

# **Individual Values Assessment**

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**Corporate Transformation Tools**

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# Individual Values Assessment

## PAT HOLLISTER

### Personal Values

- Pat is a person who cares strongly about others and the quality of her relationships with **compassion**, **family**, **open communication** and **respect**. She sets high standards for herself and does what she says she is going to do as shown by **accountability**, **ethics** and **excellence**. Her values of **enthusiasm** and **knowledge** show that she is a fearless person and that she has no compunction about standing for what she believes in. **Vision** shows an appreciation for forward thinking.
- HEALTH INDEX: PL = 10-0  
All positive values. Not a fear-dominated person.
- BALANCE INDEX: IRS 4-5-1  
Pat's distribution of values types is excellent in that she favors not only her personal strengths with four individual values, but complements her life with a strong focus on other people as shown by five "relationship" values and one "societal" value. Clearly she is a "people-person".
- Values are distributed across four of the seven levels of consciousness with no predominance of values at any one level. There are no values at level 1 (Survival), level 3 (Self-esteem) and level 6 (Inclusion).

When values are missing in a level, it indicates one of three things. It may mean that the issues for that level are already handled; it may be a blind spot; or it may indicate the next level of evolution. What is the case here?

- There is one matching value between Pat's Personal and Current Culture Values – **knowledge**. This, along with the one values match, indicates that she is not experiencing a high degree of satisfaction in her workplace. There is a mismatch here.

## Current Culture Values

- The values on this list depict a culture that focuses predominantly on making money and its products with **financial stability, profit, achievement, productivity and results orientation**. Personal position takes precedence over the quality of employee relationships as shown by **control, internal competition, loyalty and power**. This is a culture that does not focus on the people whether it is employees or customers.
- HEALTH INDEX: PL = 7-3  
This shows an organization managed by fear. There are three potentially limiting values. What is the cause behind each of these values?

**Control** implies a lack of trust in others. Control can block innovation, creativity, accountability and entrepreneurship. It is usually a sign of deep-seeded fears. Control can sometimes be seen as a positive value only when working with financial departments.

**Internal Competition** is potentially limiting when it prevents open communication and the sharing of information, resources or ideas. The focus is on self-interest rather than the common good.

**Power** can mean several things. Positively, it depicts drive, ambition or the force that propels an organization to greater heights. It becomes a limiting value when it denotes a desire for supremacy or control at any expense without regard for the needs of others.

- BALANCE INDEX: IROS (P) 1-1-5-0  
Balance of values shows a poor distribution of values types with one “individual”, one “relationship”, five “organizational” and no “societal” values. This depicts a company that focuses on its product and not on its people.

This is in strong contrast with Pat’s Personal Values list that has five “relationship” values.

- The values are distributed across four of the seven levels of consciousness with predominance at level 1 (Survival) and level 3 (Self-esteem). The first three levels of this model represent the realm of self-interest, whereas the top three levels represent the common good. The results here depict an organization that is concerned only with itself.

There are no values at level 6 (Inclusion) and level 7 (Unity). Are these areas covered in the current culture at all or are they areas that need attention?

- There are two matching values between Pat’s Current Culture and Desired Culture lists – **financial stability** and **results orientation**. This shows that the organization is, in small part, on the right track in her opinion.

## Desired Culture Values

- The Desired Culture values list is comprised of values focused on connecting with people outside the organization as shown by **customer collaboration** and **external partnering**. The values of **open communication**, **recognition** and **respect** indicate a need for honoring one another within the company. There is a call for an environment with participation as its norm as depicted by **accountability** and **teamwork**. The value of **long-term perspective** shows a desire for a vision or defined direction for the future.
- HEALTH INDEX: PL = 10-0  
All positive values. Represents a culture that would not be driven by fear.
- BALANCE INDEX: IROS 0-5-5-0  
Balance of values shows a dramatic shift from limiting “relationship” values to positive ones while holding a continued, strong perspective on the business.
- There are three values matches between Pat’s Personal and Desired Culture values – **accountability**, **open communication** and **respect**. This, along with how the values are plotted on the Seven Levels of Consciousness, shows close alignment between her Personal and Desired Culture values.
- The values are in six of the Seven Levels of Consciousness showing a more balanced distribution. There are no values at level 5 (Internal Cohesion).

## BALANCED NEEDS SCORECARD

In the Current Culture, three of the six categories are covered – Corporate Fitness, Corporate Finance and Corporate Evolution. There are no values in the areas of Corporate Culture, Client/Supplier, and Society and Community Contribution.

The Desired Culture is much more balanced where five of the six categories are covered. This shows Pat has an excellent idea of what it takes to run a healthy business. There is strong emphasis on Corporate Culture. There are no values in the area of Society and Community Contribution.

## SUMMARY

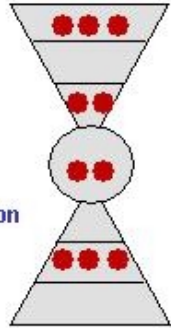
Pat’s Personal values show her to be a person with high standards who is caring and sensitive to the needs of others. Her organization focuses on making money and generating product. There is no focus on people. She would like her organization to eliminate some of its hierarchy in favor of teams, and to establish a culture where people are treated maturely and with respect. As well, she would like her company to collaborate with people outside the organization to ensure future successes.



# Pat Hollister

## Personal Values

accountability  
 compassion  
 enthusiasm  
 ethics  
 excellence  
 family  
 knowledge  
 open communication  
 respect  
 vision

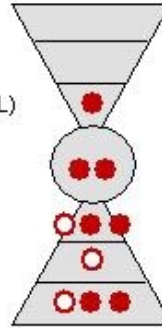


PL = 10-0  
 IRS (P) = 4-5-1  
 IRS (L) = 0-0-0

1 Match

## Current Culture Values

achievement  
 control (L)  
*financial stability*  
 internal competition (L)  
 knowledge  
 loyalty  
 power (L)  
 productivity  
 profit  
*results orientation*

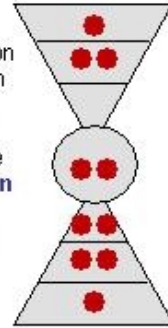


PL = 7-3  
 IROS (P) = 1-1-5-0  
 IROS (L) = 0-3-0-0

2 Matches

## Desired Culture Values

accountability  
 customer collaboration  
 Employee recognition  
 external partnering  
*financial stability*  
 long-term perspective  
 open communication  
 respect  
*results orientation*  
 teamwork



PL = 10-0  
 IROS (P) = 0-5-5-0  
 IROS (L) = 0-0-0-0

3 Matches

Underline = PV & CC match  
*Red* = PV, CC & DC match  
*Red* = CC & DC match  
 Blue = PV & DC match

**LEGEND**  
 P = Positive  
 L = Potentially Limiting  
 (hollow dots)

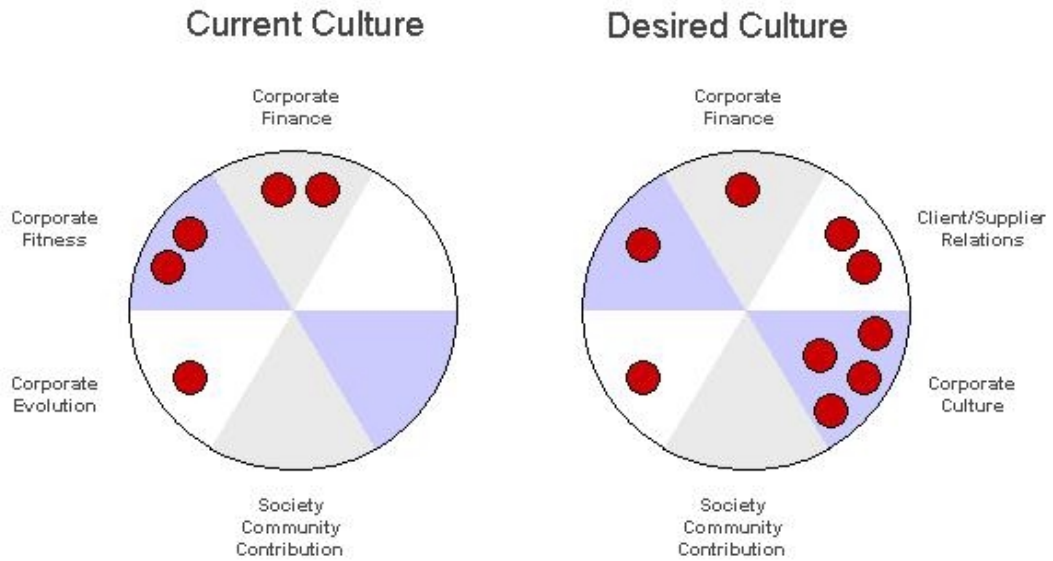
I = Individual  
 R = Relationship  
 O = Organizational  
 S = Societal

1



# Pat Hollister

## BALANCED NEEDS SCORECARD



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