

Peer Scorecard

Your Name: \_\_\_\_\_ Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_



Instructions:

Plotting the Combinations

Determine the Factor Combinations of the individuals for A:B, A:C and A:D.

- Factor Combinations may:
- Cross the Midpoint (ex: A > B)
  - Be on the same side of the Midpoint (ex: A & B Both High or Low)
  - Be aligned (ex: A = B)

Scoring

Check off and score 1 point for each of the strategies you regularly use when working with this person.

Total Score: \_\_\_\_ out of 12

Action Planning

Now that you know your score, check out the Action Planning template to plan for future interactions.

A:B Task or People Oriented	<div><div></div>A &amp; B: Both Low</div> <div>Do I currently: <div><input type="checkbox"/> Offer private recognition for team contributions</div><div><input type="checkbox"/> Make myself available to guide decisions when necessary</div><div><input type="checkbox"/> Offer help and guidance when addressing new tasks or assignments</div><div><input type="checkbox"/> Communicate information early, allowing time to think things through</div></div> <div>Score: ____ out of 4</div>	<div><div></div>B &gt; A: People Oriented (Crosses the Midpoint)</div> <div>Do I currently: <div><input type="checkbox"/> Act as a sounding board and provide opportunities to connect and talk things through</div><div><input type="checkbox"/> Offer positive feedback frequently and offer to help and collaborate when appropriate</div><div><input type="checkbox"/> Communicate in person rather than in writing or via email</div><div><input type="checkbox"/> Check in with them frequently on projects they care about or are closely associated with</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A = B</div> <div>Do I currently: <div><input type="checkbox"/> Understand that on some occasions they will focus on technical matters and in other situations focus on people</div><div><input type="checkbox"/> Make myself available to help them make decisions if they reach out to me</div><div><input type="checkbox"/> Check in with them to determine if a technical or personal approach is required in a specific situation</div><div><input type="checkbox"/> Balance my communication to include a mix of email, face-to-face, phone and writing</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A &amp; B: Both High</div> <div>Do I currently: <div><input type="checkbox"/> Encourage both independent and collaborative opportunities for goal achievement</div><div><input type="checkbox"/> Solicit input frequently</div><div><input type="checkbox"/> Support their need to identify solutions, collaboratively or independently</div><div><input type="checkbox"/> Collaborate frequently while preserving their need for control</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A &gt; B: Task Oriented (Crosses the Midpoint)</div> <div>Do I currently: <div><input type="checkbox"/> Keep communications focused on tasks rather than topics that are social in nature</div><div><input type="checkbox"/> Ensure they have a voice in setting priorities, expressing ideas, and putting them into action</div><div><input type="checkbox"/> Recognize the tangible results they obtain rather than “softer” achievements</div><div><input type="checkbox"/> Solicit their feedback, particularly in areas of their technical expertise</div></div> <div>Score: ____ out of 4</div>
	<div><div></div>A &amp; C: Both Low</div> <div>Do I currently: <div><input type="checkbox"/> Clarify how expedited work will help team efforts</div><div><input type="checkbox"/> Offer encouragement when they are doing routine work</div><div><input type="checkbox"/> Offer support when complex, high-pressure decisions need to be made</div><div><input type="checkbox"/> Ensure that initiatives and agendas are clear</div></div> <div>Score: ____ out of 4</div>	<div><div></div>C &gt; A: Responsive (Crosses the Midpoint)</div> <div>Do I currently: <div><input type="checkbox"/> Avoid fire drills or last-minute, high-stake requests that create pressure or tension</div><div><input type="checkbox"/> Follow a consistent process when working with them</div><div><input type="checkbox"/> Make sure my interactions don’t feel rushed or transactional</div><div><input type="checkbox"/> Give them time to buy into new ideas and provide the “why” to help them be receptive to the change</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A = C</div> <div>Do I currently: <div><input type="checkbox"/> Provide them with sufficient time to respond to my requests</div><div><input type="checkbox"/> Take the time to patiently listen to their point of view</div><div><input type="checkbox"/> Build in regular checkpoints in our work together but let them deviate when needed</div><div><input type="checkbox"/> Support their sometimes competitive/ sometimes cooperative approach</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A &amp; C: Both High</div> <div>Do I currently: <div><input type="checkbox"/> Explain the “why” behind change to help them prioritize their own goals</div><div><input type="checkbox"/> Support their need to make independent decisions and contribute to the agenda</div><div><input type="checkbox"/> Avoid interrupting when they are explaining their ideas</div><div><input type="checkbox"/> Build regular checkpoints into our work together</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A &gt; C: Proactive (Crosses the Midpoint)</div> <div>Do I currently: <div><input type="checkbox"/> Acknowledge their need to make things happen quickly</div><div><input type="checkbox"/> Invite their participation when new challenges arise (They love a challenge!)</div><div><input type="checkbox"/> Avoid routine and repetition in our work together</div><div><input type="checkbox"/> Ensure that my conversations with them get right to the point</div></div> <div>Score: ____ out of 4</div>
	<div><div></div>A &amp; D: Both Low</div> <div>Do I currently: <div><input type="checkbox"/> Encourage and support their flexible approach to completing team initiatives</div><div><input type="checkbox"/> Value their unselfish team-oriented approach to their work</div><div><input type="checkbox"/> Work to establish clarity on timelines and the non-negotiables on deliverables</div><div><input type="checkbox"/> Encourage and provide supportive insight for innovative thinking</div></div> <div>Score: ____ out of 4</div>	<div><div></div>D &gt; A: Cautious With Risk (Crosses the Midpoint)</div> <div>Do I currently: <div><input type="checkbox"/> Provide detailed information when describing my expectations</div><div><input type="checkbox"/> Take caution not to criticize and, if feedback is required, remember to be careful with my words</div><div><input type="checkbox"/> Provide thorough, specific responses to their questions and requests</div><div><input type="checkbox"/> Give them ample information and time if they need to make a decision</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A = D</div> <div>Do I currently: <div><input type="checkbox"/> Provide support when they are torn between “getting it done” and “getting it right”</div><div><input type="checkbox"/> Make myself available when they are making a decision outside of their area of expertise</div><div><input type="checkbox"/> Engage them privately when a discussion is needed</div><div><input type="checkbox"/> Help them identify what they need in order to move forward to action</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A &amp; D: Both High</div> <div>Do I currently: <div><input type="checkbox"/> Support their need to have control over results and outcomes</div><div><input type="checkbox"/> Make myself or another expert available when the person is making a decision outside of their area of expertise or when structure is unclear</div><div><input type="checkbox"/> Engage them privately when critique is needed</div><div><input type="checkbox"/> Provide clear parameters or a framework of new initiatives, allowing for their personal insight</div></div> <div>Score: ____ out of 4</div>	<div><div></div>A &gt; D: Comfortable With Risk (Crosses the Midpoint)</div> <div>Do I currently: <div><input type="checkbox"/> Keep conversations “big picture”, with goals and strategy in mind</div><div><input type="checkbox"/> Expect that they will want to do things their own way</div><div><input type="checkbox"/> Respond positively to new ideas and changes that they initiate</div><div><input type="checkbox"/> Avoid overloading them with too many rules or processes in our work together</div></div> <div>Score: ____ out of 4</div>

Your Name: \_\_\_\_\_ Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_



# Action Plan

## Instructions:

Look over the results of your Scorecard to help you complete each section below.

### 1. Personal Reflection

What have I done well with this individual?

What can I do better with this individual?

### 2. Action Plan

**What specific actions will I take in the next 90 days to enhance the way I work with this individual?**

*For example: I will take Emily (high Extraversion) to lunch once a month to establish a more personal connection.*

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### 3. Understand the Impact of My Own PI Behavioral Pattern

**Knowing my own PI behavioral pattern, what might prevent me from carrying out my Action Plan?**

**What will I do about that?**

### 4. Check My Progress

I will follow up with \_\_\_\_\_ (select another participant)

on \_\_\_\_\_ (date) to discuss my progress regarding this Action Plan.

Support materials are helpful, but they're no substitute for the deep insights a well-trained PI Practitioner.

Contact your PI Consultant or visit [www.predictiveindex.com](http://www.predictiveindex.com) to learn about upcoming workshops.

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