

CPI 260[®] Forum, Part II

Reviewing the Coaching Report for Leaders and Your Questions Answered

October 16, 2013

Presented by Robert Devine



Our Speaker—Robert Devine

- Senior consultant focusing on management effectiveness training, team building, career evaluation and management, and executive selection
- Author of the CPI 260® Certification Program and the *CPI 260® Client Feedback Report Guide for Interpretation*; also participant assessments, computer/Web-based reports, facilitation guides
- CPI 260® Certification Trainer
- MA in industrial & organizational behavior, Golden Gate University
- BA in sociology & psychology, University of Toronto



CPI 260® Forum, Part II: Agenda

- CPI 260 Definition and Purpose
- Brief Overview of the CPI 260 Assessment and Scales
- Coaching Report for Leaders (CRL) Refresher
- Differences Between the CFR and CRL
- The CRL Snapshot Page
- Using the CRL Worksheet
- CRL Interpretive Text for John Sample
- Using the CFR and CRL Together
- FAQs

Review: CPI 260® Definition and Purpose



- 260-item, empirically derived personality instrument
- Describes you as though you were being characterized by knowledgeable and objective others
- Concerns itself with “normal” characteristics that are recognizable to all and that matter
- Adds to what is known about you
- Allows fair comparisons to others
- Produces results on 29 scales

Client Feedback Report, Page 4

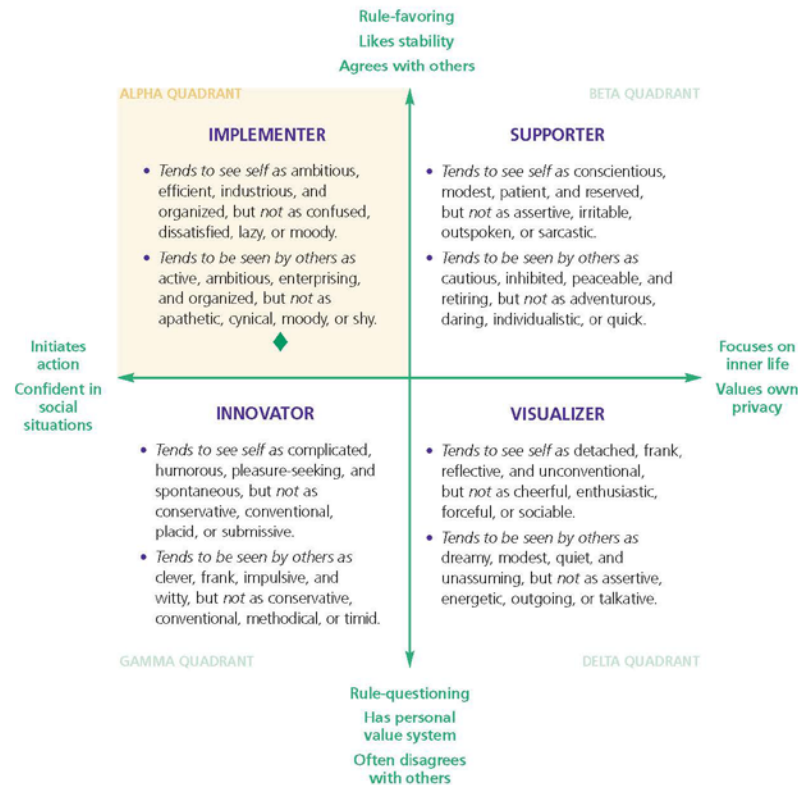


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CLIENT FEEDBACK REPORT FOR JOHN

LIFESTYLE DIAGRAM

The following diagram gives specific information as to how persons in each lifestyle see themselves and as to how they are viewed by others. The diagram also shows how the interpersonal and norm-favoring orientations are combined to define the four ways of living. Your answers to the instrument place you in the Alpha quadrant, where the basic lifestyle is that of the *Implementer*. The plotting of your lifestyle score is shown by the diamond in that quadrant.



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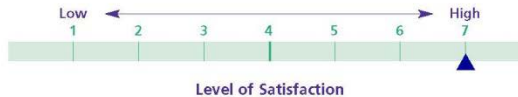
YOUR LIFESTYLE

Implementers believe strongly in teamwork and try hard to achieve the goals set by the groups to which they belong. They are usually industrious, efficient, and self-disciplined.

When functioning at their best, they are ambitious, enterprising, task-focused, and well-accepted as leaders. When under stress or functioning poorly, *Implementers* can be opportunistic, bossy, and overly critical of those who fail to follow the rules.

LEVEL OF SATISFACTION

The third basic theme of this instrument pertains to one's sense of satisfaction in living and feelings of self-realization or fulfillment. Those who rank low on this measure tend to be dissatisfied with their current status and feel that their potentialities are not being fulfilled or realized. Those who score high tend to feel that they are living up to their own potentialities and also that they can cope effectively with the demands of living. Your score on this dimension is indicated by the blue triangle on the line below.



This score suggests that you feel good about the way your life is going and are comfortable in your lifestyle.

The information above gives an overview of your way of living and of broad, general trends in your personal style. In the next section, more detailed and specific information will be presented.

DETAILED RESULTS

In this section, your scores on 26 separate measures are reported, grouped into five broad categories:

1. Dealing with others
2. Self-management
3. Motivations and thinking style
4. Personal characteristics
5. Work-related measures

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CPI 260® Managerial Styles



Implementer Managers

Value	<ul style="list-style-type: none"> • Accountability • Goal clarity • Big-picture issues
Support	<ul style="list-style-type: none"> • Organizational norms • People who take charge • People who support their goals
Want	<ul style="list-style-type: none"> • Influence and impact • Important roles • Themselves and others to be the best
Display	<ul style="list-style-type: none"> • Confidence • Task orientation • Commitment
Make Mistakes By	<ul style="list-style-type: none"> • Ignoring creative and unusual ideas • Pushing too hard • Being overly competitive

Innovator Managers

Value	<ul style="list-style-type: none"> • Creativity and new ideas • Ways to beat the system • Freedom from organizational constraints
Support	<ul style="list-style-type: none"> • New initiatives and first-time efforts • People who take risks • People who challenge their thinking
Want	<ul style="list-style-type: none"> • A role as a change agent • Freedom from supervision • Support in handling follow-through
Display	<ul style="list-style-type: none"> • Enthusiasm • Independence • Flair
Make Mistakes By	<ul style="list-style-type: none"> • Neglecting to monitor and demand accountability • Glossing over details • Downplaying the value of stability

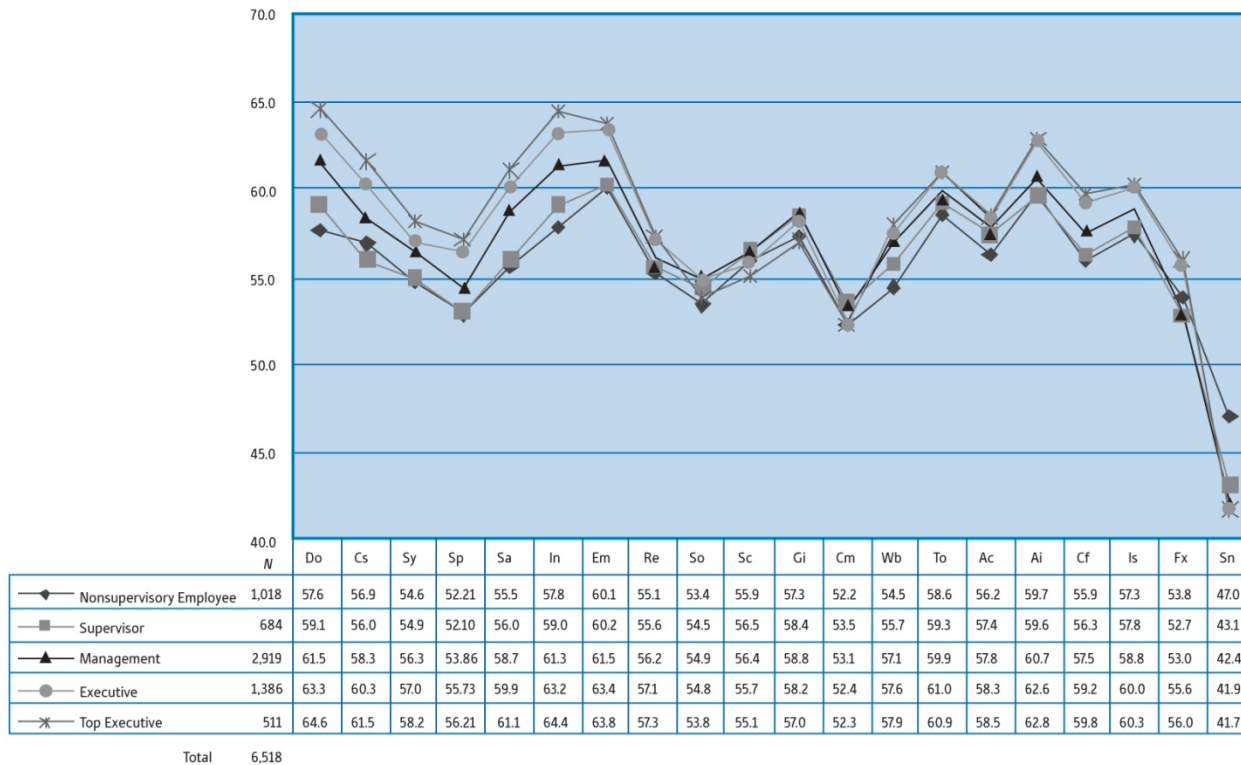
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Step 3: Normative Interpretation



Mean Scale Results by Organizational Level

CPI™ Mean Scale Results by Organizational Level:
Dealing with Others, Self-management, Motivations and
Thinking Style, Personal Characteristics



Source: CPI 260™ Client Feedback Report Guide for Interpretation, CPP, Inc.

Client Feedback Report, Page 6

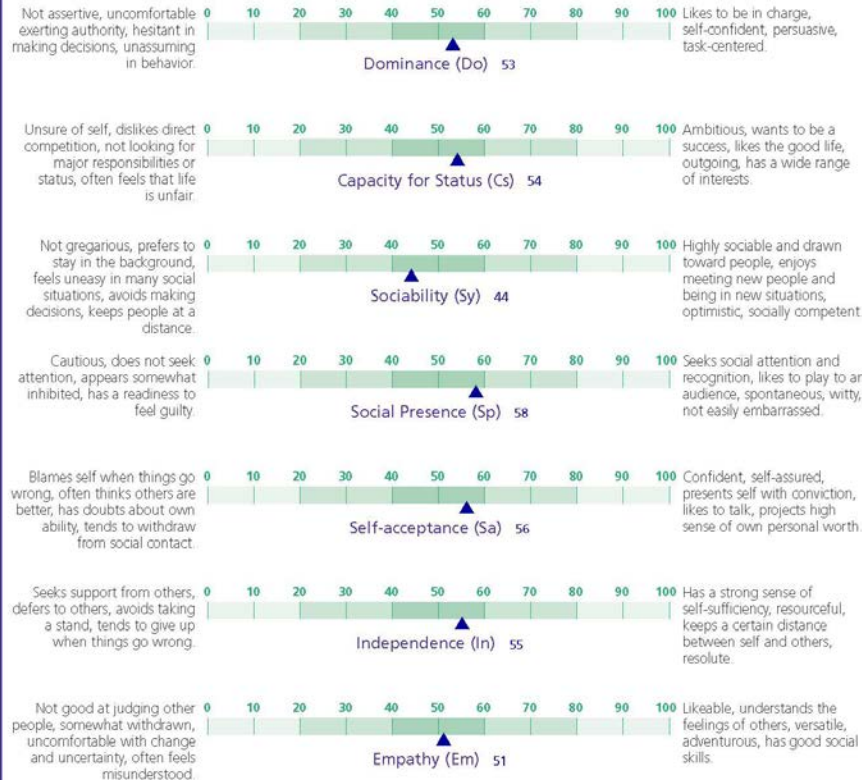


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CLIENT FEEDBACK REPORT FOR JOHN

Scores are reported in standardized form, based on a norm sample of 6,000 persons (3,000 men, 3,000 women). For each scale, 50 is the norm-based midpoint. The lower the score, the more relevant the comments to the left of the graph will be; the higher the score, the more relevant those to the right of the graph will be.

DEALING WITH OTHERS



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Client Feedback Report, Page 6 (marked up)

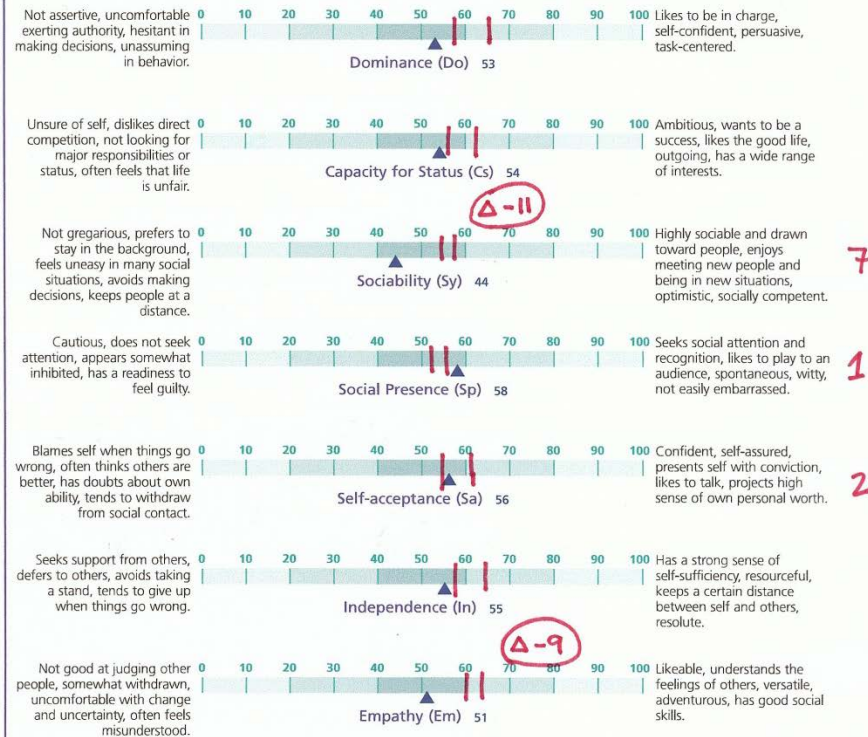


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CLIENT FEEDBACK REPORT FOR JOHN *Sample*

Scores are reported in standardized form, based on a norm sample of 6,000 persons (3,000 men, 3,000 women). For each scale, 50 is the norm-based midpoint. The lower the score, the more relevant the comments to the left of the graph will be; the higher the score, the more relevant those to the right of the graph will be.

DEALING WITH OTHERS



I_S = 52

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Proposed CFR Strengths for John



1. Working with People

Can engage others when required, and be spontaneous, but more often than not...

- ✓ Is low-key, deliberate, and cautious in how he relates to others
- ✓ Keeps some distance between self and others, is hard to get to know, and is independent and individualistic

Proposed CFR Strengths for John (continued)



2. Working with Projects

Likes clear objectives and expected outcomes but...

- ✓ Marches to the beat of his own drum
- ✓ Does not like to be micromanaged
- ✓ In a supervisory role, extends this “freedom from micromanagement” to his associates, even when he should not

3. Perspectives on Leading

Willing to take on some leadership responsibility for getting things done, but...

- ✓ Is independent-minded and individualistic
- ✓ Places own perspectives and values ahead of mandates of the broader culture
- ✓ When he agrees with them, will align behind the objectives of the organization but in his own, unique way

Proposed CFR Strengths for John (continued)



4. Openness to Change

- ✓ Can work in structured situations and adhere to policy and procedure but also wants a good measure of personal freedom to put his own stamp on things
- ✓ Is reasonably flexible and adaptable, without necessarily being a source of creativity and innovation
- ✓ Will show strong achievement drive—wanting to “get it done”

Proposed CFR Developmental Opportunities



1. Be more attentive to people

- ✓ Can appear aloof and distant to others
- ✓ Can be inconsistent in letting empathy, consideration, and understanding for associates and colleagues show through
- ✓ Needs to become more of a student of people, pay more attention to them, and try to understand their motivations, drives, and what makes them tick
- ✓ Attending to this will enable him to be more persuasive in selling his ideas, in developing people, in building team spirit, and in getting others behind his initiatives and ideas

Proposed Developmental Opportunities (continued)



2. Be more constructively assertive

- ✓ Needs to seek ways to increase the vigor and/or volume of his involvement and the conviction with which he expresses his ideas
- ✓ Needs to become more comfortable with asserting and defending his arguments and views
- ✓ Needs to proactively and constructively deal with the conflict that naturally ensues

CPI 260® Coaching Report for Leaders



CPI 260™ COACHING REPORT for LEADERS

BY SAM MANOOGIAN

IN CONSULTATION WITH
HARRISON GOUGH • ROBERT DEVINE • DAVID DONNAY



Report prepared for

John Sample
December 03, 2012



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Snapshot of John's Leadership Characteristics



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SNAPSHOT OF YOUR LEADERSHIP CHARACTERISTICS

YOUR LEADERSHIP CHARACTERISTICS	 CONSIDER THESE YOUR STRENGTHS	 EXAMINE THESE POTENTIAL DEVELOPMENTAL OPPORTUNITIES	 ASSESS WHETHER THESE BEHAVIORS WORK TO YOUR ADVANTAGE
SELF-MANAGEMENT			
1. Self-Awareness		■	
2. Self-Control	■		
3. Resilience		■	
ORGANIZATIONAL CAPABILITIES			
4. Use of Power and Authority		■	
5. Comfort with Organizational Structures			■
6. Responsibility and Accountability	■		
7. Decisiveness		■	
TEAM BUILDING AND TEAMWORK			
8. Interpersonal Skill			■
9. Understanding Others		■	
10. Capacity for Collaboration	■		
11. Working with and Through Others		■	
PROBLEM SOLVING			
12. Creativity	■		
13. Handling Sensitive Problems		■	
14. Action Orientation			■
SUSTAINING THE VISION			
15. Self-Confidence		■	
16. Managing Change	■		
17. Influence		■	
18. Comfort with Visibility	■		




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Snapshot of John's Strengths



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2. Self-Control	■		
3. Resilience		■	
ORGANIZATIONAL CAPABILITIES			
4. Use of Power and Authority		■	
5. Comfort with Organizational Structures			■
6. Responsibility and Accountability	■		
7. Decisiveness		■	
TEAM BUILDING AND TEAMWORK			
8. Interpersonal Skill			■
9. Understanding Others		■	
10. Capacity for Collaboration	■		
11. Working with and Through Others		■	
PROBLEM SOLVING			
12. Creativity	■		
13. Handling Sensitive Problems		■	
14. Action Orientation			■
SUSTAINING THE VISION			
15. Self-Confidence		■	
16. Managing Change	■		
17. Influence		■	
18. Comfort with Visibility	■		


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Snapshot of John's Developmental Opportunities



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SNAPSHOT OF YOUR LEADERSHIP CHARACTERISTICS

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1. Self-Awareness		■	
2. Self-Control	■		
3. Resilience		■	
ORGANIZATIONAL CAPABILITIES			
4. Use of Power and Authority		■	
5. Comfort with Organizational Structures			■
6. Responsibility and Accountability	■		
7. Decisiveness		■	
TEAM BUILDING AND TEAMWORK			
8. Interpersonal Skill			■
9. Understanding Others		■	
10. Capacity for Collaboration	■		
11. Working with and Through Others		■	
PROBLEM SOLVING			
12. Creativity	■		
13. Handling Sensitive Problems		■	
14. Action Orientation			■
SUSTAINING THE VISION			
15. Self-Confidence		■	
16. Managing Change	■		
17. Influence		■	
18. Comfort with Visibility	■		

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Snapshot of John's "You Decide"



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SNAPSHOT OF YOUR LEADERSHIP CHARACTERISTICS

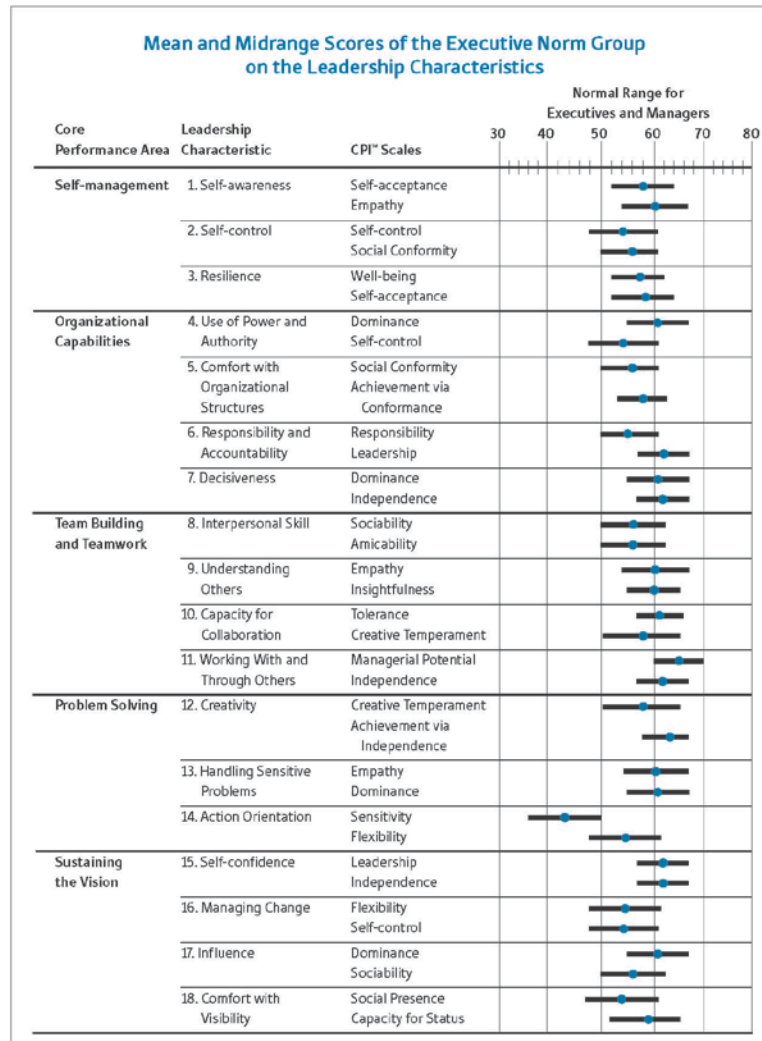
YOUR LEADERSHIP CHARACTERISTICS	CONSIDER THESE YOUR STRENGTHS	EXAMINE THESE POTENTIAL DEVELOPMENTAL OPPORTUNITIES	ASSESS WHETHER THESE BEHAVIORS WORK TO YOUR ADVANTAGE
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ORGANIZATIONAL CAPABILITIES			
4. Use of Power and Authority		■	
5. Comfort with Organizational Structures			■
6. Responsibility and Accountability	■		
7. Decisiveness		■	
TEAM BUILDING AND TEAMWORK			
8. Interpersonal Skill			■
9. Understanding Others		■	
10. Capacity for Collaboration	■		
11. Working with and Through Others		■	
PROBLEM SOLVING			
12. Creativity	■		
13. Handling Sensitive Problems		■	
14. Action Orientation			■
SUSTAINING THE VISION			
15. Self-Confidence		■	
16. Managing Change	■		
17. Influence		■	
18. Comfort with Visibility	■		

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Coaching Report for Leaders Worksheet



CPI 260® Certification Program Coaching Report for Leaders Worksheet



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Comparing the CPI 260® Reports



CFR

- **Profile** report (provides scale scores, some descriptive information)
- General population, norms ($N = 6,000$)
- Scales and T-scores
- Precision

CRL

- **Narrative** report (no explicit scale scores or names)
- General population, plus $N = 5,610$ on-track managers and executives
- Uses a coach's voice
- Big-picture view; provokes discussion by running ideas up the flagpole

Coaching Report for Leaders (marked up): John's Strengths



John's Strengths:

CPI 260° Certification Program Coaching Report for Leaders Worksheet

Mean and Midrange Scores of the Executive Norm Group on the Leadership Characteristics

Core Performance Area	Leadership Characteristic	CPI™ Scales	Normal Range for Executives and Managers
Self-management	1. Self-awareness	Self-acceptance Empathy	[50-60]
	2. Self-control	Self-control Social Conformity	[50-60]
	3. Resilience	Well-being Self-acceptance	[50-60]
Organizational Capabilities	4. Use of Power and Authority	Dominance Self-control	[50-60]
	5. Comfort with Organizational Structures	Social Conformity Achievement via Conformance	[50-60]
	6. Responsibility and Accountability	Responsibility Leadership	[50-60]
	7. Decisiveness	Dominance Independence	[50-60]
Team Building and Teamwork	8. Interpersonal Skill	Sociability Amicability	[50-60]
	9. Understanding Others	Empathy Insightfulness	[50-60]
	10. Capacity for Collaboration	Tolerance Creative Temperament	[50-60]
	11. Working With and Through Others	Managerial Potential Independence	[50-60]
Problem Solving	12. Creativity	Creative Temperament Achievement via Independence	[50-60]
	13. Handling Sensitive Problems	Empathy Dominance	[50-60]
	14. Action Orientation	Sensitivity Flexibility	[50-60]
Sustaining the Vision	15. Self-confidence	Leadership Independence	[50-60]
	16. Managing Change	Flexibility Self-control	[50-60]
	17. Influence	Dominance Sociability	[50-60]
	18. Comfort with Visibility	Social Presence Capacity for Status	[50-60]

Report Part

appropriate emotions

accepts responsibility

open to input

offers, supports innovation

comfortable with new approaches

executive poise, ambition

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Coaching Report for Leaders (marked up): John's Developmental Opportunities



John's Developmental Opportunities...

CPI 260® Certification Program Coaching Report for Leaders Worksheet

Mean and Midrange Scores of the Executive Norm Group on the Leadership Characteristics

Core Performance Area	Leadership Characteristic	CPI™ Scales	Normal Range for Executives and Managers
Self-management	1. Self-awareness	Self-acceptance Empathy	40-60
	2. Self-control	Self-control Social Conformity	40-60
	3. Resilience	Well-being Self-acceptance	40-60
Organizational Capabilities	4. Use of Power and Authority	Dominance Self-control	40-60
	5. Comfort with Organizational Structures	Social Conformity Achievement via Conformance	40-60
	6. Responsibility and Accountability	Responsibility Leadership	40-60
	7. Decisiveness	Dominance Independence	40-60
Team Building and Teamwork	8. Interpersonal Skill	Sociability Amicability	40-60
	9. Understanding Others	Empathy Insightfulness	40-60
	10. Capacity for Collaboration	Tolerance Creative Temperament	40-60
Problem Solving	11. Working With and Through Others	Managerial Potential Independence	40-60
	12. Creativity	Creative Temperament Achievement via Independence	40-60
Sustaining the Vision	13. Handling Sensitive Problems	Empathy Dominance	40-60
	14. Action Orientation	Sensitivity Flexibility	40-60
Sustaining the Vision	15. Self-confidence	Leadership Independence	40-60
	16. Managing Change	Flexibility Self-control	40-60
	17. Influence	Dominance Sociability	40-60
	18. Comfort with Visibility	Social Presence Capacity for Status	40-60

Self-accepting but less responsive

issues draining your energy?

less assertive, seek authority

less decisive?

more task than people oriented

prefer individual contributor role.

less willing to confront issues

quiet confidence; lead by e.g.

less persuasive; SME?

Report Range

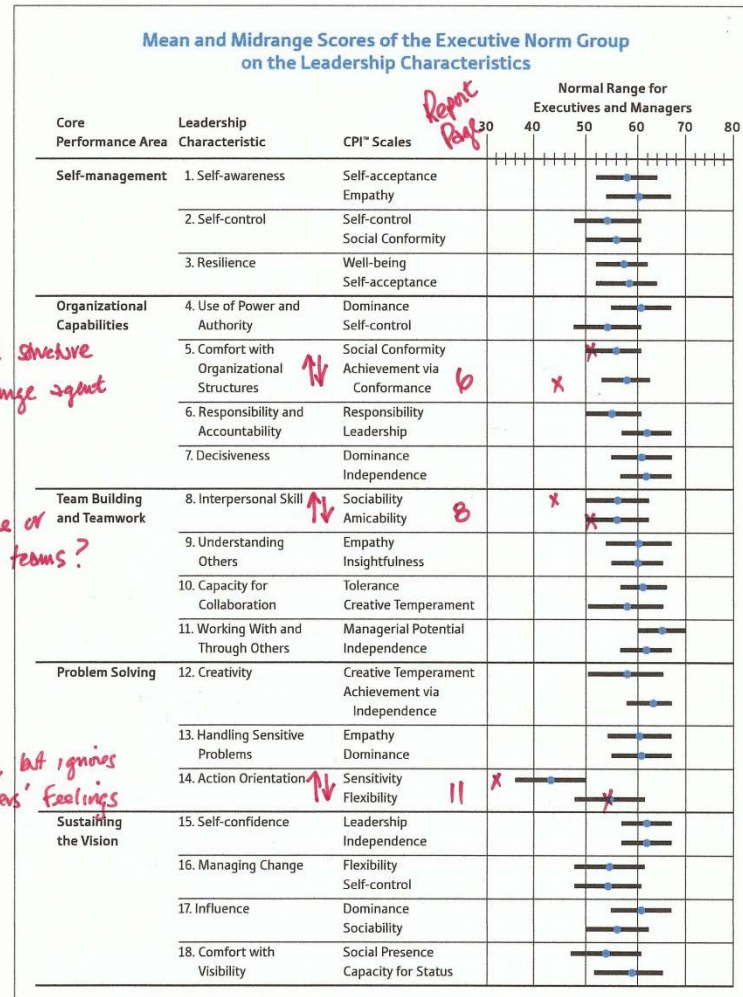
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Coaching Report for Leaders (marked up): John's "You Decide"

John's 'You Decide'

CPI 260® Certification Program Coaching Report for Leaders Worksheet



prefer loose structure
can be change agent

work best alone or
prefer small teams?

strong action, but ignores
criticism, others' feelings
impatient

Report Page 30

x

x

x

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4

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5

3
5

Coaching Report for Leaders: Leadership Characteristics



8

YOUR LEADERSHIP CHARACTERISTICS

TEAM BUILDING AND TEAMWORK

Whether leading a project team or sharing leadership with others on an executive team, today's managers and executives must possess the people skills needed to forge united, smoothly functioning, goal-oriented teams made up of people with disparate skills, motivations, and personalities.



8. INTERPERSONAL SKILL

In their interactions with team members, effective leaders listen attentively, send clear signals, and convey openness, friendliness, and cooperation. They are approachable, in spite of the formal or informal authority that goes with a management position. See also *17. Influence*.

- Others probably experience you as friendly and approachable, but, unlike most other executives and managers, you may not proactively engage in social interaction with others. You may be more comfortable working alone or with a small number of coworkers than on teams.
- You may dislike the fact that many leadership roles place you at the center of attention and require public speaking and interacting with large numbers of people.
- **SUGGESTED ACTION STEP:** Work to establish an early and consistent "voice" at the table of any ongoing group meeting in which you participate by offering your views, even when you are in agreement with the ideas or suggestions of others, and look for opportunities to state your unique perspective or viewpoint.



9. UNDERSTANDING OTHERS

Strong team leaders have a cognitive understanding of personality differences, individual behavior, interpersonal dynamics, and group process, as well as an ability to empathize with others—to understand their feelings and subjective reactions on an intuitive level. See also *1. Self-Awareness*.

- You may be less likely than other executives and managers to be described by team members or colleagues as compassionate, considerate, and caring.
- You may experience stress or discomfort in work environments that involve a team mentality, interpersonal closeness, or a heavy reliance on interdependence.
- Others likely experience you as more task oriented than people oriented. You may not be interested in or able to easily grasp interpersonal dynamics.
- **SUGGESTED ACTION STEP:** Consider participating in a leadership development course or program targeted at increasing your interpersonal sensitivity, awareness, and understanding. Evaluate whether you are more satisfied as an individual contributor than in a management role.

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Proposed CFR/CRL Strengths for John



1. Working with People

Can engage others when required and be spontaneous, but more often than not...

- ✓ Is low-key, deliberate, and cautious in how he relates to others
- ✓ Keeps some distance between self and others, is hard to get to know, and is independent and individualistic
- ✓ Works best alone and/or with small groups of professionals whom he knows well
- ✓ Needs to guard against being perceived as aloof and as keeping information to himself

Proposed CFR/CRL Strengths for John (continued)



2. Working with Projects

Likes clear objectives and expected outcomes but...

- ✓ **Wants to find his own path for getting results**
- ✓ Marches to the beat of his own drum
- ✓ Does not like to be micromanaged
- ✓ In a supervisory role, extends this “freedom from micromanagement” to his associates, even when he should not

Proposed CFR/CRL Strengths for John (continued)



3. Perspectives on Leading

Willing to take on some leadership responsibility for getting things done, but...

- ✓ Is independent-minded and individualistic
- ✓ Places own perspectives and values ahead of mandates of the broader culture
- ✓ When he agrees with them, will align behind the objectives of the organization but in his own, unique way
- ✓ Will use his subject matter expertise to exert authority and get people to agree, more so than assertiveness, social persuasion, or forcefulness
- ✓ Prefers that staff self-manage and solve their own issues

Proposed CFR/CRL Strengths for John (continued)



4. Openness to Change

- ✓ Can work in structured situations and adhere to policy and procedure but also wants a good measure of personal freedom to put his own stamp on things
- ✓ Reasonably flexible and adaptable, without necessarily being a source of creativity and innovation
- ✓ Will show strong achievement drive—wanting to “get it done”
- ✓ Is comfortable with change and remains open to new ideas and alternate ways to get things done

Proposed CFR/CRL Developmental Opportunities for John



1. Be more attentive to people

- ✓ Can appear aloof and distant to others
- ✓ Can seem to be more task- than people-focused
- ✓ Can be inconsistent in letting empathy, consideration, and understanding for associates and colleagues show through
- ✓ Needs to become more of a student of people, pay more attention to them, and get involved with them to explain his thinking and try to understand their motivations, drives, and what makes them tick
- ✓ Attending to this will enable him to be more persuasive in selling his ideas, in developing people, in building team spirit, and in getting others behind his initiatives and ideas

Proposed CFR/CRL Developmental Opportunities for John (continued)



2. Be more constructively assertive

- ✓ Needs to seek ways to increase the vigor and/or volume of his involvement and the conviction with which he expresses his ideas
- ✓ Needs to become more comfortable with asserting and defending his arguments and views
- ✓ Needs to proactively and constructively deal with the conflict that naturally ensues
- ✓ Attending to this will enable him to enhance this influence and authority and get his voice heard, especially with his more forceful or skeptical colleagues

FAQs

You Asked ...



- My client has all strengths indicated on her CRL. How to handle this?
- My client has no strengths indicated on his CRL. How to handle this?
- Does the CPI 260 assessment show anything specifically related to EQ, and also Critical Thinking?
- And more FAQs from you...

Clients with Mostly Strengths



- Clients with all 18 Leadership Characteristics identified as strengths may doubt the validity of the report
- Scan the report for action steps, even for characteristics identified as strengths (i.e., overdone characteristics?)
- Scan the CFR for largest differences relative to appropriate norms
- Look to other, non-test criteria (360 results, performance reviews) for possible suggestions

You Asked ...



- My client has all strengths indicated on her CRL. How to handle this?
- My client has no strengths indicated on his CRL. How to handle this?
- Does the CPI 260 assessment show anything specifically related to EQ, and also Critical Thinking?
- And more FAQs from you...

Clients with No Strengths



- Clients with all 18 Leadership Characteristics identified as developmental opportunities usually acknowledge challenges in their work
- Look for repeated-use scales (such as Do, In, Em, Sc) that could be exacerbating the negative results
- Use CFR scores to see largest differences relative to executive norms
- Help client prioritize, identify pivotal developmental opportunities

You Asked ...



- My client has all strengths indicated on her CRL. How to handle this?
- My client has no strengths indicated on his CRL. How to handle this?
- **Does the CPI 260 assessment show anything specifically related to EQ, and also Critical Thinking?**
- And more FAQs from you...

According to Goleman (1998)



EQ is about...

- Self-awareness
- Self-regulation
- Empathy
- Social skill
- Motivation

CPI 260 indicative scales...

- Self-acceptance (Sa), Empathy (Em), Sensitivity (Sn), v.1
- Responsibility (Re), Social Conformity (So), Self-control (Sc), Independence (In), Flexibility (Fx)
- Em, Insightfulness (Is), Tolerance (To), Sn
- Dealing with Others, In, Good Impression (Gi), Fx, Sn, Managerial Potential (Mp), Amicability (Ami)
- Dominance (Do), Achievement via Conformance (Ac), Achievement via Independence (Ai)

Source: *Working with Emotional Intelligence*, Daniel Goleman, 1998, Bantam Books

You Asked ...



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- Does the CPI 260 assessment show anything specifically related to EQ, and also Critical Thinking?
- And more FAQs from you...

Problem Solving, Decision Making, Critical Thinking



Facets

- Caution vs. impulse, speed
- Involving others vs. standing apart
- Flexibility vs. rigidity
- Creativity
- Pure Critical Thinking

CPI 260 indicative scales...

- Do, In, Sp, Ac, Ai
- To, Fx, In, Gi, Ac < Ai
- Fx, Cf, To, Re
- Sa, Ai, Fx, Ct
- WGCTA (from Pearson)

You Asked ...

- My client has all strengths indicated on her CRL. How to handle this?
- My client has no strengths indicated on his CRL. How to handle this?
- Does the CPI 260 assessment show anything specifically related to EQ, and also Critical Thinking?
- **And more FAQs from you...**

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