



COLLECTIVE  
LEADERSHIP  
ASSESSMENT™  
BEST PRACTICES

LEADERSHIP  
CIRCLE.

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## CLA OVERVIEW

The Collective Leadership Assessment is an aggregated look at how a team or organisation sees itself in the current vs where they want to be in their ideal. The CLA reports will require a gap analysis that will highlight where the largest gaps (20% +) show up for each dimension in the current vs the ideal.

The complexity with CLA's is in the setup and it's crucial there's no confusion around the focus. Any confusion around the focus can compromise the data. Below are some best practices recommendations for CLA project design and setup.

### CLA Focus Options:

- Team (Inward or Outward)
- Organisation (the collective leadership of the whole organisation)

## TEAM FOCUS

**Team Focus:** A Team focus allows you to look at where a team in focus sees their collective leadership in the current vs where the team want their collective leadership to be in their desired.

**Who's Included:** For the primary team with an inward focus, all team members should be included. For the teams with an outward focus on the primary team, ideally all members are included but this is dependent on volumes.

**Team Focus Comparable Data:** It is always recommended you have comparable data for CLA's i.e., more than one circle. The reason being is because we often see significant variables with how the team sees themselves as a collective vs how they are seen by other teams. This can be due to a variety of reasons e.g.:

- A siloed team culture.
- Blind spots where they do not see the impact they are having on the broader team.
- Toxic harmony i.e., nothing to see here!
- Lack of cohesion/collaboration within the team.
- Any issues playing out are blamed on a specific team member and not addressed as a collective.

**Team Circles Example:** With multiple circles for a Team focus, you can go up, down or sideways in the business and the additional circles should be identified as key stakeholders. The team in focus will have an Inward Team focus on themselves and the other circles will have an Outward Team focus on the Team in focus. An example of what this looks like is listed below.

**Circle 1:** Executive Leadership Team n=10

**Focus:** Inward Team Focus

**Focus Question:** In this section you will be evaluating (Company Name) Executive Leadership Team

**Circle 2:** ELT's Direct Reports n=26

**Focus:** Outward Team Focus on the ELT

**Focus Question:** In this section you will be evaluating (Company Name) Executive Leadership Team as a collective

**Circle 3:** Board n=7

**Focus:** Outward Team Focus on the ELT

**Focus Question:** In this section you will be evaluating (Company Name) Executive Leadership Team as a collective

## TEAM PROJECT SETUP & MANAGEMENT

**Team Briefing Emails:** It is important participants are briefed prior to their surveys launching to ensure the focus is clear, they understand the process and are able to differentiate Section 1 in the Actual and Section 2 in the Ideal. Consultants will have their own briefing conversations with the participants, but this should be backed up by our briefing emails to reinforce the process. [CLA Briefing Emails Link](#)

**Circles:** Each circle (team) should be set up in their own project. This will ensure the reporting end is simplified with each team having their own report. Ideally you will have all members of the team included to avoid the risk of only having sample data.

**Team Project Centre Focus Questions & Section Paragraphs:** The focus question within the project has templated components, which are in bold below. The rest of the focus question will need to be manually entered when you are setting up the project. It's important that the focus question components you are manually entering into the project need to make sense to the larger templated paragraph.

**Inward Team Focus Question in the Project**

***In this section you will be evaluating*** (Company Name) (Team Name)

## **Team Project Centre Focus Questions & Section Paragraphs continued**

### **Team Focus Paragraph – Current**

#### **Current Collective Leadership**

*In this section, you will be evaluating **(Company Name) (Team Name)**. Your task is to describe the leadership behaviours that are most commonly practiced, encouraged, or allowed by leaders. There may be many factors that influence your overall experience of leadership within your organization or team. For example, two different managers have contrasting leadership styles, and both are having an influence on the collective leadership of this organization or team. Describe the behaviour that is having the most influence on your experience.*

### **Outward Team Focus Question in the Project**

*In this section you will be evaluating **(Company Name) (Team Name)** as a collective*

### **Team Focus Paragraph – Desired**

#### **Desired Collective Leadership**

*In this section, please answer the questions based on how you desire or wish the collective leadership of the **(Company Name) (Team Name)** to be. Answer each question as if the collective leadership were ideal - one that would allow it to thrive in the current and future environments.*

**Timelines:** This is dependent on the volumes per circle. CLA timelines are shorter as the participants are only completing the one survey. For smaller teams a 1 week timeline is sufficient. For larger teams a 2 week timeline should be set. Always ask the consultant to leave a healthy buffer between the projects' completion date and the scheduling of their debrief/workshop to allow for an extension as well as to give us time to create the bar charts.

**Reminders:** 2 system reminders sent out per week with a window of 2-3 days between.

**Status Updates:** Status updates should be sent out once a week to the consultant. The status should list the completion rate numbers, completion percentage, table for each circle (team), any action items such as the cadence of reminders that have gone out, as well as flagging any issues. See below example.

### Status Update Example

*Hello Mr. Bean,*

*Reminders went out on Monday and Thursday of this week.*

*Please see full status for each circle below.*

**Completion Date:** Monday 13<sup>th</sup> November

**Circle:** Executive Leadership Team n=10

**Complete:** 7

**Pending:** 3

**Percentage:** 70%

Name	Self-Survey Stats
<b>Participant 1</b>	0 of 124 questions
<b>Participant 2</b>	124 of 124 questions
<b>Participant 3</b>	124 of 124 questions
<b>Participant 4</b>	0 of 124 questions
<b>Participant 5</b>	124 of 124 questions
<b>Participant 6</b>	124 of 124 questions
<b>Participant 7</b>	0 of 124 questions
<b>Participant 8</b>	124 of 124 questions
<b>Participant 9</b>	124 of 124 questions
<b>Participant 10</b>	124 of 124 questions

**Completion Date:** Monday 13<sup>th</sup> November

**Circle:** Board n=6

**Complete:** 3

**Pending:** 3

**Percentage:** 50%

Name	Self-Survey Stats
<b>Participant 1</b>	0 of 124 questions
<b>Participant 2</b>	124 of 124 questions
<b>Participant 3</b>	0 of 124 questions
<b>Participant 4</b>	0 of 124 questions
<b>Participant 5</b>	124 of 124 questions
<b>Participant 6</b>	124 of 124 questions

**Final Status:** The final status should include the final table status for each circle, as well as a table that captures the top 10 largest gaps for each circle.

*Hello Mr. Bean,*

*These projects have been closed off, reports run, bar charts created and graphs and bar charts have been loaded into PPT slides for each circle.*

*You can access the reports, bar charts and PPT's via this link (Insert Project Center link after report is run):*

**Completion Date:** Monday 13<sup>th</sup> November

**Circle:** (Company Name) (Team Name) n=10

**Complete:** 10

**Percentage:** 100%

Name	Self-Survey Stats
Participant 1	124 of 124 questions
Participant 2	124 of 124 questions
Participant 3	124 of 124 questions
Participant 4	124 of 124 questions
Participant 5	124 of 124 questions
Participant 6	124 of 124 questions
Participant 7	124 of 124 questions
Participant 8	124 of 124 questions
Participant 9	124 of 124 questions
Participant 10	124 of 124 questions

### Top 10 Largest Gaps

Dimension	Gap %
Conservative	72
Systems Thinker	59
Courageous Authenticity	53
Achieves Results	51
Personal Learner	50
Interpersonal Intelligence	45
Customer Focus	43
Purposeful & Visionary	43
Strategic Focus	43
Pleasing	39

Repeat for the remaining circles.

**Team Completion %:** It's important to get a 100% response rate for the team with an inward focus. For the teams with an outward focus, smaller teams with 10-30 participants the ideal is to have a 100% response rate. For larger teams with more than 30 participants as close to 80% as possible is the ideal.

**Bar Charts:** Once all circles have run with a healthy completion rate, bar charts will need to be created for each report (circle). Dependent on the number of circles, ensure you leave a few days for the bar charts to be created.

#### **Recommended Windows for Team Bar Charts**

1-3 Bar Charts: 1 day

4-10 Bar Charts: 3 days



## ORGANISATIONAL FOCUS

An organisational focus allows you to look at the collective leadership of the whole organisation. The data will not only capture the top tier of leaders in the organisation, but also anyone in a leadership role, from the executive right through to team leads.

**Who's Included:** Where there's an organisational focus, it's recommended you take an all-inclusive approach and ask all staff to complete the CLA. Where only subsections of the organisation have been included, we have seen many examples of issues playing out from the people not included and general feedback has been, *'Doesn't my company think my voice is important?'*

**Organisational Focus Comparable Data:** Just like the Team focus, comparative data is highly recommended for an Organisational focus. This is generally done by each department having its own report. This will give you insight into the culture playing out in each department in the current, where each department wants to be in their desired and the impact the leaders that sit under each department are having on the collective.

## ORGANISATIONAL PROJECT SETUP & MANAGEMENT

**Internal Briefing Comms:** With higher volumes for organisational focus CLA engagements it's recommended internal briefing comms are sent out instead of these coming from us. These should be sent by a key sponsor who has influence such as the CEO (or on behalf of), Head of L&D or Head of HR. These briefing comms need to go out prior to the CLA surveys launching. [CLA Internal Briefing Emails Link](#)

**Circles:** Each department should be set up in its own project. This will simplify the reporting end. An aggregate rollup of all circles can be created after all circles have run.

**Whitelisting:** Due to the high volume of surveys being sent out where there's an organisational focus, it's important to connect with the client's IT department to ensure we are fully whitelisted. This is covered in our IT Protocols resource.

**Team Project Centre Focus Questions & Section Paragraphs:** The focus question within the project has templated components, which are in bold below. The rest of the focus question will need to be manually entered when you are setting up the project. It's important that the focus question components you are manually entering into the project need to make sense to the larger templated paragraph.

## Organisational Focus Question in the Project

*In this section you will be evaluating (Company Name)*

### Organisational Focus Paragraph - Current

*Current Collective Leadership*

*In this section, you will be evaluating **(Company Name)**. Your task is to describe the leadership behaviours that are most commonly practiced, encouraged, or allowed by leaders. There may be many factors that influence your overall experience of leadership within your organization or team. For example, two different managers have contrasting leadership styles, and both are having an influence on the collective leadership of this organization or team. Describe the behaviour that is having the most influence on your experience.*

*You will be able to review and modify your answers at the end of this section.*

### Organisational Focus Paragraph - Desired

*Desired Collective Leadership*

*In this section, please answer the questions based on how you desire or wish the collective leadership of the **(Company Name)** to be. Answer each question as if the collective leadership were ideal - one that would allow it to thrive in the current and future environments.*

*You will be able to review and modify your answers at the end of this section.*

**Timelines:** Where you have large volumes of participants completing surveys with an organisational focus, it's important to set healthy timelines. The timelines set are dependent on the size of the organisation.

50-100 staff: 1-2 weeks

100-500 staff: 2-3 weeks

500-1000 staff: 3-4 weeks

1000+ staff: 3-4 weeks

It's important to leave a healthy buffer between the project's completion date and the scheduling of the CLA debrief(s). This will allow a window for and extension if needed for a higher completion %. Bar charts for each circle will also need to be created and it's common for large CLA engagements to have 10-20 circles.

**Reminders:** 2 system reminders sent out per week with a window of 2-3 days between. In the event that the completion rate stagnates, it's recommended you ask the client to send internal escalation reminders out.

**Status Updates:** Status updates should be sent out once a week to the consultant. Because there are large volumes of participants across multiple circles, only the high level status needs to be included in the body of the email with the circle name, completion rate, pending and percentage.

**Completion Date:** (Date)

**Circle:** Department 1 n=64

**Complete:** 41

**Pending:** 23

**Percentage:** 64.06%

**Circle:** Department 2 n=35

**Complete:** 12

**Pending:** 23

**Percentage:** 34.28%

**Circle:** Department 3 n=104

**Complete:** 58

**Pending:** 46

**Percentage:** 55.76 %

**Circle:** Department 4 n=76

**Complete:** 32

**Pending:** 44

**Percentage:** 42.10%

**Circle:** Department 5 n=16

**Complete:** 12

**Pending:** 4

**Percentage:** 75%

**Circle:** Department 6 n=170

**Complete:** 98

**Pending:** 72

**Percentage:** 57.64%

**Organisation Completion %:** CLA engagements with an organisational focus have much higher volumes of participants. The % cut off should be based on the size of the company and then each of the departments. When you are looking at the volumes for the whole organisation you need to manage your expectations around a realistic completion rate. The following demographics should be factored in to determine where people may or may not complete the survey:

- Industry type
- Computer literacy
- English as the first language (we do have a high volume of survey languages)
- Time of year e.g. common holiday periods
- Casual/parttime working arrangements
- Attrition (ask if the company's CRM is up-to-date)

For smaller departments the goal is always a 100% response rate. For larger departments as close to 80% as possible and determined by the demographics.

**Bar Charts:** Once all circles have run with a healthy completion rate, bar charts will need to be created for each report (circle). Dependent on the number of circles, ensure you leave a at least a week for the bar charts to be created.

#### **Recommended Windows for Organisational Bar Charts**

5-10 Bar Charts: 3 days

11-20 Bar Charts: 1 week