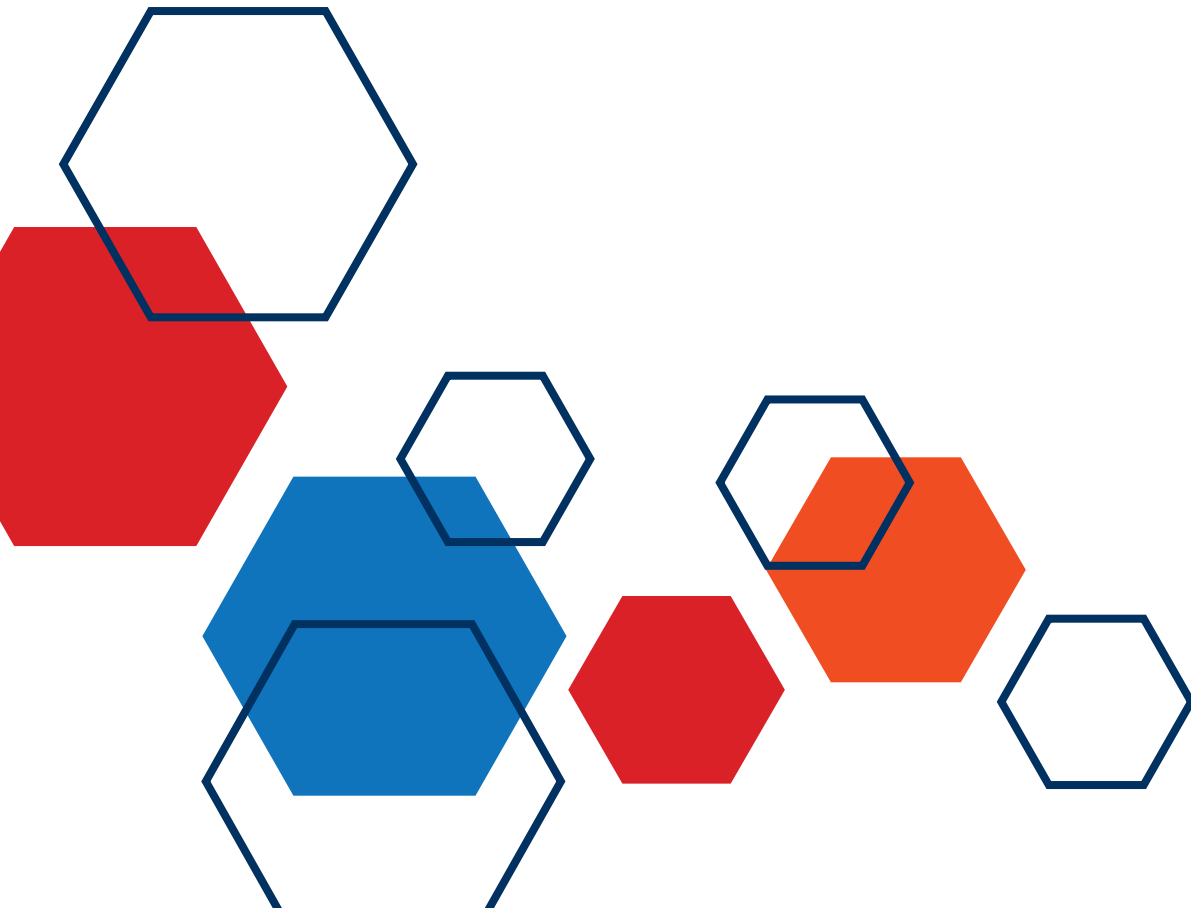


# Thought Leadership

## The Executive Checklist

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# The Executive Checklist

The Executive Checklist establishes best practices in leadership and improves business performance. Using business excellence frameworks, it encourages business leaders to think about next practices (moving beyond current best practices) for competitive advantage. The concept of a checklist is not new, checklists are used in aviation and hospitals to ensure process compliance and to save lives. The Executive Checklist provides a laser focus on critical success factors for any business.

Executives need a checklist because they can often be far too operational and not strategic. Their day-to-day experience can be one of meetings and crisis management. They often lack discipline around leadership and business excellence. They often tolerate poor performing managers and dysfunctional teams. The checklist provides a holistic health assessment of any business.

The Executive Checklist is a roadmap of best practices for achieving leadership and business excellence. It keeps busy executives strategically focused and accountable for improving leadership and business capability, to drive bottom line results. The checklist can be used as an assessment tool by individual managers and management teams to:

- ✓ Assess the strengths and opportunities of the business/business unit
- ✓ Get the difficult issues on the table for discussion
- ✓ Identify gaps in current business practices
- ✓ Identify opportunities for leadership development (assessments, programs or coaching)
- ✓ Sign off on an action plan that could take the business to the next level

Turbulence and disruption are now the new norms for the business world. Winning organisations will be those that can reinvent themselves faster than their competitors. Leading change is a key capability. Leadership, team, and employee engagement are measurable and can be improved. If you add business excellence disciplines, you should be well placed for industry leadership. The Executive Checklist should help many managers to assess their business/business unit and develop an action plan for improvement.

## Scoring

Managers are asked to rate the 50 items based on the current performance of the business/business unit as being low, medium or high. If the amount of greens is significantly higher than the reds, it is likely that you have a high performing business.

LOW

MEDIUM

HIGH

**“ The quality of people’s lives depends on their careers. The quality of people’s careers depends on the organisations in which their careers are embedded. The success of these organisations depends on their leadership. The effectiveness of the leadership depends on the characteristics of the people in leadership roles. Ultimately, then, personality drives leadership, leadership drives organisational performance, and who is in charge matters greatly for the fate of organisations and the people in them.**

- Dr. Robert Hogan



# The Executive Checklist

Managers are asked to rate the 50 items from 1 to 5 for the business, with 1 being: Strongly disagree, 2: Disagree, 3: Neither agree or disagree, 4: Agree and 5: Strongly agree.

<b>STRONGLY DISAGREE</b>	<b>NEITHER AGREE OR DISAGREE</b>	<b>STRONGLY AGREE</b>
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<b>THE EXECUTIVE CHECKLIST</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
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## **LEADERSHIP**

1	Our management team understands that leadership drives engagement, and that engagement drives performance					
2	Our managers have the right balance of working in (operational) and on (strategic) the business					
3	Our managers display strong emotional intelligence through composure and appropriate social behaviour					
4	Our managers show high levels of resilience by consistently demonstrating high energy, motivation and positive thoughts					
5	We use personality and cognitive testing when hiring new managers					
6	Our managers consistently make the right judgement calls on big decisions (strategic, people, marketing and operational)					
7	All managers are measured annually/ bi-annually through 360° reviews, employee surveys or high performing team assessments					
8	All teams are expected to be high performing, and we regularly review their culture and performance					
9	Every year we spend money on targeted leadership programs to develop capability in future leaders					

## **STRATEGY**

10	We have a rolling (three- to five-year) strategic plan supported by a robust one-year plan					
11	We prioritise innovation opportunities with the highest likelihood of a return on investment					
12	We view our business eco system strategically and position ourselves for competitive advantage					
13	Our business plan provides a clear, sustainable vision of what winning looks like					
14	We have a one-page executive summary business plan, used to provide clarity and accountability					
15	All business units/teams have second-tier plans that are aligned with the master business plan					
16	We have a rigorous strategic planning cycle in place					
17	We conduct quarterly reviews of the strategic plan					
18	At these reviews, we spend 50 percent of our time reviewing strategy and 50 percent building a high-performing team					
19	Our structure supports the strategy; we don't have any silos					
20	All teams have KPIs in place, covering areas such as financials, operations, customers and employees					
21	Our execution of business plans is well supported by strong implementation processes					

## PEOPLE

22	Our values are supported by behaviours; our employees know the behaviours we want and don't want					
23	Our one-page plan is used as a communication tool for all employees					
24	We employ robust recruitment practices to hire the right people					
25	We have created an inclusive, psychologically safe environment, for a diverse workforce					
26	Our people strategies are aimed at being an employer of choice					
27	The bottom 10 percent of employees are identified regularly and either improve, or are removed in a timely manner					

## CUSTOMERS

28	We give our customers a high degree of functional value around price, quality and reliability					
29	We give our customers a high level of emotional value around service, communications and trust					
30	We consistently meet or exceed customer's expectations					
31	We listen and act on the voice of the customer using multiple modes					
32	We use social media to listen to customers and to communicate and engage with them					
33	We have effective brand management that improves brand recognition and customer loyalty					

## OPERATIONS

34	We use quality tools (Lean process and Six Sigma) for cost, cycle time and defect reductions					
35	We use quality information, analysis and knowledge management for competitive advantage and productivity growth					
36	Managing cyber security is an essential component of our operational effectiveness					
37	Our supplier networks are strategically focused on fewer and more agile partners					
38	Our technology is up to date and efficient					
39	We have business continuity plans to ensure the continuity of operations in an emergency					
40	Support services are accountable and add significant value to our business					
41	We have a high level of operational capability including speed, responsiveness and flexibility					

## RESULTS

42	Our senior executive team has a great culture and is high performing					
43	We understand the causal link between people and business analytics and use it to drive better business outcomes					
44	We achieve top-quartile results in our employee engagement surveys					
45	Lifelong customer loyalty is our goal, and our high retention rate reflects that effort					
46	We achieve great results for our environmental, legal and regulatory compliance					
47	Our capacity for rapid change and flexibility gives us agility in an ever-changing world					
48	We achieve our service and operational excellence goals					
49	Our key financial and market results show industry leadership					
50	Our revenue and profit performance projections look sound and sustainable					

# Leadership, Engagement, Performance

Leadership behaviour drives strategy, team performance, employee engagement and culture. High performing teams should be a goal in business. Leadership is about results, teams deliver results, so judge the leader by the team.

There needs to be a strong strategic planning cycle, focusing on both the long term and the short term. A one-page summary plan should be used for high level clarity, accountability and communication. Key performance indicators should cascade into second tier teams. A balanced scorecard approach should be taken, which includes a measure of employee engagement.

The focus on strategy and people needs to be connected by understanding that people deliver results and engagement is not an end in itself but the means to delivering superior results.

Investment in leadership assessments, coaching and development programs is growing globally. An emerging trend is looking for return on investment. This can be measured by individual and team performance and ultimately by employee engagement. This is best understood and managed by people analytics. The challenge is being able to connect people data with operational and financial data.

## PBC Offerings

### HOGAN

#### THE SCIENCE OF PERSONALITY

As the ANZ Distributor of Hogan Assessments, PBC is proud to support our clients apply the Hogan range of assessments to address business needs. Hogan uses the powerful science of personality to support organisations to select the right people, develop talented employees, build great leaders, and impact the bottom line.

### TEAMS

#### BUILD BETTER TEAMS

PBC supports team development and success through targeted solutions that focus on building high performing teams; improving the effectiveness of newly formed teams; getting dysfunctional teams back on track; and supporting teams to collaborate across different functional areas.

### 360 AND PERSONALITY DIAGNOSTICS

PBC offers a range of psychometrics tools, multi-rater assessments and surveys to meet your organisation's talent selection, development and engagement needs. Our Consultants ensure our range of diagnostics are supported by practical resources, regularly updated benchmarks and technical guides.

### CONSULTING

Our expertise in leadership, business consulting, people and culture, and analytics provides the necessary foundation to undertake successful business improvement initiatives that deliver real returns on investment for our clients. Our consulting solutions include strategic business planning workshops, leadership programs, team building, talent management and analytics projects through to executive coaching. All our solutions are informed by robust diagnostics and contemporary research.

### RESEARCH & ANALYTICS

#### LEVERAGE DATA FOR BUSINESS INTELLIGENCE

PBC supports our clients to use their people analytics data in a meaningful way. We help our clients understand what data they have access to and how this can be used to answer questions regarding their workforce, how they compare with their competitors, and how they can improve their organisation's performance.

### SELECTION

#### ENSURE THE RIGHT PEOPLE IN THE RIGHT ROLES

PBC is able to leverage over 25 years of experience and research around best practice recruitment in order to identify areas where your current processes can be enhanced. We support our clients to understand capability requirements, and assess against these requirements using a best practice-evidence based approach.

### LEADERSHIP

#### IDENTIFY, DEVELOP AND RETAIN YOUR LEADERS

For over 25 years, PBC has provided leadership solutions including, executive and board selection, leadership development programs, female leadership programs, unconscious bias training and executive coaching. During this time, PBC has worked in partnership with Hogan on a range of research projects on leadership capability, giving us unique insight into what makes a leader successful.

### COACHING

PBC attract and retain a group of highly professional, well-credentialed, experienced coaches, all are experts in the Hogan Assessments, as well as in coaching and consulting at the senior management and executive levels. Combining Hogan Assessments with the Hogan 360 provides a holistic and effective approach to executive coaching.

## **About Peter Berry Consultancy (PBC)**

PBC is a multidisciplinary global consulting firm with 30 years' experience in the delivery of solutions aimed at maximising the potential of individuals, teams, leaders and organisations. We undertake research to support our evidence-based solutions and have a network of partners and distributors globally.

PBC is the Australian and New Zealand distributor of Hogan Assessments and the authors of a range of diagnostics including the Hogan 360 suite, Agile suite, High Performing Team Assessment (HPTA), and co-authored the Hogan Safety Climate Survey.

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