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The Productive Leader

Releasing time to lead™

Personal Effectiveness Questionnaire (PEQ)

Guide for Project Managers and Facilitators

Introduction

- The Personal Effectiveness Questionnaire (PEQ) is a central component of The Productive Leader.
- It is designed as a self-assessment questionnaire for leaders and PAs to complete in advance of the Leadership Team Coaching session.
- The PEQ is designed as a tool to provide leaders and PAs with a sense of where their strengths and opportunities for improvement are in relation to the key themes of the programme.
- The results from the questionnaires provide information about team working practices and individual working practices now and as the programme progresses.

PEQ documents you will need access to

There are three spreadsheets which you need to complete the process:

•**Questionnaire_Leader** – this is the version of the questionnaire you will be sending to leaders to complete

•**Questionnaire_PA** – this is the version of the questionnaire you will be sending to PAs to complete

•**Questionnaire_Database** – this is the document you will use to collate the results and collate the two team profiles (PA team and leader team)

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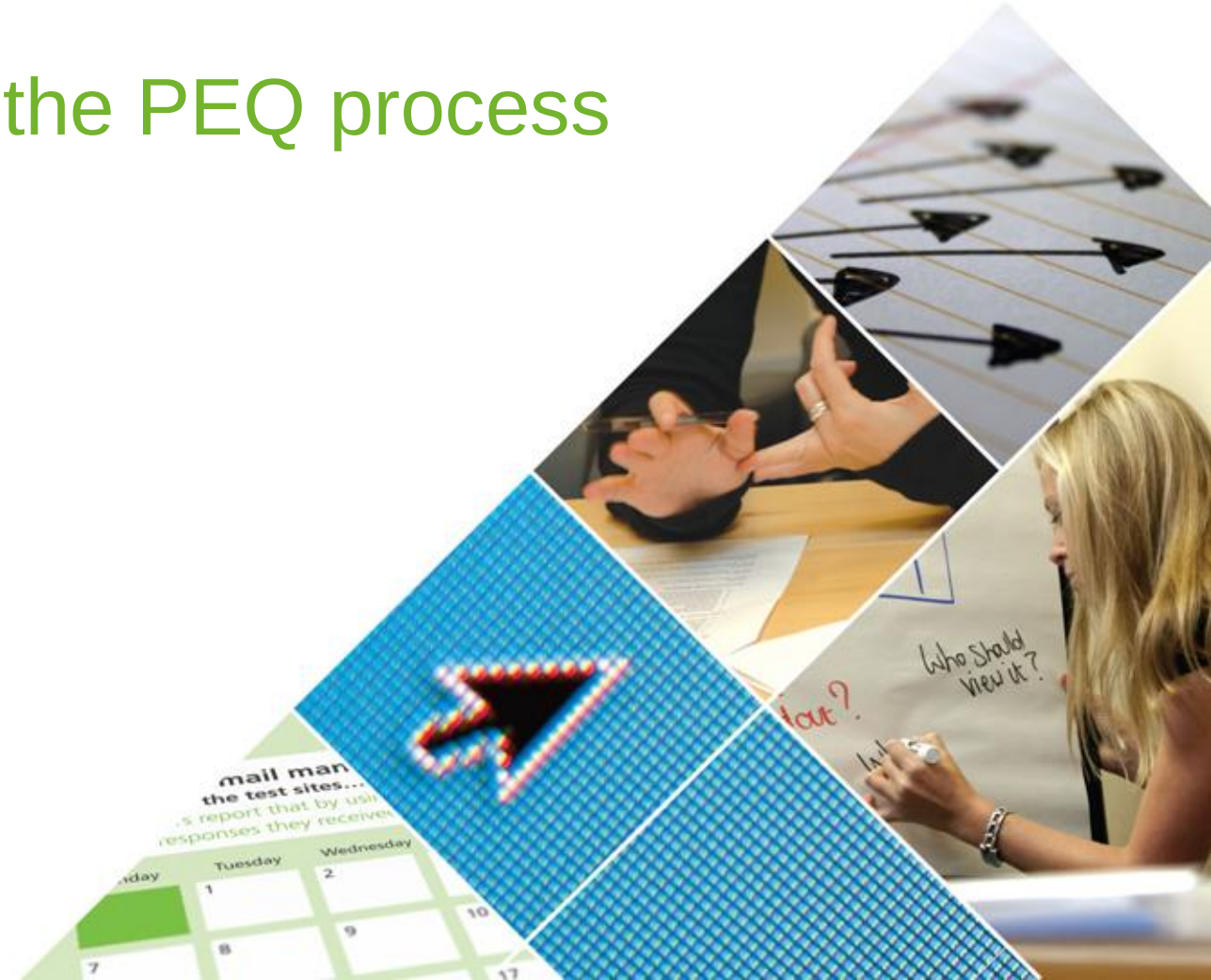
Overview of the PEQ process



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The Personal Effectiveness Questionnaire process

1. Project Manager or Facilitator opens the leader and PA questionnaires
2. Inserts their email address into the second page of the leader and PA questionnaires (entitled 'your details')
3. Emails out the questionnaires to the relevant participants providing the appropriate deadline
4. Leaders and PAs complete questionnaires and view/save their individual results
5. Leader and PA results are sent back via email to the Project Manager/ Facilitator
6. Project Manager/ Facilitator copies and pastes results from the individual spreadsheets into the database
7. Project Manager/ Facilitator prints out the team profile for PAs and leaders for the Leadership Team Coaching session
8. Team profile is shared with the programme participants at the Leadership Team Coaching session
9. Project Manager/ Facilitator can use team profile charts for the email and meetings management sessions
10. Process can be repeated at a later date to see if improvements have been made

- Project Manager/Facilitator activities
- Participant activities

The PEQ is one of the first activities for participants in the programme

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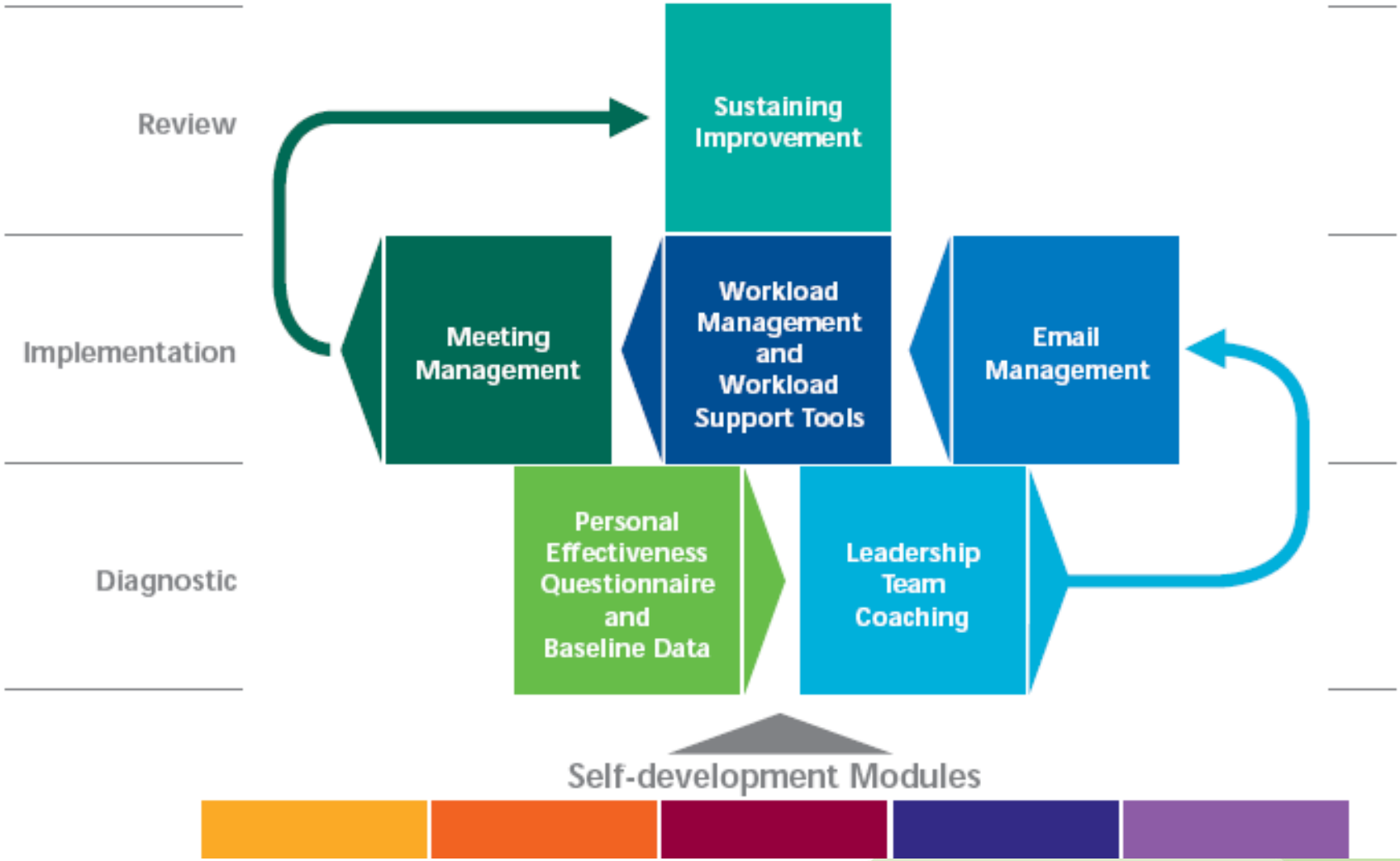

How often should the PEQ be completed?

- The Personal Effectiveness Questionnaires should be completed prior to the Leadership Team Coaching session.
- The questionnaire can then be completed at a later stage in the programme as a means of measuring ongoing progress.

How will the results be used?

- Results will be confidential unless the leadership team wish to share them with their peers.
- Individual profiles will provide participants with information about aspects of the programme that are more relevant to them. Therefore allowing the individual to gain the maximum benefits from the programme.
- As a Project Manager/Facilitator you can direct participants to the Self-development modules which can support their development in a specific area.
- The collated profiles for the teams (PA team and leader team) will be used in the modules to focus the discussion on opportunities for team improvements and also areas of strength for the team.

What will the team profiles show?

- You will generate two team profiles – one for PAs and one for leaders. As the questionnaires are different, they are not directly comparable.

- Team profiles are usually shared with participants at the Leadership Team Coaching session but you may wish to circulate them in advance of the session to allow time for people to reflect on them.

- In the session, team profiles will give participants the opportunity to reflect and discuss what their key opportunities for improvement might be and what action/support is required to move forward.

- The potential use of the team profiles will depend on the leadership team's working style e.g. some teams may choose to leverage individual capabilities for coaching where scores are higher.

Some reflections on using the PEQ results in the facilitated sessions

- Although leaders often work in a team, PAs may not see themselves as a team, so you may want to introduce this idea to them or encourage them to think of themselves as a peer group.
- What can participants learn from each other already in terms of practices and processes which can increase team communication and capacity?
- What support can they give to each other as peers to become even more effective as a leadership team?
- It is worth having copies of the questionnaire to hand to remind participants of the content of each of the score categories.

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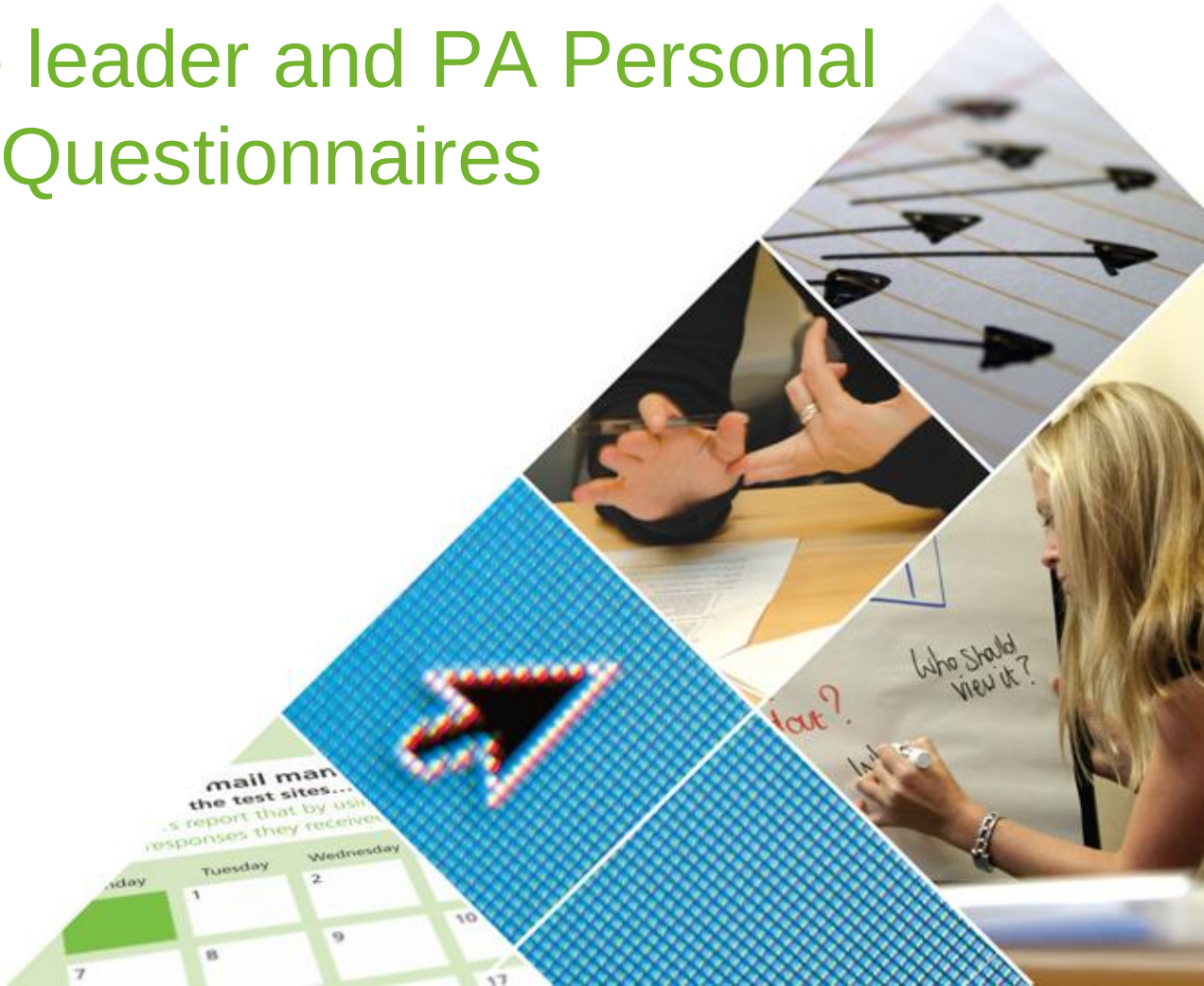
Content of the leader and PA Personal Effectiveness Questionnaires



Completing the PEQ

- The **questionnaire for leaders** contains a total of **65** questions. The recommended time to complete is 30 mins
- The **questionnaire for PAs** contains a total of **68** questions. The recommended time to complete is also 30 mins
- Responses for the questions are based on a ten point scale from s*trongly agree* to *strongly disagree*.
- There are two questions that require a response of *number of hours per week*.
- Where an individual feels they cannot respond an n/a option is also available

Leader questionnaire - contents

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Section 1:
30 questions on
personal effectiveness

Thinking Strategies
- I have a good knowledge of how the brain is constructed and how it operates.
- I have models to direct my thinking to achieve my goals.
- I am continuously assessing and challenging my behavioural habits.
- I am able to help other people to be more positive and optimistic.
- I know how to control my thoughts so as to manage my emotions.
- I focus on continuous personal and professional development.

Communicating and Influencing
- I know my personal impact on people and how they perceive me.
- I am able to speak up with confidence in a meeting where tempers are running high.
- If someone asks my permission to do something I would prefer them not to do, I can express my needs assertively.
- I know what the term Transactional Analysis means.
- I can give negative feedback easily and constructively.
- I can recognise when someone has a different approach to me and adapt my style to enhance communication.

Stress Management and Emotional Intelligence
- I understand what happens to the chemicals in my body when I am stressed.
- I notice when I start to feel frustrated or angry and I have techniques to calm myself.
- I pay a lot of attention to other people's emotional states.
- I know precisely which situations and people cause me stress.
- When facing a difficult situation I know how to put myself into an energetic and upbeat mood.
- I can manage other people's emotions to avoid conflict.

Generating Ideas and Creativity
- I feel confident in my ability to think creatively.
- I am able to motivate my team to think creatively.
- I know how to leverage the diverse thinking in my team.
- I apply techniques to break out of habitual thinking and behaviour.
- I allow others to express ideas without judging or criticising too quickly.
- I challenge myself to try new behaviours at work.

Workload Management
- I have the tools to quickly identify what is important in my inbox.
- I feel in control of my workload.
- I have confidence that I pick up key points when I am reading information.
- I have an effective method for note-taking information and ideas that aid recall.
- I can easily remember facts and figures, names and faces.
- I regularly keep up-to-date with recent information and recall key facts related to my role.

Leader questionnaire - contents

Section 2: 16 questions on **meetings management**

- I evaluate whether a meeting is absolutely necessary before proposing to hold one.
- I only invite people to meetings who are necessary to achieve the desired outcomes of the meeting.
- I create agendas for the meetings that I hold that are appropriate to the level of formality (i.e. one to ones have a high level agenda based on the discussion topics whereas a large formal meeting has timings and presenters allocated).
- I consider the desired outcome for each agenda item and tailor the meeting style accordingly where appropriate (i.e. using brainstorming techniques etc).
- I ensure that pre-reading is sent out to ensure participants have adequate time to read the materials prior to the meetings.
- I send the agenda out at least 24 hours in advance of the meeting ensuring that the purpose and objectives of the meeting are clearly stated.
- I delegate meetings where appropriate to junior members of staff in order to aid their development .
- I liaise with my PA to ensure that time is put into my diary to prepare for meetings on a weekly basis.
- I begin my meetings on time even if some participants are missing and end my meetings on time.
- I begin the meetings that I chair with an opening statement that frames the objectives of the meetings and highlights the agenda.
- I address non-productive behaviours and discussions in meetings in a positive manner.
- I review the actions captured in the meetings ensuring that roles and timescales have been allocated.
- I review the success of the meeting and whether the desired objectives have been achieved for myself and the participants.
- I ensure that the notes and actions from the meetings I chair are sent out in a timely manner (ideally within 48 hours).
- I follow up on the completion of the actions in order to ensure that actions are completed.
- **Approximately how much time do you spend per week in meetings?***

** Question open to numerical response, not ten -point scale.*

Leader questionnaire - contents

Section 3: 19 questions on **email management**

- I ensure that email is used mainly for short succinct messages that are action-focused.
- I use clear email subject lines that are action-focused and detail timings as necessary i.e. Action Required by 13 June: staff questionnaire.
- I ensure that the structure of the email is easy to follow for the recipient and that the purpose, context and actions in the email are explicit.
- I only send attachments when necessary, ensuring that the email size has been minimised as far as possible.
- I ensure that the language used in my emails is appropriate.
- I utilise shared drives when appropriate instead of emailing attachments.
- I use the spell-check before sending out emails.
- I use a signature that provides all of the relevant details needed for the recipients of my emails.
- I only 'cc' individuals into emails when it is absolutely necessary for their information purposes.
- I only use the 'To' function of emails for all those individuals required to action the email.
- I decide on the course of action to take with regards to an email the first time I open it.
- I have personal folders set up which are organised in a logical and easily navigational structure such as by project, name etc.
- I have discussed with my PA the need to regularly undertake a review of my email folder structure to ensure that it is still relevant and that irrelevant emails are deleted when necessary.
- I have agreed with my PA his/her role in dealing with my emails in order to ensure that there is no duplication of effort and that I utilise them effectively.
- I have discussed with my PA which emails he/she can action / delete etc on my behalf.
- I delegate emails where appropriate ensuring that the person I delegate to is clear about the action that is required of them.
- I have a mechanism in place to deal with those emails that I cannot action immediately.
- I delete or file emails once I have dealt with them ensuring that they do not stay in my inbox.
- **Approximately how much time per week do you spend managing emails?***

** Question open to numerical response, not ten-point scale.*

PA questionnaire - contents

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Section 1: 40 questions on **personal effectiveness**

Communicating and Influencing

- I know my personal impact on people and how they perceive me.
- I am able to speak up with confidence in a meeting where tempers are running high.
- If someone asks my permission to do something I would prefer them not to do, I can express my needs assertively.
- I know what the term Transactional Analysis means.
- I can give negative feedback easily and constructively.
- I can recognise when someone has a different approach to me and adapt my style to enhance communication.

Stress Management and Emotional Intelligence

- I understand what happens to the chemicals in my body when I am stressed.
- I notice when I start to feel frustrated or angry and I have techniques to calm myself.
- I pay a lot of attention to other people's emotional states.
- I know precisely which situations and people cause me stress.
- When facing a difficult situation I know how to put myself into an energetic and upbeat mood.
- I can manage other people's emotions to avoid conflict.

Generating Ideas and Creativity

- I feel confident in my ability to think creatively.
- I am able to motivate my team to think creatively.
- I know how to leverage the diverse thinking in my team.
- I apply techniques to break out of habitual thinking and behaviour.
- I allow others to express ideas without judging or criticising too quickly.
- I challenge myself to try new behaviours at work.

Workload Management

- I have the tools to quickly identify what is important in my inbox.
- I feel in control of my workload.
- I have confidence that I pick up key points when I am reading information.
- I have an effective method for note-taking information and ideas that aid recall.
- I can easily remember facts and figures, names and faces.
- I regularly keep up-to-date with recent information and recall key facts related to my role.

PA questionnaire - contents

Thinking Strategies

- I have a good knowledge of how the brain is constructed and how it operates.
- I have models to direct my thinking to achieve my goals.
- I am continuously assessing and challenging my behavioural habits.
- I am able to help other people to be more positive and optimistic.
- I know how to control my thoughts so as to manage my emotions.
- I focus on continuous personal and professional development.

Roles and Responsibilities

- I am clear about my responsibilities and how I am measured against these.
- I am clear about my manager's key responsibilities.
- I know how my accountabilities are split between my manager and I in relation to diary management.
- I know how my accountabilities are split between my manager and I in relation to management of his/her time and personal requirements (e.g. Providing refreshments, organising the office etc).
- I know how my accountabilities are split between my manager and I in relation to other administrative tasks, such as, filing, note-taking, etc.
- I know who my manager’s stakeholders are and how to manage them.
- I constantly review my systems and processes to ensure maximum efficiency.
- I regularly discuss opportunities for improvement of systems and processes with my manager.
- I regularly discuss with my manager, opportunities to improve our working relationship to make it more productive.
- I actively seek feedback from my manager in relation to areas in which I can individually improve to improve my/our productivity.

PA questionnaire - contents

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Section 2: 8 questions on **meetings management**

- I try to schedule meetings for a time and venue that is convenient for all participants.
- I ensure that pre-reading is sent out for my manager's meetings ensuring participants have adequate time to read the materials prior to the meeting.
- I send the agenda for my manager's meetings out at least 24 hours in advance of the meeting ensuring that the purpose and objectives of the meeting are clearly stated.
- I ensure that when organising meetings on behalf of my manager that participants are clear as to the purpose of the meeting and why their presence is required.
- I have discussed with my manager if they require time allocated in their diary for preparing for meetings on a weekly basis.
- I send the notes and actions from my manager's meetings in a timely manner (ideally within 48 hours).
- I have discussed with my manager the procedure for following up on actions from the meetings that they chair.
- **Approximately how much time do you spend per week in meetings?***

** Question open to numerical response, not ten-point scale.*

PA questionnaire - contents

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Section 3: 20 questions on **email management**

- I ensure that email is used mainly for short, succinct messages that are action-focused.
- I use clear email subject lines that are action-focused and detail timings as necessary i.e. Action Required by 13 June: staff questionnaire.
- I ensure that the structure of the email is easy to follow for the receiver and that the purpose, context and actions in the email are explicit.
- I only send attachments when necessary ensuring that the email size has been minimised as far as possible.
- I ensure that the language used in my emails is appropriate.
- I utilise shared drives when appropriate instead of emailing attachments.
- I utilise spell checking before sending out emails.
- I use a signature that provides all of the relevant details needed for the recipients of my emails.
- I only cc individuals into emails when it is absolutely necessary for their information purposes.
- I use the 'To' function of emails for all those individuals required to action the email.
- I decide on the course of action to take with regards to an email the first time I open it.
- I have discussed with my manager how they would like their personal folders set up and have organised them in a logical and easily navigational structure such as by project, name etc.
- I regularly undertake a review of my manager's folder structure to ensure that it is still relevant and that irrelevant stored emails are deleted when necessary.
- I have agreed with my manager my role in dealing with their emails in order to ensure that there is no duplication of effort.
- I have discussed with my manager which emails I can action / delete etc on his/her behalf.
- I have a mechanism in place to deal with those emails that I can not action immediately.
  I delete or file emails once I have dealt with them ensuring that they do not stay in my inbox.
- I undertake a monthly inbox audit to assess the type of emails my manager is receiving in order to address any unnecessary regular emails they are receiving.
- I undertake an annual storage audit to purge any unnecessary emails from my manager's storage folders.
- **Approximately how much time do you spend per week managing emails?***

** Question open to numerical response, not ten-point scale.*

Examples of team profiles

Individual profiles for each participant

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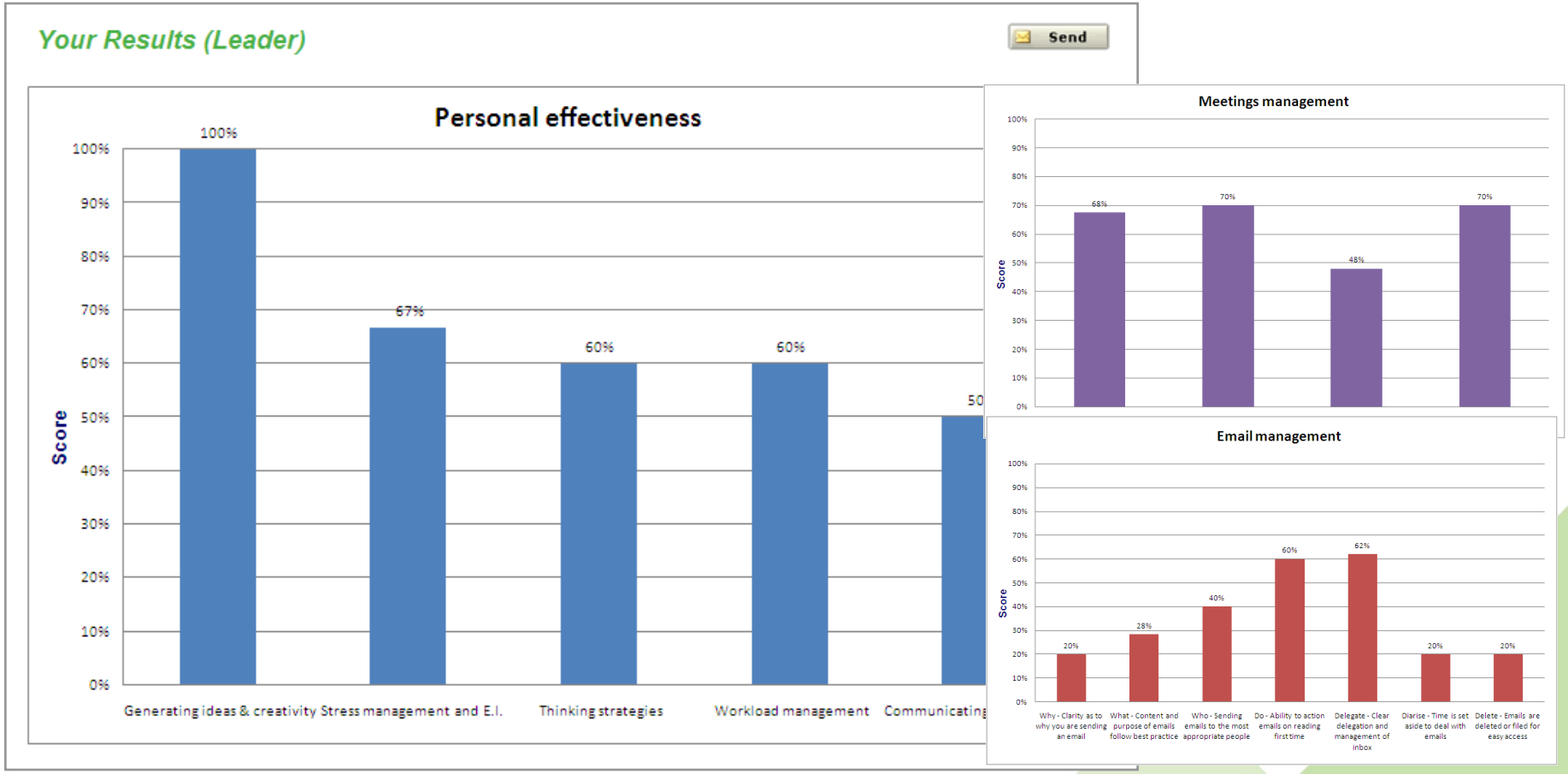
The participants all email their completed questionnaires to the Project Manager/Facilitator. Each individual participant receives graphical feedback. An example is provided below.*



*This screen print is taken from the leader questionnaire. The PA questionnaire is similar except that the categories along the horizontal axis are different

Team profiles for the leaders and PAs

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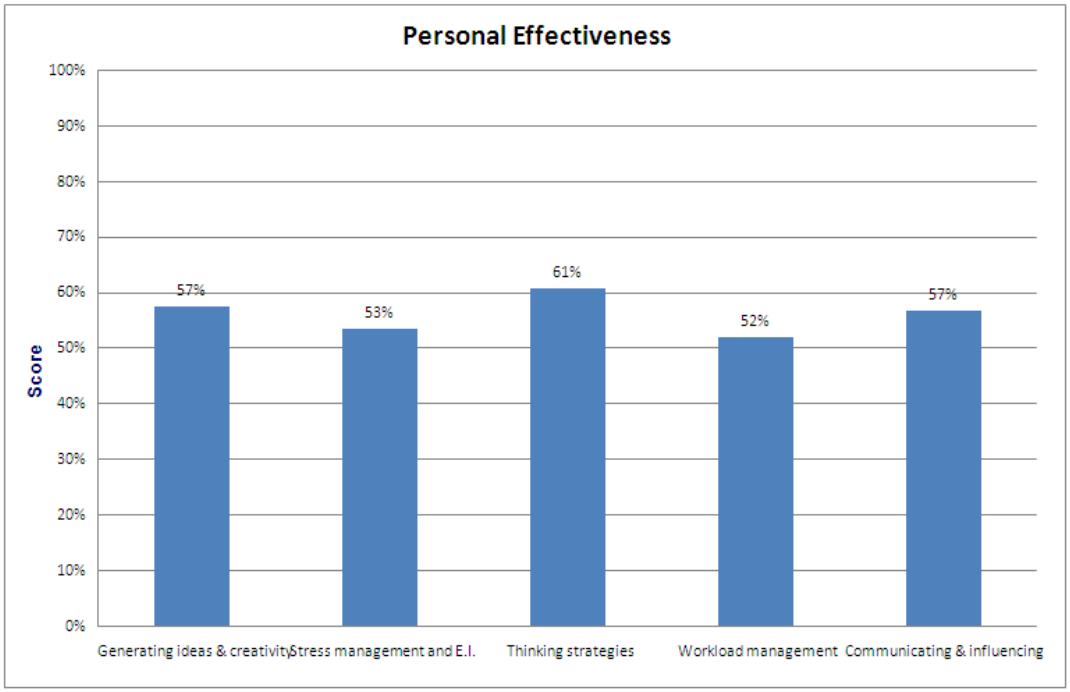
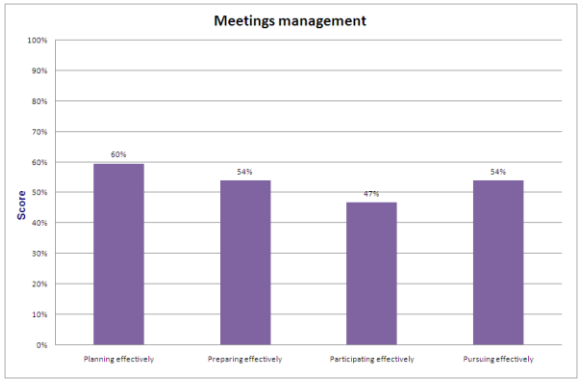
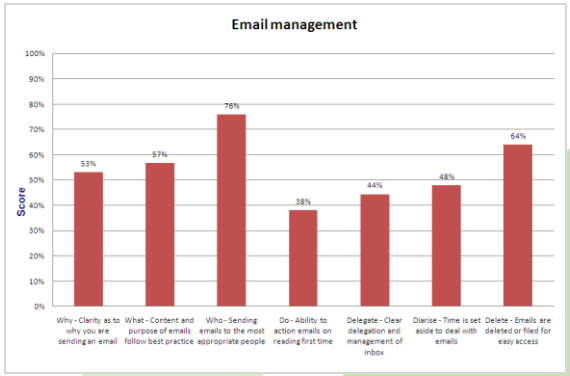
This is the graphical feedback that you will provide leaders and PAs in the coaching sessions. This enables them to compare their individual scores with those of the team (e.g. individual PAs will receive PA team results, individual leaders will receive team results for the leaders.)

Leaders - Team Results







**The team profile will be kept confidential by the NHS Institute and the details of the participants will be made anonymous.*

Step 1: Instructions for inserting your email address into the questionnaires

The Personal Effectiveness Questionnaire process

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1. Project Manager or Facilitator opens the leader and PA questionnaires

2. Inserts their email address into the second page of the leader and PA questionnaires (entitled 'your details')

3. Emails out the questionnaires to the relevant participants providing the appropriate deadline

4. Leaders and PAs complete questionnaires and view/save their individual results

5. Leader and PA results are sent back via email to the Project Manager/ Facilitator

6. Project Manager/ Facilitator copies and pastes results from the individual spreadsheets into the database

7. Project Manager/ Facilitator prints out the team profile for PAs and leaders for the Leadership Team Coaching session

8. Team profile is shared with the programme participants at the Leadership Team Coaching session

9. Project Manager/ Facilitator can use team profile charts for the email and meetings management sessions

10. Process can be repeated at a later date to see if improvements have been made

- Project Manager/Facilitator activities
- Participant activities

Overview of the instructions

Instructions for inserting your email address into the questionnaires*

- Open the leader spreadsheet , enable macro's, and press **'Next'**
- Select '**Review**', then '**Unprotect Sheet**'
- In the 'Project manager's email' enter your email address
- Then go back to '**Review**', select '**Protect Sheet**' and then **'Ok'**

See the following pages for step by step visual instructions

** The following instructions should be followed for both the leader and PA questionnaires*

Open the leader spreadsheet, enable macro's and press 'Next'

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Home Insert Page Layout Formulas Data Review View

Security Warning Some active content has been disabled. Options...

Microsoft Office Security Options

Security Alert - Macros & ActiveX

Macros & ActiveX

Macros and one or more ActiveX controls have been disabled. This active content might contain viruses or other security hazards. Do not enable this content unless you trust the source of this file.

Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source.

More information

File Path: C:\... Settings\allisonn\Desktop\Productive Leader\Questionnaire_Leader.xls

Help protect me from unknown content (recommended)

Enable this content

Open the Trust Center

OK Cancel

Instructions

Before starting the questionnaire please:

- Fill in your **details** on the front-page form
- Click **"Begin"**
- For **every** question enter an "x" in the ten-point rating scale

answer should be based on how strongly you agree or disagree

Whilst filling in the questionnaire, please:

- Answer **all** questions honestly
- Complete the questionnaire in **one-sitting**
- **Avoid distractions and interruptions** if possible

Once you have completed the questionnaire, please:

- Click **"Submit"** at the bottom of the page - upon which your
- Once you have viewed your results click **"Send"**; this will sa
- All details will be completed for you so simply **send** the ema
- You will then be **prompted** to save a copy for your personal

Please now **start** the questionnaire. Your co-operation and hones

Good luck and Go!

Next

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Select 'Review', then 'Unprotect Sheet'

Home | Insert | Page Layout | Formulas | Data | Review | View

Proofing: Spelling, Research, Thesaurus, Translate

Comments: New Comment, Delete, Previous, Next, Show/Hide Comment, Show All Comments, Show Ink

Changes: Unprotect Sheet, Protect Workbook, Share Workbook, Protect and Share Workbook, Allow Users to Edit Ranges, Track Changes

D24

Questionnaire Leader

The Productive Leader - Personal Effectiveness Questionnaire

Your Details
(Please enter below)

Name	
Department / Team	
Organisation	
Role	Leader
Project Manager's email	

Please contact the Project Manager if you are unable to complete this sheet or require assisstance.

Previous | Begin

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In the 'Project manager's email' enter your email address

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Home Insert Page Layout Formulas Data Review View

Spelling Research Thesaurus Translate — Proofing

New Comment Delete Previous Next Show/Hide Comment Show All Comments Show Ink — Comments

Unprotect Sheet Protect Workbook Share Workbook — Chang

EMAIL

Questionnaire Leader

The Productive Leader - Personal Effectiveness Questionnaire

Your Details
(Please enter below)

Name	
Department / Team	
Organisation	
Role	Leader
Project Manager's email	

Please contact the Project Manager if you are unable to complete this sheet or require assisstance.

Previous Begin

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Then go to 'Review', select 'Protect Sheet' and then 'OK'

Home Insert Page Layout Formulas Data Review View

Spelling Research Thesaurus Translate — Proofing

New Comment Delete Previous Next Show/Hide Comment Show All Comments Show Ink — Comments

Protect Sheet Protect Workbook Share Workbook Protect and Share Workbook Allow Users to Edit Ranges Track Changes — Changes

EMAIL

The Productive Leader - Personal Effectiveness Questionna

Your Details
(Please enter below)

Name	
Department / Team	
Organisation	
Role	Leader
Project Manager's email	

Please contact the Project Manager if you are unable to complete this sheet or require assisstance.

Previous Begin

Protect Sheet

☑ Protect worksheet and contents of locked cells

Password to unprotect sheet:

Allow all users of this worksheet to:

- ☑ Select locked cells
- ☑ Select unlocked cells
- ☐ Format cells
- ☐ Format columns
- ☐ Format rows
- ☐ Insert columns
- ☐ Insert rows
- ☐ Insert hyperlinks
- ☐ Delete columns
- ☐ Delete rows

OK Cancel

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Step 2: Instructions for creating the team profiles

The Personal Effectiveness Questionnaire process

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1. Project Manager or Facilitator opens the leader and PA questionnaires
2. Inserts their email address into the second page of the leader and PA questionnaires (entitled 'your details')
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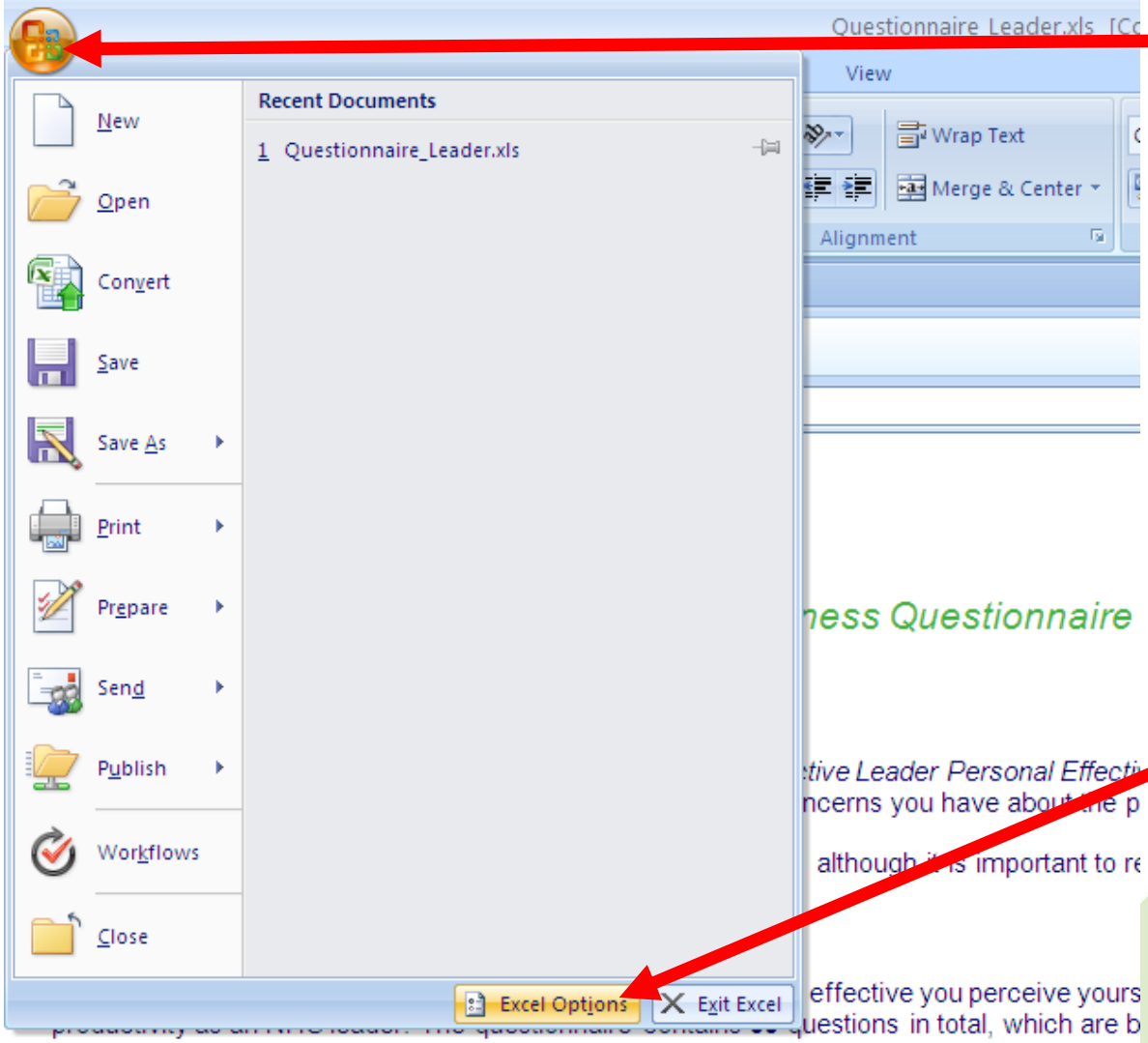
8. Team profile is shared with the programme participants at the Leadership Team Coaching session
9. Project Manager/ Facilitator can use team profile charts for the email and meetings management sessions
10. Process can be repeated at a later date to see if improvements have been made

- Project Manager/Facilitator activities
- Participant activities

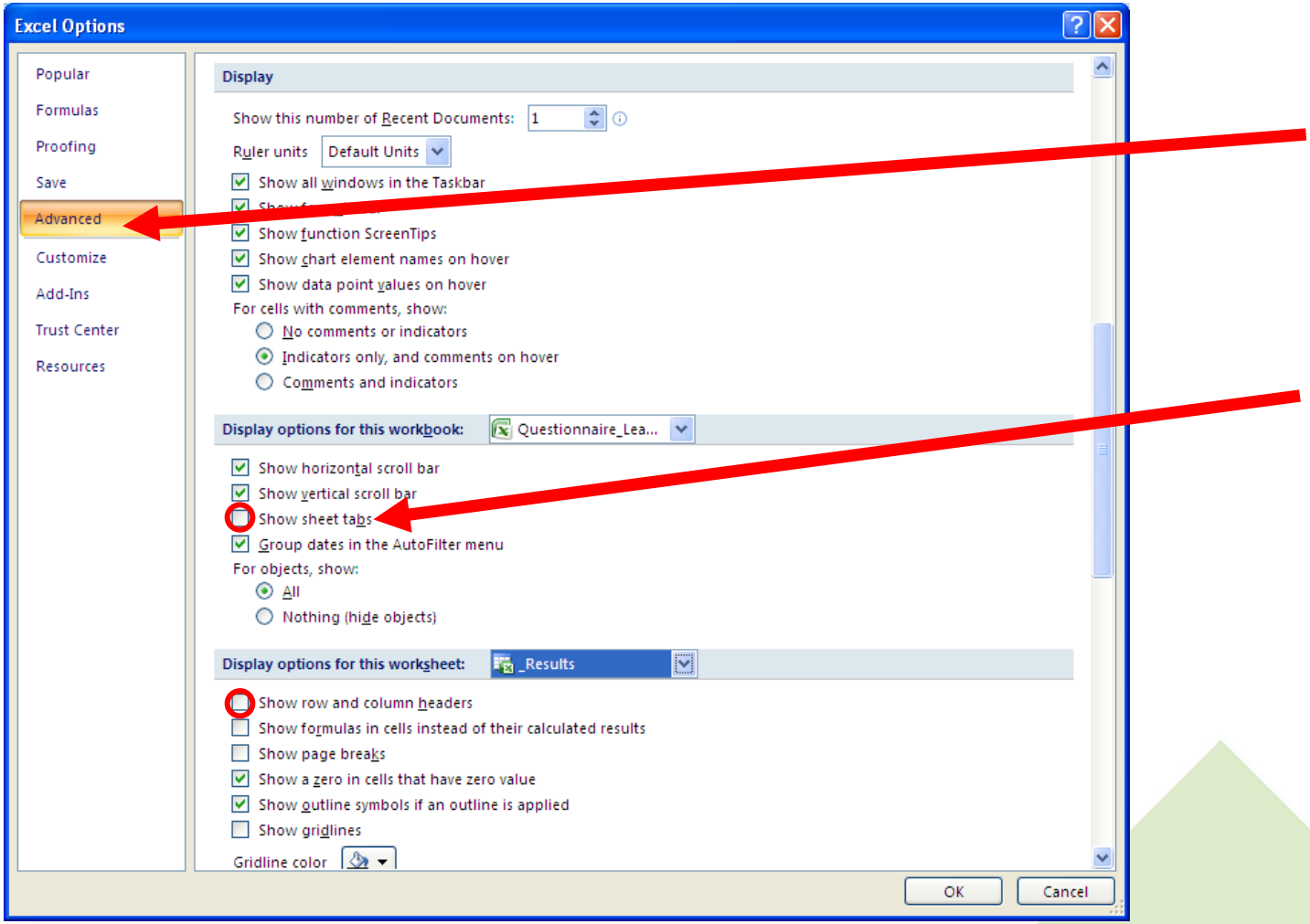
Overview of the instructions

1. Open the first spreadsheet that is completed by the leader and returned to you
2. Select '**Office Button**' and then '**Excel Options**'
3. Select the '**Advanced**' option, scroll down to the 'Display options for this workbook' section, and check the '**Show Sheet tabs**' box.
4. Under the 'Display options for this worksheet' section, click on the drop down box select '**_Results**', and check the '**Show row and column headers**' box.
5. The sheets contained in the spreadsheet will now be visible. Select the fourth sheet titled '_Results' sheet
6. Click on the cell shown – column H, row 6
7. Select all of the cells from row 6 to row 73. These are the light green coloured cells
8. Right click on one of the selected cells and select '**Copy**'
9. Open the 'Questionnaire_Database' spreadsheet and select the 'Leader_Results' tab
10. Select the first cell in the 'Name' column as shown below
11. Right click and select '**Paste Special**'
12. In the 'Paste' section select '**Values**' and then check the '**Transpose**' box. Then click '**OK**'
13. The results from the individuals spreadsheet should now appear in the selected row
14. Undertake the same process (page 12 through to 23) for the remaining leaders' spreadsheets*

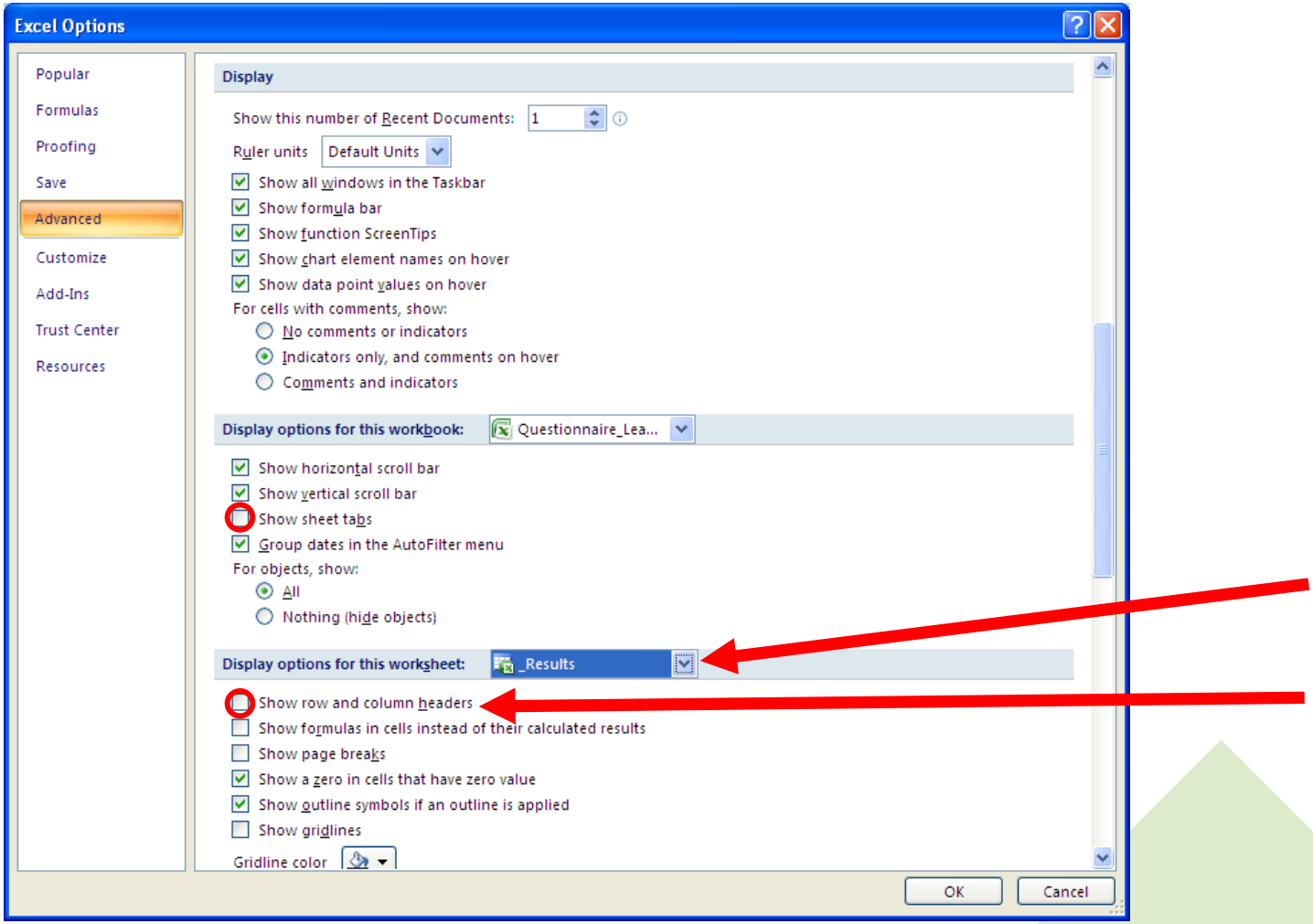
Open the first spreadsheet that is completed by the leader and returned to you. Select the ‘Office button’ and then ‘Excel Options’.



Select the 'Advanced' option, scroll down to the 'Display options for this workbook' section, and check the 'Show Sheet tabs' box.



Under the 'Display options for this worksheet' section, click on the drop down box select '_Results', and check the 'Show row and column headers' box. Click OK



The sheets contained in the spreadsheet will now be visible. Select the fourth sheet titled '_Results'

The format

The following questions form a simple **self-assessment** of how effective you perceive yourself to be in overall productivity as an NHS leader. The questionnaire contains **65** questions in total, which are broken down into:

email and meetings management
35 questions covering how you management emails and meetings

self development and personal effectivness
30 questions covering your personal skills, thinking style, communication and creativity

Background

It is important to remember that this questionnaire is **confidential** and the results **are for your use** during the programme and beyond, in order to measure your own improvement. A consolidated view of the **overall team results** for leaders will also be provided during the programme in order to identify team strengths and areas for improvement.

Following completion of the questionnaire, you will receive a **profile** that provides you with scores that highlight your strengths as well as opportunities for development based on your self assessment.

Your PAs will also be completing a similar questionnaire and this, together with your results, will form part of an overall picture about where you can focus on opportunities for improvement.

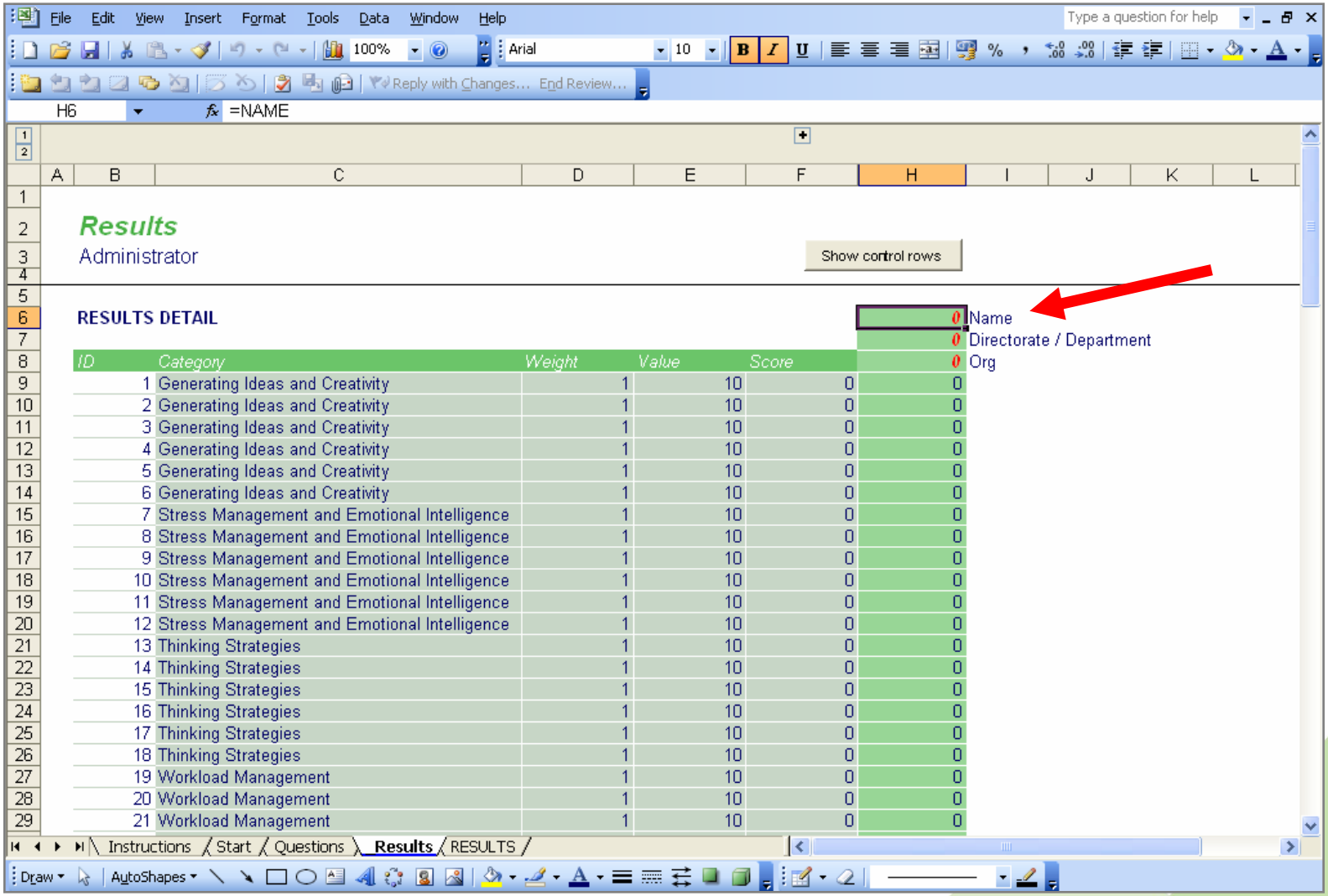
Instructions

Before starting the questionnaire please:

- Fill in your **details** on the front-page form
- Click **"Begin"**

Instructions | Start | Questions | Results | RESULTS

Click on the cell shown – column H, row 6



Select all of the cells from row 6 to row 73. These are the light green coloured cells

Questionnaire Leader

Results

Administrator

Show control rows

RESULTS DETAIL

					0	Name
					0	Department / Team
ID	Category	Weight	Value	Score	0	Org
1	Generating Ideas and Creativity	1	10	7	7	
2	Generating Ideas and Creativity	1	10	3	3	
3	Generating Ideas and Creativity	1	10	6	6	
4	Generating Ideas and Creativity	1	10	6	6	
5	Generating Ideas and Creativity	1	10	6	6	
6	Generating Ideas and Creativity	1	10	6	6	
7	Stress Management and Emotional Intelligence	1	10	6	6	
8	Stress Management and Emotional Intelligence	1	10	6	6	
9	Stress Management and Emotional Intelligence	1	10	6	6	
10	Stress Management and Emotional Intelligence	1	10	6	6	
11	Stress Management and Emotional Intelligence	1	10	6	6	
12	Stress Management and Emotional Intelligence	1	10	6	6	
13	Thinking Strategies	1	10	6	6	
14	Thinking Strategies	1	10	6	6	
15	Thinking Strategies	1	10	6	6	
16	Thinking Strategies	1	10	6	6	
17	Thinking Strategies	1	10	6	6	
18	Thinking Strategies	1	10	6	6	
19	Workload Management	1	10	6	6	
20	Workload Management	1	10	6	6	
21	Workload Management	1	10	6	6	
22	Workload Management	1	10	6	6	
23	Workload Management	1	10	6	6	
24	Workload Management	1	10	6	6	
25	Communicating and Influencing	1	10	5	5	
26	Communicating and Influencing	1	10	5	5	
27	Communicating and Influencing	1	10	5	5	
28	Communicating and Influencing	1	10	5	5	
29	Communicating and Influencing	1	10	5	5	
30	Communicating and Influencing	1	10	5	5	
31	Plan	1	10	6	6	
32	Plan	1	10	7	7	
33	Plan	1	10	7	7	

Instructions | Start | Questions | Results | RESULTS

Right click on the one of the selected cells, and select 'Copy'

Results

Administrator

Show control rows

RESULTS DETAIL

ID	Category	Weight	Value	Score
1	Generating Ideas and Creativity	1	10	7
2	Generating Ideas and Creativity	1	10	3
3	Generating Ideas and Creativity	1	10	6
4	Generating Ideas and Creativity	1	10	6
5	Generating Ideas and Creativity	1	10	6
6	Generating Ideas and Creativity	1	10	6
7	Stress Management and Emotional Intelligence	1	10	6
8	Stress Management and Emotional Intelligence	1	10	6
9	Stress Management and Emotional Intelligence	1	10	6
10	Stress Management and Emotional Intelligence	1	10	6
11	Stress Management and Emotional Intelligence	1	10	6
12	Stress Management and Emotional Intelligence	1	10	6
13	Thinking Strategies	1	10	6
14	Thinking Strategies	1	10	6
15	Thinking Strategies	1	10	6
16	Thinking Strategies	1	10	6
17	Thinking Strategies	1	10	6
18	Thinking Strategies	1	10	6
19	Workload Management	1	10	6
20	Workload Management	1	10	6
21	Workload Management	1	10	6

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Delete...
Clear Contents
Filter
Sort
Insert Comment
Format Cells...
Pick From Drop-down List...
Name a Range...
Hyperlink...

Open the 'Questionnaire_Database' spreadsheet and select the 'Leader_Results' tab

Questionnaire Database

Results
Leader

Facilitator Instructions

For each of the participants that have completed the Leader questionnaire (Questionnaire_Leader.xls):

1 - From within the 'Results' worksheet of the Leader questionnaire, select the range H6 - H73, right-click, and select 'Copy'
2 - Within this worksheet, select cell B11 (or the next available row), right-click and select 'Paste Special'
3 - On the box that pops up - select both the options called 'Values' and 'Transpose' and then click OK.
4. - Graphs representing the results are automatically generated in the Leader-Graph tab. These steps need to be repeated for the PA resu

RESULTS DETAIL

Name	Department / Team	Organisation	Question 1	2	3	4	5	6	7	8	9	1
Total			0	0	0	0	0	0	0	0	0	0
Average			0	0	0	0	0	0	0	0	0	0

Number of respondents: 0

Group	Category	Last question	Team score	Maximum	Percentage	Category Desc
Start at:		0				
	Generating Ideas and Creativity	6	0	60	0%	Generating ideas
	Stress Management and Emotional Intelligence	12	0	60	0%	Stress manageme
Pers Eff	Thinking Strategies	18	0	60	0%	Thinking strategie
	Workload Management	24	0	60	0%	Workload manage
	Communicating and Influencing	30	0	60	0%	Communicating &
	Plan	34	0	40	0%	Planning effective
Meetings	Prepare	38	0	40	0%	Preparing effectiv
	Participate	43	0	50	0%	Participating effec
	Pursue	45	0	20	0%	Pursuing effective
	Why	47	0	20	0%	Why - Clarity as to
	What	53	0	60	0%	What - Content an
	Who	55	0	20	0%	Who - Sending em
Email	Do	56	0	10	0%	Do - Ability to acti

Intro | Leader_Results | PA_Results | Leader-Graph | PA-Graph

Select the first cell in the ‘Name’ column as shown below

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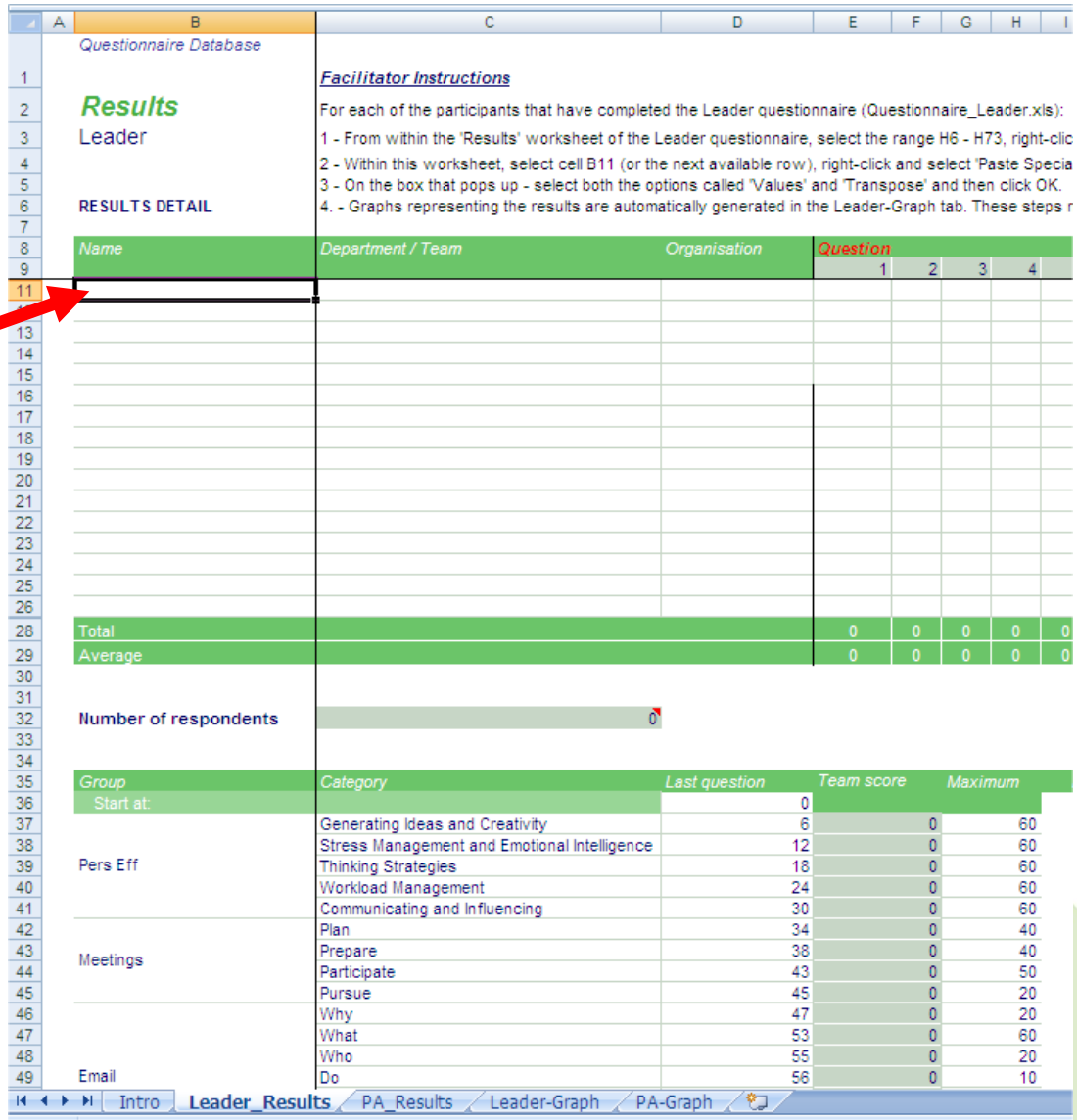

Questionnaire Database

Results

Leader

RESULTS DETAIL

Facilitator Instructions

For each of the participants that have completed the Leader questionnaire (Questionnaire_Leader.xls):

1 - From within the 'Results' worksheet of the Leader questionnaire, select the range H6 - H73, right-clic

2 - Within this worksheet, select cell B11 (or the next available row), right-click and select 'Paste Specia

3 - On the box that pops up - select both the options called 'Values' and 'Transpose' and then click OK.

4. - Graphs representing the results are automatically generated in the Leader-Graph tab. These steps r

Name	Department / Team	Organisation	Question 1	2	3	4	
Total			0	0	0	0	0
Average			0	0	0	0	0

Number of respondents: 0

Group	Category	Last question	Team score	Maximum
Start at:		0		
Pers Eff	Generating Ideas and Creativity	6	0	60
	Stress Management and Emotional Intelligence	12	0	60
	Thinking Strategies	18	0	60
	Workload Management	24	0	60
	Communicating and Influencing	30	0	60
Meetings	Plan	34	0	40
	Prepare	38	0	40
	Participate	43	0	50
	Pursue	45	0	20
Email	Why	47	0	20
	What	53	0	60
	Who	55	0	20
	Do	56	0	10

Intro | Leader_Results | PA_Results | Leader-Graph | PA-Graph

Right click and select 'Paste Special'

Questionnaire Database

Results
Leader

Facilitator Instructions

For each of the participants that have completed the Leader questionnaire (Questionnaire_Leader.xls):

1 - From within the 'Results' worksheet of the Leader questionnaire, select the range H6 - H73, right-click, and select

2 - Within this worksheet, select cell B11 (or the next available row), right-click and select 'Paste Special'

3 - On the box that pops up - select both the options called 'Values' and 'Transpose' and then click OK.

RESULTS DETAIL ... are automatically generated in the Leader-Graph tab. These steps need to be rep

Arial 10

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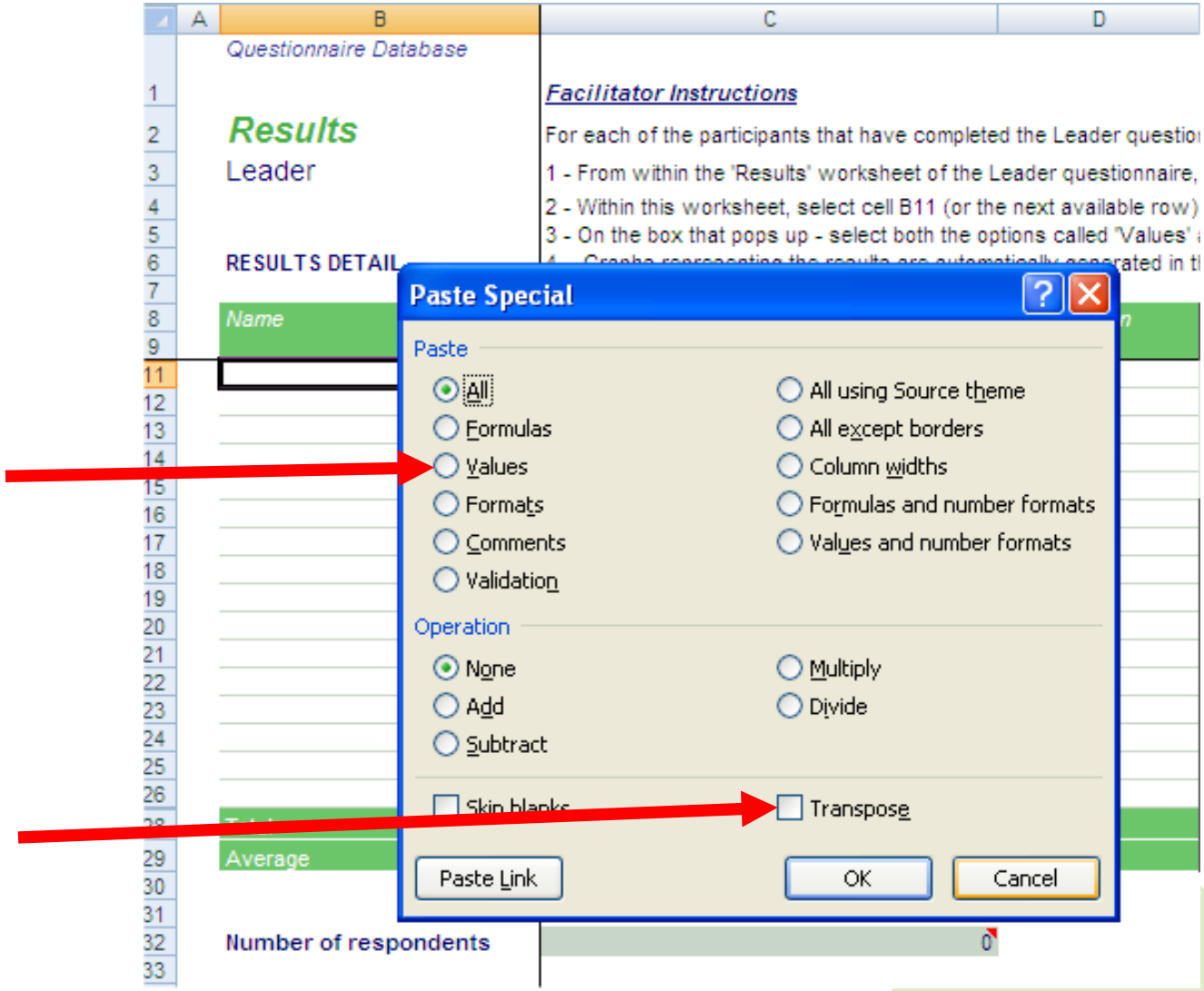
Format Cells...
Pick From Drop-down List...
Name a Range...
Hyperlink...

Name	Organisation	Question 1	2	3	4	5	6
Total		0	0	0	0	0	0
Average		0	0	0	0	0	0

Number of resp... 0

Group	Category	Last question	Team score	Maximum	Percentage
Start at:		0			
	Generating Ideas and Creativity	6	0	60	0%
	Stress Management and Emotional Intelligence	12	0	60	0%
Pers Eff	Thinking Strategies	18	0	60	0%
	Workload Management	24	0	60	0%
	Communicating and Influencing	30	0	60	0%
	Plan	34	0	40	0%
	Prepare	38	0	40	0%

In the 'Paste' section select 'Values' and then check the 'Transpose' box. Then click 'OK'



The results from the individuals spreadsheet should now appear in the selected row

Questionnaire Database

Results
Leader

RESULTS DETAIL

Facilitator Instructions

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2 - Within this worksheet, select cell B11 (or the next available row), right-click and select 'Paste Special'

3 - On the box that pops up - select both the options called 'Values' and 'Transpose' and then click OK.

4. - Graphs representing the results are automatically generated in the Leader-Graph tab. These steps need to be repeated for the PA results

Name	Department / Team	Organisation	Question 1	2	3	4	5	6	7	8	9	10	1
Joe Bloggs	Services	Anonymous Primary	7	3	6	6	6	6	6	6	6	6	
Total			7	3	6	6	6	6	6	6	6	6	6
Average			7	3	6	6	6	6	6	6	6	6	6

Number of respondents 1

Undertake the same process for the remaining leaders' spreadsheets*

Questionnaire Database

Results
Leader

RESULTS DETAIL

Facilitator Instructions

For each of the participants that have completed the Leader questionnaire (Questionnaire_Leader.xls):

1 - From within the 'Results' worksheet of the Leader questionnaire, select the range H6 - H73, right-click, and select 'Copy'

2 - Within this worksheet, select cell B11 (or the next available row), right-click and select 'Paste Special'

3 - On the box that pops up - select both the options called 'Values' and 'Transpose' and then click OK.

4. - Graphs representing the results are automatically generated in the Leader-Graph tab. These steps need to be repeated for th

Arial 10

Name	Organisation	Question 1	2	3	4	5	6	7	8
Joe Bloggs	Anonymous Primary	7	3	6	6	6	6	6	6
Total		7	3	6	6	6	6	6	6
Average		7	3	6	6	6	6	6	6

Number of resp 1

Cut
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Paste
Paste Special...
Insert...
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Clear Contents
Filter
Sort
Insert Comment
Format Cells...
Pick From Drop-down List...
Name a Range...
Hyperlink...

Group	Last question	Team score	Maximum	Percentage	Categ
Start at:	0				

*This whole process should be undertaken for the PAs once the leaders' spreadsheets have been completed

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Step 3: Instructions for generating team profiles for the coaching sessions

The Personal Effectiveness Questionnaire process

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1. Project Manager or Facilitator opens the leader and PA questionnaires
2. Inserts their email address into the second page of the leader and PA questionnaires (entitled 'your details')
3. Emails out the questionnaires to the relevant participants providing the appropriate deadline
4. Leaders and PAs complete questionnaires and view/save their individual results
5. Leader and PA results are sent back via email to the Project Manager/ Facilitator
6. Project Manager/ Facilitator copies and pastes results from the individual spreadsheets into the database
7. Project Manager/ Facilitator prints out the team profile for PAs and leaders for the Leadership Team Coaching session
8. Team profile is shared with the programme participants at the Leadership Team Coaching session
9. Project Manager/ Facilitator can use team profile charts for the email and meetings management sessions
10. Process can be repeated at a later date to see if improvements have been made

- Project Manager/Facilitator activities
- Participant activities

You will need to generate the team profiles for the coaching sessions

- You can use the team profile results for the following sessions:
  - Leadership Team Coaching session
  - Email Management session
  - Meetings Management session

- In each session you should plan to provide the following:
  - For PAs – each PA to have a copy of the PA team profile
  - For leaders – each leader to have a copy of the leader team profile
  - All participants - each individual to have a copy of their own profile

- From the ‘Questionnaire_Database.xls’ you will be able to copy and paste the relevant charts to inform each session.

To view the team scores for each coaching session look at the Questionnaire_Database spreadsheet

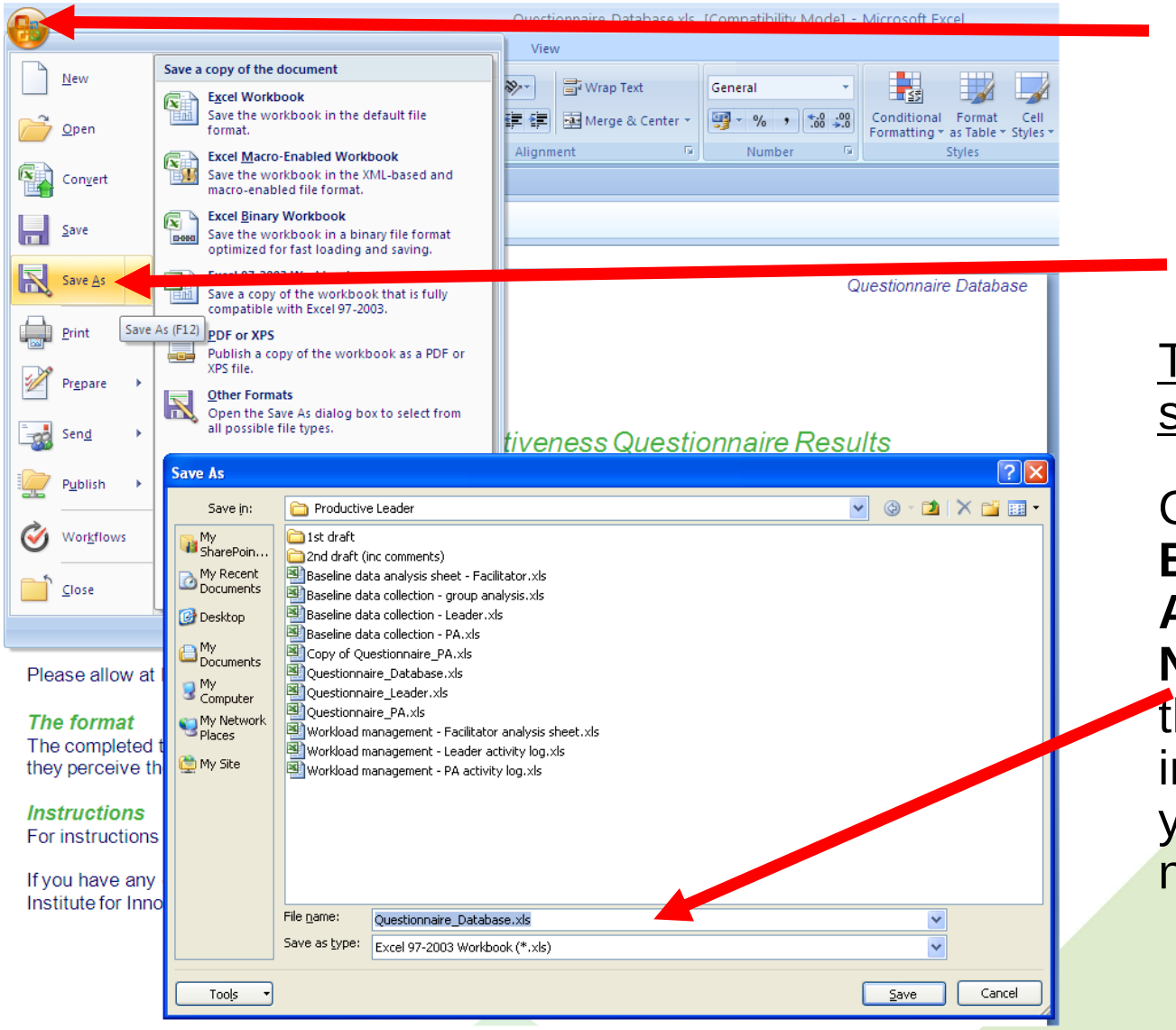
The information for the Email Management sessions can be found on the second tab titled Leader_Results and the third tab titled PA_Results at the bottom of the spreadsheet

Group	Category	Last question	Team score	Maximum
Start at:		0		
Leader	Generating Ideas and Creat	6	28	60
	Stress Management and En	12	26	40
	Thinking Strategies	18	34	60
	Workload Management	24	28	60
	Communicating and Influenc	30	35	60
Meetings	Plan	34	21	10
	Prepare	38	21	40
	Participate	43	27	50
	Pursue	45	14	20
Email	Why	47	11	20
	What	53	33	60
	Who	55	12	20
	Do	56	4	10
	Delegate	61	27	50
	Diarise	62	4	10
	Delete	63	7	10

The information for the Meeting Management sessions can be found on the second tab titled Leader_Results and the third tab titled PA_Results at the bottom of the spreadsheet

Group	Category	Last question	Team score	Maximum
Start at:		0		
PA	Role and responsibilities	6	0	50
	Personal effectiveness	12	0	30
Meetings	Prepare	18	0	50
	Pursue	24	0	20
Email	Why	30	0	20
	What	34	0	60
	Who	38	0	20
	Do	43	0	10
	Delegate	45	0	40
	Diarise	47	0	10
	Delete	53	0	30

Once you have created the team profile make sure that you save a copy. This will allow you to use the blank Database spreadsheet again



<u>To save the spreadsheet:</u>

Go to the **Office Button,** click **Save As,** and in the **File Name** section change the file name to include the date and your organisation name.