specific, Measurable, Achievable, Realistic, Time-scheduled) objectives; expect setbacks; reward yourself when you succeed; and use others to support and guide you. Most importantly, you need to review your progress on a regular basis and to use feedback and KPIs to gauge and steer the impact of your actions.

## Managers should avoid

- being dishonest with themselves when going through the test
- taking too long over the test.

## National Occupational Standards for Management and Leadership

This checklist has relevance to the following standards:

Unit AA1 Manage yourself

Unit AA3 Develop your knowledge, skills and competence.

## Additional resources

### Books

**A managers guide to self development**, Mike Pedler, John Burgoyne and Tom Boydell  
Maidenhead: McGraw Hill, 2013

\*Published in *Practical self-development: a step by step approach to CPD*, Institute of Management, 1997

**Get productive! Boosting your productivity and getting things done**, Magdalena Bak-Maier  
Chichester: Capstone, 2012

**John Adair's 100 greatest ideas for personal success**, John Adair  
Chichester: Capstone, 2011  
This book is also available as an [e-book](#).

**Continuing personal development**, Peter Honey  
Maidenhead: Peter Honey Publications, 2007

**The strengths way: the art of building on strengths**, Mike Pegg  
Cirencester: Management Books 2000, 2007

**Personal development and management skills**, Chris Routledge and Jan Carmichael  
London: Chartered Institute of Personnel and Development, 2007

**Personal effectiveness: a guide to action**, Diana Winstanley  
London: Chartered Institute of Personnel and Development, 2005

This is a selection of books available for loan to members from CMI's library. More information at:  
[www.managers.org.uk/library](http://www.managers.org.uk/library)

### Journal article

**Make yourself indispensable**, John H Zenger, Joseph R Folkman and Scott K Edinger  
Harvard Business Review, Oct vol 89 no 10, 2011, pp 85-90, 92

This article is available for members to download from CMI's library. More information at  
[www.managers.org.uk/library](http://www.managers.org.uk/library)

### Related checklists

Personal development planning (092)  
Using 360 degree feedback (074)  
Emotional intelligence (178)  
Managing your time effectively (016)  
Working out a career plan (061)

**This is one of many checklists available to all CMI members. For more information please contact**

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**Personal Competence Indicator**

Mark x in the appropriate column:	Very Good	Satisfactory	Needs Improvement	Unsatisfactory	Not Relevant
<b>RELATING TO OTHERS</b>					
Treat people even-handedly					
Actively develop team building and interpersonal skills					
Assist other managers to develop team building and interpersonal skills in their team					
Establish good teamwork and interpersonal skills as a key element in the corporate culture					
<b>TEAM WORK</b>					
Contribute to the development of internal teams					
Exploit the strengths and skills of staff in your area					
Develop expertise and teamwork across departments in the company					
Develop the corporate culture for promoting staff development					
<b>PRESENTATION</b>					
Make effective presentations to staff and colleagues					
Make effective presentations to the senior management team					
Use professional presentations to raise the profile of the company					
Promote the company's image and mission through major public presentations					

Mark <b>x</b> in the appropriate column:	Very Good	Satisfactory	Needs Improvement	Unsatisfactory	Not Relevant
<b>ETHICAL PERSPECTIVE</b>					
Comply with statutory and organisational codes of conduct					
Identify potential conflicts between the interests of stakeholders					
Identify and work towards the solution of ethical issues in the company					
Create a company culture with a strong emphasis on business ethics					
<b>PLANNING AND PRIORITISING OBJECTIVES</b>					
Identify objectives to meet operational requirements					
Translate business plans into operational objectives for your team					
Evaluate and integrate the plans of other managers into corporate business plans					
Create the companies mission and set the strategy					
<b>COMMITMENT TO EXCELLENCE</b>					
Consistently seek quality results in your own performance					
Motivate your team to achieve high quality standards					
Motivate other managers to achieve high quality standards in key areas					
Set ambitious, realistic goals for yourself and the rest of the company					

Mark <b>x</b> in the appropriate column:	Very Good	Satisfactory	Needs Improvement	Unsatisfactory	Not Relevant
<b>INFLUENCING OTHERS</b>					
Achieve targets through staff without recourse to inappropriate confrontation					
Secure maximum contributions from staff towards achieving business plans					
Persuade other managers to change their direction and attitudes in key areas					
Gain internal and external support for the company's mission and strategy					
<b>INFORMATION SEARCH</b>					
Collect information to monitor operation performance					
Investigate and take advantage of all possible sources of information related to your area of responsibility					
Forecast major trends in your area of business in the company					
Apply information about the wider business environment to make decisions on future corporate direction					
<b>SELF CONFIDENCE</b>					
Put your ideas into action					
Take action to ensure performance targets for your area are consistently exceeded					
Create new opportunities outside your normal area of responsibility					
Create a feeling of optimism and entrepreneurship within the organisation					

Mark <b>x</b> in the appropriate column:	Very Good	Satisfactory	Needs Improvement	Unsatisfactory	Not Relevant
<b>MANAGING STRESS</b>					
Take advantage of formal processes within the company to reduce stress					
Consult with others to reduce levels of stress within your team					
Reduce the effects of constant pressure through careful planning					
Implement unpopular or stressful plans at company level					
<b>PERSONAL LEARNING AND DEVELOPMENT</b>					
Use feedback to identify development opportunities for improved personal performance					
Actively seek opportunities for self-development in line with company requirements					
Demonstrate an excellent track record for career development supported by comprehensive feedback					
<b>STRATEGIC PERSPECTIVE</b>					
Develop clear plans to achieve results within the context set by others					
Reduce complex issues to practical steps and plan activities which take the endeavour forward					
Relate key activities and decisions to long-term strategic aims					
Create and direct a clearly defined vision of the future within the company					
<b>ANALYSIS</b>					
Apply a practical, accurate approach to operational problems					

Mark <b>x</b> in the appropriate column:	Very Good	Satisfactory	Needs Improvement	Unsatisfactory	Not Relevant
Use detailed analysis to direct the future actions of your staff					
Identify new approaches to implementing plans outside your area of expertise					
Generate ideas and create effective strategic plans at corporate level					
<b>JUDGEMENT</b>					
Use facts to arrive at simple operational decisions					
Use adequate information to support decision making within your area of responsibility					
Use a variety of information and tools to make decisions at a corporate level					
Make consistent decisions on behalf of the whole organisation					
<b>ORGANISATIONAL INFLUENCING</b>					
Use "informal systems" to get things done					
Create your own plans to alter attitudes or activities within the company					
Influence major corporate decisions					
Achieve major changes in the culture and direction of the company					
<b>OTHER</b>					