

IDI

INDIVIDUAL DIRECTIONS INVENTORY™

IDI Team Development Report



Prepared for :

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Management Research Group



Introduction

Welcome to the Individual Directions Inventory™ Team Report from Management Research Group®.

The Individual Directions Inventory™ (IDI) is a tool for personal and professional development that provides you with the opportunity to explore your motivations and preferences, examine how these may have affected the choices you have made in different areas of your life, and consider what actions you might wish to take as you look toward your future. The IDI provides information about areas from which you are presently gaining satisfaction, as well as identifying areas which you may find less appealing.

The **IDI Team Report** provides insights and observations that add to those already provided by your individual IDI Development Report. Every person has their own set of motivation drivers; they reflect part of the uniqueness of every individual and the way in which they are likely to experience their world. These drivers originate from our early years and evolve slowly over time based on life stage, personal and professional experience, and others factors that shape and evolve what feels most personally rewarding and relevant at any stage of our life journey.

There are no rights and wrongs when it comes to personal motivation. Team members whose scores are different than yours are neither better nor worse than you, they are simply different from you. The objective is to understand and appreciate those differences, to grow and maintain your self-awareness and your objective observation of others, and to make better behavioral choices in pursuit of positive relationships and team objectives.

An important area of focus in this report is on potential areas of bias. As much as we might believe that we are objective in our views, bias is an entirely natural phenomenon that creates a very unique lens through which any of us view and experience our world. Understanding potential areas of bias, both at the individual and team level, can help to inform and influence the degree to which the team can deepen their understanding and appreciation of each other, thus helping team members to understand how to make each other feel more completely understood, supported and respected.

AFFILIATING

Giving: Gaining satisfaction from relating to others by providing them with support, affection, and empathy.

Receiving: Gaining satisfaction from relating to others in order to receive support, affection, and empathy from them.

Belonging: Gaining satisfaction from relating to others in groups and developing mutual bonds of loyalty, cooperation, and friendship.

Expressing: Gaining satisfaction from relating to others by expressing oneself in a direct, spontaneous, and emotionally uninhibited fashion.

ATTRACTING

Gaining Stature: Gaining satisfaction from obtaining social rewards such as recognition, status and respect as the result of social skills, achievements and/or activities.

Entertaining: Gaining satisfaction from obtaining social rewards such as admiration and visibility by using personal charisma and talent to enliven situations and entertain people.

PERCEIVING

Creating: Gaining satisfaction from being imaginative and original and perceiving one's world in an innovative and creative manner.

Interpreting: Gaining satisfaction from seeking intellectual stimulation and perceiving one's world in a logical, analytical and non-emotional manner.

MASTERING

Excelling: Gaining satisfaction from constantly challenging oneself and pushing for the highest levels of achievement.

Enduring: Gaining satisfaction from demonstrating persistence, determination and tenacity.

Structuring: Gaining satisfaction from controlling one's environment through the use of organization, precision and thoroughness.

CHALLENGING

Maneuvering: Gaining satisfaction from actively seeking and pursuing opportunities in the environment and turning them to one's advantage.

Winning: Gaining satisfaction from acting in a forceful, aggressive and directly competitive manner in order to win.

Controlling: Gaining satisfaction from being in charge, having power and authority, influencing and controlling people and events.

MAINTAINING

Stability: Gaining satisfaction from maintaining a predictable, safe and consistent environment.

Independence: Gaining satisfaction from being self-reliant and staying free of external controls on personal autonomy.

Irreproachability: Gaining satisfaction from ascribing to and striving towards ideal behavior and a personal code which places one beyond reproach.

Team Members included in this report data:

- Christian C. Sample (CC)
- Candy Halmes (CH)
- James Lotter (JL)
- Daniel Jackright (DJ)
- Robert Koffer (RK)

To help you understand your feedback, scores have been compared to a large normative database of business and professional people who have completed the Individual Directions Inventory™. You will see scores expressed in percentiles. The specific norms that have been used in this report are:

Normative Groups: North America n=18532 (Nov2017)

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Personal Motivation and Biases



While you have previously taken time to explore your personal IDI profile in-depth, this section is intended to both be a refresher as well as give you the opportunity to reflect on both the positive contributions your energy may bring to the team in addition to the potential biases you may have that also influence your participation in the team.

This section is divided into three parts:

Your IDI Profile: Likely already familiar to you, your personal IDI profile is presented in full in this section.

Narrative Profile Description: This presents the 17 IDI variables in your profile using clear narrative descriptions.

Potential Personal Biases: Based on your IDI profile, a list of potential biases is presented for you to review and to identify those biases you think apply to you.

Your Personal Individual Directions Inventory™ Profile



Affiliating

LOW					LOW-MID			MID-RANGE				HI-MID			HIGH					
5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	96+	



Attracting

LOW					LOW-MID			MID-RANGE				HI-MID			HIGH					
5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	96+	



Perceiving

LOW					LOW-MID			MID-RANGE				HI-MID			HIGH					
5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	96+	



Mastering

LOW					LOW-MID			MID-RANGE				HI-MID			HIGH					
5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	96+	



Challenging

LOW					LOW-MID			MID-RANGE				HI-MID			HIGH					
5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	96+	



Maintaining

LOW					LOW-MID			MID-RANGE				HI-MID			HIGH					
5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	96+	

You have more personal energy for:

- Achieving at the highest level; being ambitious; setting challenging goals; having very high aspirations; demanding the best out of self and others
- Being socially skilled, experiencing recognition and respect, being well-known and esteemed by others
- Having charisma; livening up situations, showing off talents; being highly visible and entertaining, and making people laugh
- Sharing and showing feelings, and being emotionally spontaneous and expressive
- Staying one step ahead, keeping options open, changing direction rapidly, exploiting/taking advantage of opportunities, figuring out other peoples' angles
- Taking a rational approach, analyzing and understanding why, exercising the mind, being a logical thinker, and being stimulated intellectually

You have moderate personal energy for:

- Accepting and appreciating help, support, affection, and generosity
- Being efficient, organized and thorough, seeking perfection, attending to details, being meticulous and orderly
- Being self-sufficient and self-reliant, having freedom from interference, ensuring there is little dependence on others
- Providing comfort and being supportive, caring, sympathetic, helpful and generous
- Thinking in original ways being an innovator, highly creative and imaginative; exploring offbeat perspectives and doing new things

You have less personal energy for:

- Being accepted by a group, working as a team, expressing loyalty and being in partnership
- Being influential, taking command/control, being in charge, leading, holding power
- Being persistent and tenacious, showing determination, demonstrating willpower and stamina
- Ensuring predictability and consistency, seeking security, being cautious, taking steady, solid courses of action
- Having a strong desire to win, competing, being triumphant and forceful, and hating to lose
- Having absolute certainty about personal principles, being beyond reproach, always doing the right thing, attempting to never be in the wrong

Potential Personal Bias to Consider

It's worth mentioning that:

- The data points below are descriptive - it's not about being better or worse than others, just different.
- Biases are completely normal and do not indicate an "issue", but they can create different expectations and perspective between people from which challenges could arise.
- The biases identified represent possibilities, but it is up to the individual to determine which they feel might be most relevant to them.

Based on your IDI Profile you may find that you have some of these biases. Please check the box for any biases you believe apply to you:

- assume that other people are comfortable having an open exchange of feelings
- interpret those who value their privacy as having something to hide
- assume that other people understand your need for positive recognition
- interpret lack of recognition as a sign of disappointment
- assume that other people are comfortable being in the limelight
- interpret those who prefer a low-key demeanour as being interpersonally disengaged
- assume that facts and evidence speak for themselves
- overestimate other people's appetite for a very considered, analytical approach
- assume that other people have a hidden agenda
- be inclined to over-interpret or misinterpret signals by reading too much between the lines
- interpret directive leaders as being somewhat "command and control" in their approach
- underestimate other people's expectations of you in terms of assuming individual responsibility and for making things happen
- assume that other people are willing to be influenced by different points of view
- interpret those with strong values and opinions as being opinionated or dogmatic

Team Motivation and Biases



This section explores key motivational preferences at the team level, identifying areas where team members are more or less likely to feel energized. All teams are likely to have diversity in how its members are motivated, but there may be a certain number of areas where the team, as a group, may have a greater or lesser collective motivational orientation.

Any strong motivational patterns can generate attraction or aversion to different types of activities and ways of engaging. These same patterns can also generate potential biases that can cause team members to sometimes make erroneous assumptions about themselves and others. In addition to exploring the team's motivational patterns, this section also provides the opportunity to examine potential biases that may be influencing team dynamics.

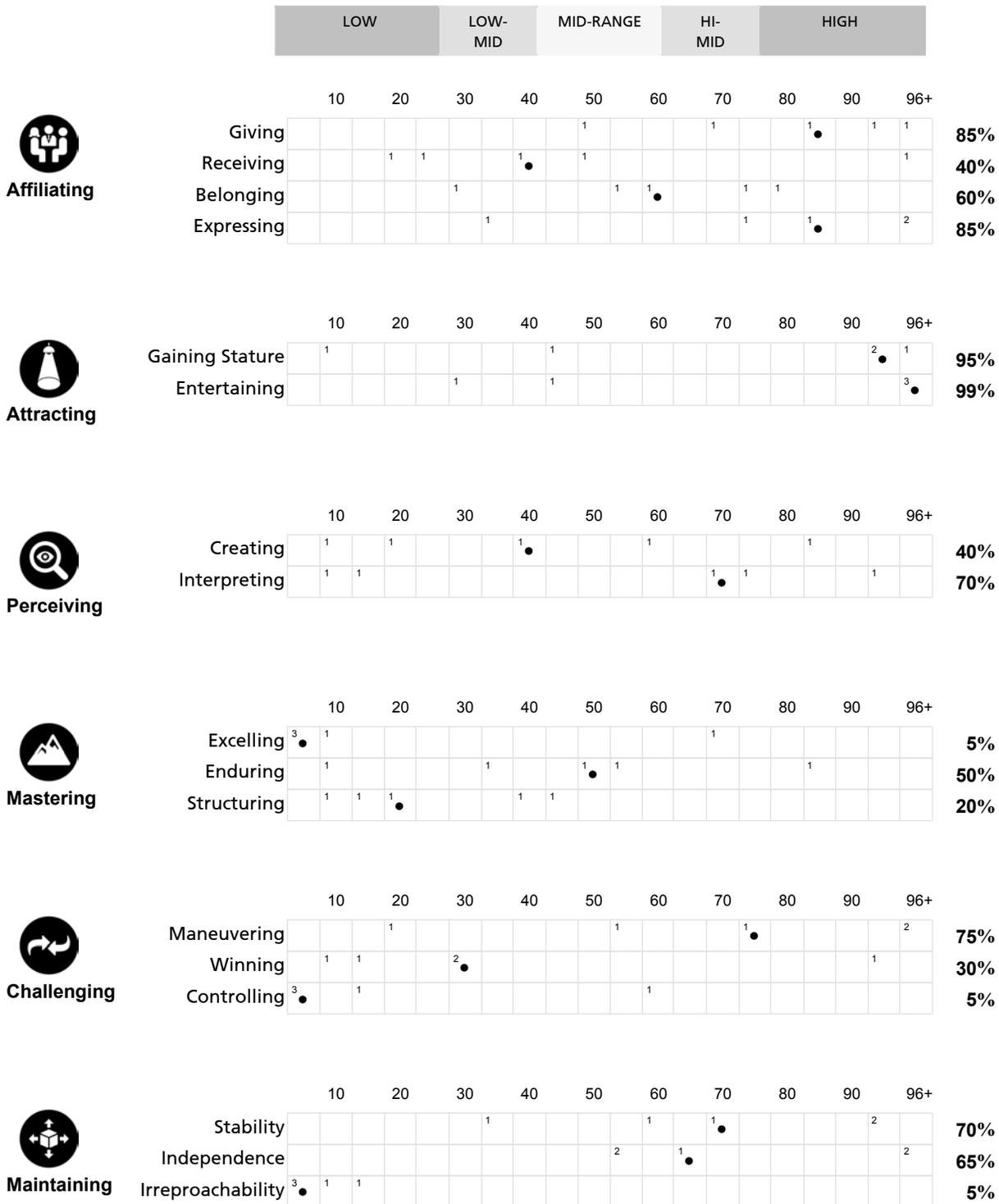
This section is divided into three parts:

The Team IDI Profile: This graph presents the IDI data for the entire team.

Narrative Profile Description: This presents the 17 IDI variables in the team profile using clear narrative descriptions.

Potential Personal Biases: Based on the team's IDI profile, a list of potential biases is presented for the team to review and to identify those biases that may be most relevant to the team.

Individual Directions Inventory™
Group Composite Profile



There are more people on this team who have more energy for:

- Being socially skilled, experiencing recognition and respect, being well-known and esteemed by others
- Ensuring predictability and consistency, seeking security, being cautious, taking steady, solid courses of action
- Having charisma; livening up situations, showing off talents; being highly visible and entertaining, and making people laugh
- Providing comfort and being supportive, caring, sympathetic, helpful and generous
- Sharing and showing feelings, and being emotionally spontaneous and expressive
- Staying one step ahead, keeping options open, changing direction rapidly, exploiting/taking advantage of opportunities, figuring out other peoples' angles
- Taking a rational approach, analyzing and understanding why, exercising the mind, being a logical thinker, and being stimulated intellectually

There is wider variation among team member energy for:

- Accepting and appreciating help, support, affection, and generosity
- Being accepted by a group, working as a team, expressing loyalty and being in partnership
- Being persistent and tenacious, showing determination, demonstrating willpower and stamina
- Being self-sufficient and self-reliant, having freedom from interference, ensuring there is little dependence on others
- Thinking in original ways being an innovator, highly creative and imaginative; exploring offbeat perspectives and doing new things

There are more people on this team who have less energy for:

- Achieving at the highest level; being ambitious; setting challenging goals; having very high aspirations; demanding the best out of self and others
- Being efficient, organized and thorough, seeking perfection, attending to details, being meticulous and orderly
- Being influential, taking command/control, being in charge, leading, holding power
- Having a strong desire to win, competing, being triumphant and forceful, and hating to lose
- Having absolute certainty about personal principles, being beyond reproach, always doing the right thing, attempting to never be in the wrong

Potential Team Bias to Consider

As a reminder:

- The data points below are descriptive - it's not about being better or worse than others, just different.
- Biases are completely normal and do not indicate an "issue", but they can create different expectations and perspective between people from which challenges could arise.
- The biases identified represent possibilities, but it is up to the team to determine which they feel might be most relevant to them.

Based on the team's IDI Profile you may find that some of these biases are present on the team. As a team please review, discuss and check the box next to any bias you believe is present among the team:

- assume that other people want or value your support
- interpret indifference to your support as a form of rejection
- assume that other people are comfortable having an open exchange of feelings
- interpret those who value their privacy as having something to hide
- assume that other people understand your need for positive recognition
- interpret lack of recognition as a sign of disappointment
- assume that other people are comfortable being in the limelight
- interpret those who prefer a low-key demeanour as being interpersonally disengaged
- assume that facts and evidence speak for themselves
- overestimate other people's appetite for a very considered, analytical approach
- assume that those who are very ambitious are too single minded
- interpret the high expectations others have for you as unreasonable
- interpret those who are thorough and process-oriented as being rigid or bureaucratic
- underestimate other people's need for order and precision
- assume that other people have a hidden agenda
- be inclined to over-interpret or misinterpret signals by reading too much between the lines
- assume that people prefer harmony and win-win outcomes
- interpret scenarios as feeling conflictual much sooner than most
- interpret directive leaders as being somewhat "command and control" in their approach
- underestimate other people's expectations of you in terms of assuming individual responsibility and for making things happen

- assume that people value predictability
- overestimate other people's need for advance notice and predictability
- assume that other people are willing to be influenced by different points of view
- interpret those with strong values and opinions as being opinionated or dogmatic

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Themes



This section of the IDI Team Report will provide team insights based on **themes** that are seen as important to the success of your team. The content related to each of the themes in this section is presented across four pages (per theme). The content for each theme is divided into the following subsections:

Theme Definition: A simple definition of the theme (ex. *Decision Making* – How team energy patterns influence what factors team members consider when assessing situations and making decisions.)

IDI Dimensions: There are five IDI dimensions that have been identified for each theme as having the most influence on how team member motivation impacts the team's approach to the theme. A brief definition of how each IDI dimension influences the theme is presented.

Team Data: For each of the five IDI dimensions, each team member's score is represented by a green dot. Your individual score is represented by a blue dot.

Processing Questions: Three specific questions are presented to facilitate discussion and exploration of the team motivation profile relative to the specific theme.

Coaching Suggestions: Multiple recommendations for how to work within the team in order to achieve success within the theme are provided.

Theme Action Planning: Several questions are presented to help the team and individual team members determine what actions are needed to improve team effectiveness with the theme.

Decision Making

How team energy patterns influence what factors team members consider when assessing situations and making decisions

Giving

The amount of energy team members have to be attuned to the human factor and sense of responsibilities toward others when making decisions



Interpreting

The amount of energy team members have to explore facts and data, and to take time for analysis in making decisions



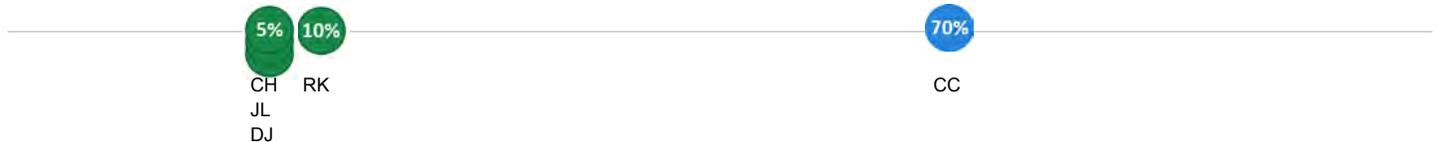
Gaining Stature

The amount of energy team members have to pay attention to how decisions will affect individual and team status



Excelling

The amount of energy team members have to make decisions based on the most ambitious and hard to achieve goals



Creating

The amount of energy team members have to make decisions based on the most creative/innovative options



"Decision Making" Team Processing Questions

What are the specific situations where our "Decision Making" energy is most important for our success as a team?

When do our "Decision Making" energy patterns serve us well?

When do our "Decision Making" energy patterns make it more challenging for us to be successful?

Team Coaching Suggestions

- Reinforce the ultimate goal(s)** - Begin with clarity about the purpose, objectives, and the desired outcome of the dialogue or decision, and let that help to define the priorities and considerations that are included in the decision-making process.

- Pay attention to the timing in decision making** - While timing cannot always be controlled, rush decisions often end up being flawed. When possible, give team members time to think about decisions in advance so everyone can be well-prepared when it is time to discuss and make a final decision.

- Establish decision-making criteria** -To ensure decisions are made effectively, clear criteria for evaluating options is critical. Often the team will need to go even further by prioritizing the decision making criteria and perhaps even establishing a scoring mechanism to aid in the evaluation process.

- Define the decision-making approach** -Different decisions will require different approaches. For example, sometimes the leader or another team member will be the ultimate decision maker, while at other times it will be appropriate to vote or to seek consensus. The team will participate more effectively when the decision-making approach is clear at the outset.

- Proactively seek input from others** - Do not assume that people will readily provide their input without specifically being sought out. Look at the issues the team has to resolve, the decisions that need to be made, and the things that need to be created, and decide where input would add the most value, and proactively contact people to ask for their input. Be specific about the type of input you are requesting.

Trust

How team energy patterns influence the inclination to be open and vulnerable

Gaining Stature

The degree to which team member energy may make the team less open and vulnerable if status is at stake



Expressing

The degree to which team member energy may make the team more open to sharing deeper thoughts and feelings



Winning

The degree to which team member energy may make the team less open and vulnerable due to internal competition



Maneuvering

The degree to which team member energy may make the team less open and vulnerable due to concerns about revealing one's position or concern about others' motives/agendas



Belonging

The degree to which team member energy may make the team more trusting due to the preference for working in a close knit team



"Trust" Team Processing Questions

What are the specific situations where our "Trust" energy is most important for our success as a team?

When do our "Trust" energy patterns serve us well?

When do our "Trust" energy patterns make it more challenging for us to be successful?

Team Coaching Suggestions

- Affirm the team's commitment to building trust** - The true measure of commitment is what the team is no longer prepared to tolerate. Remember that when it comes to trust, the "lowest common denominator" effect applies. It only takes one person undermining the effort to derail the trust agenda. To build trust, the team must be willing to challenge attitudes or behaviors that limit the level of trust within the team.

- Build a culture of transparency** - The more the team norms include being constructively open and honest, including admitting mistakes, the easier it is to build trust on the team. When there are no hidden agendas, and when members are willing to be vulnerable, it creates an environment that allows trust to grow.

- Follow through on commitments**- The better the team becomes at delivering on promises (both those made internally and to those made to people outside the team), the more members will be confident that they can rely on each other to fulfill commitments.

- Get to know each other better** - The more team members know, understand, and appreciate each other in a more holistic way, the more patient and open members are likely to be with each other.

- Avoid blaming, shaming, and aggression** - When these dynamics are present, members are likely to close down and be very wary of the intentions and outbursts of their colleagues. Trust requires that people are respectful to one another and are able to admit mistakes without fear of hostility or negative reprisals.

Change

How team energy patterns influence how the team approaches and reacts to change

Stability

The degree to which team member energy may result in a greater need for predictability and therefore some resistance to change and/or the pace of change



Creating

The degree to which team member energy may result in more enjoyment of change and the potential for new ideas change can bring



Structuring

The degree to which team member energy may bring about a need for clearly defined processes to carefully manage change



Maneuvering

The degree to which team member energy may result in an openness to change as an environment that creates more opportunities and flexibility



Excelling

The degree to which team member energy will result in the assessment of whether change is good or bad in relationship to how much it will help the team achieve ambitious goals



"Change" Team Processing Questions

What are the specific situations where our "Change" energy is most important for our success as a team?

When do our "Change" energy patterns serve us well?

When do our "Change" energy patterns make it more challenging for us to be successful?

Team Coaching Suggestions

- **Analyze before implementing** - Pause to answer key evaluative questions such as, How much does this improve what we already have? Would the most likely outcome be worth the most likely investment? What might go wrong? Is this more important than our other priorities? Ask how the team knows that a particular idea has substance versus it just being an impulse or something that may not be of value in the longer term. Be sure to welcome the input of dissenting opinions.

- **Eliminate some of the conditions that limit openness to change** - Uncover the limiting factors to change. Is it time, fear of failure, lack of partnership or support, lack of clarity around strategy or vision, too many rules, or lack of supporting technology? Take time to identify and reduce or eliminate some of the limiting factors. Take a “try and see” experimental approach; the bigger the risks, the more cautious many people will become. Reduce this potential “risk aversion” block to new ideas by implementing with a more experimental mind-set and conditions.

- **Avoid misinterpretation** - Because team members approach the exploration of change differently, it can be easy to confuse methodological differences with resistance. To avoid misunderstandings, make sure to keep discussions active and open until there is full and accurate understanding of all team members’ points of view about any individual change.

- **Aim for appropriate balance** - Define where the team needs to be between the extremes of craving change and change resistance. Determine where the team needs to be more open to change and where the team needs to be more cautious about change.

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Action Planning



You have processed several significant insights about yourself and the team. It is now time to prioritize the actions that will come from these insights. This Action Planning section and it is divided into two parts. The first part is designed to help the team create goals and actions to best use the team's motivational patterns to increase the team's effectiveness.

The second section is designed to help you create goals and actions so you are able to use your motivational patterns to best support the team's success.

Team Action Plan

- What team member motivational patterns are most important for our team's success?

- What practices and/or guidelines do we need to put in place to best support these motivational patterns?

- What team member motivational patterns may make it more challenging for the team to be successful?

- What practices and/or guidelines do we need to put into place to best manage these motivational patterns?

- Are there specific tensions in our team member motivational patterns that we need to pay extra attention to?

- What are the team bias patterns we need to be especially aware of?

- What outcomes do we expect to see if we manage our team member motivational patterns effectively ?

My Action Plan

- Which of your motivational patterns will be most helpful to the team moving forward?

- What practices and/or guidelines do you need to put in place to best support these motivational patterns?

- Which of your motivational patterns can potentially make it more challenging for the team to be successful?

- What practices and/or guidelines do you need to put into place to best manage these motivational patterns?

- What actions will you take to help manage the biases generated by your motivational patterns?

- What team member motivational patterns do you need to be especially aware of in order to work most effectively with those team members?

- What outcomes do you expect to see in both the way you engage with the team and the measurable achievements you will help the team attain if you manage your motivational patterns effectively?

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