Our Academy (ANZ) \_ Post Learning Experience Capability Assessment Trusted Advisor (Manager)

Start of Block: Consent and Context

One or multiple of your direct reports have just undergone a 12-week learning experience for **Consulting Excellence Part 1: Trusted Advisor Evolving.**

As a reminder the two capabilities that are in focus for the Consulting Excellence Learning Pathway as part of Our Academy are:

* **Part 1: Trusted Advisor -** Ability to proactively analyse either internal or external client needs and challenges, provide strategic and tailored advice, and build and sustain trustful and mutually beneficial partnerships through empathy.
* **Part 2: Client Delivery and Value -** Ability to develop and customise client-focused solutions, deliver them with excellence and quality and proactively identify and articulate opportunities for additional value.

To help them continue to embed and extend their learning for Part 1, we require your input on their level of capability across three behaviours, your perspective on where they should focus their development and the actions they could take to do so.  
   
Your input will be collated with your direct report/s self-assessment into a capability report. They will be asked to discuss this report with you as part of the THRIVE process and their development planning conversations.   
   
This survey should take 5 mins per direct report that has participated in the learning experience.   
     
**Data Confidentiality and Privacy, Storage and Security**   
After reading this page, you will be asked to input your email to show you consent to the outlined data confidentiality, storage, and security agreement.

**Confidentiality and Privacy**   
Raw data will not be shared outside of the authorised persons from MBS or SMEC allocated to assess responses for the development of a capability report or with managers to provide insight into their rating of capability which will be incorporated into reports. Any reports that are presented to the executive will be reported on at an aggregate level rather than individual level to ensure all information is de-identified. No raw data will be shared beyond those disclosed. If anyone outside of those disclosed wishes to access raw data, managers and learners will be informed of the request and asked for consent.

**Storage**   
Data will be stored on a shared instance of teams between the project members from SMEC/SJ and Melbourne Business School. All data entry sheets and reports will be password protected, with passwords shared in a separate format to the report, to enhance security. Data will be stored for a period of 12-18 months to support talent processes.

**Data Security**   
Melbourne Business School and SMEC/SJ are committed to data security. All reasonable endeavours to keep personal information collected, held, and used in a secure environment will be made in accordance with legislation and the Data Security and Privacy Act 2014. Our dedication to data security and privacy encompasses a proactive approach to identifying and mitigating potential risks, ensuring that personal information is protected against unauthorised access, disclosure, alteration, and destruction. We understand the trust you place in us when sharing your personal information, and we take this responsibility seriously.

This survey will take approximately 5-10 minutes to complete.

Please provide your email address to demonstrate that you have understood and consent to the above information.

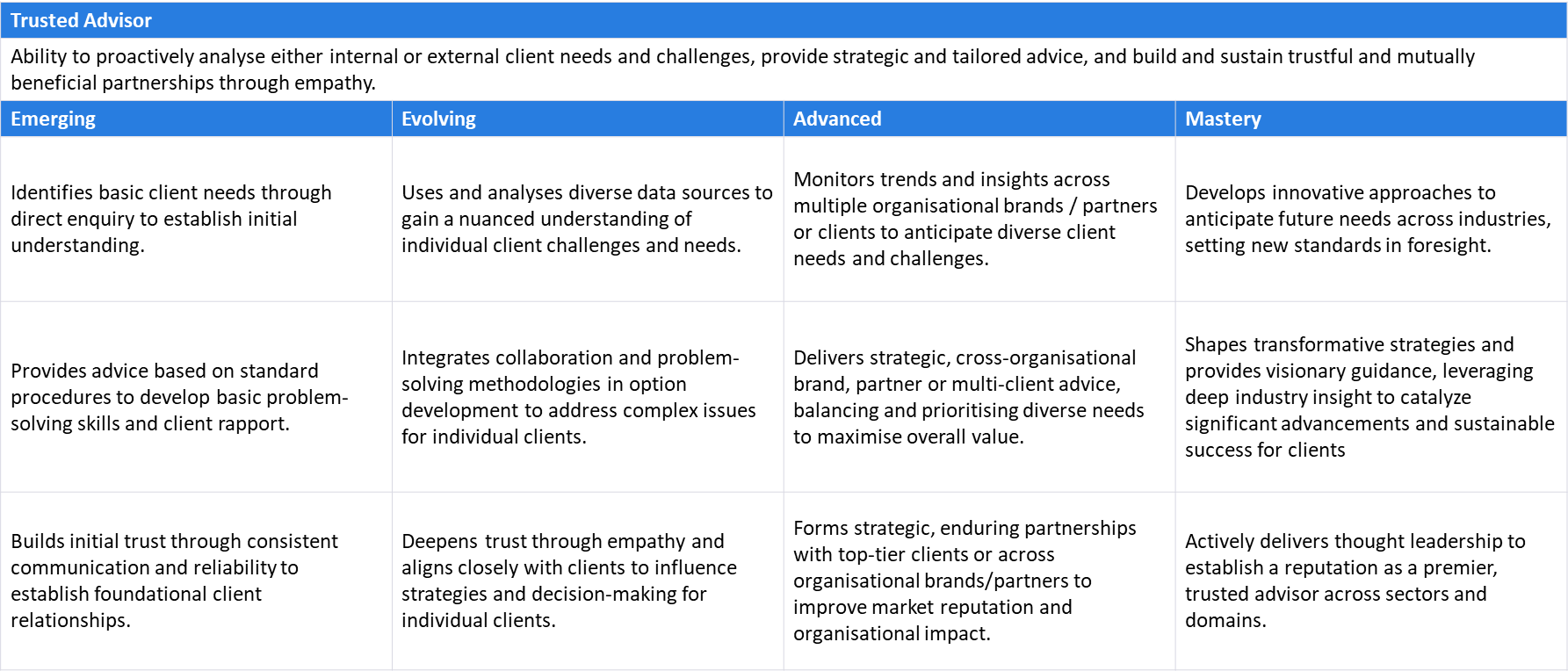
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End of Block: Consent and Context

Start of Block: Section 2: Consulting Excellence Part 1: Trusted Advisor Manager

In this section you will rate your direct report/s on the behaviours under the Evolving level of the **Consulting Excellence Part 1: Trusted Advisor** capability.

  
   
    
**Understand the qualities of a Trusted Advisor at the Evolving level**

To help bring the framework to life, your direct reports were provided the following description of Laura, an SJ ANZ team member who meets the Trusted Advisor capability at the **Evolving** level. This is the level your direct report is being assessed against.  
   
Laura is an "evolving" level trusted advisor. Laura sees her role at SJ ANZ as a consultant: she satisfies others' needs - whether an external client or internal colleague - by applying her expert problem-solving skills and always looks to understand the true nature of someone's problem. Laura is confident interpreting a project brief or request for service and identifying key aspects. She considers what data sources might be relevant to understanding the problem and seeks this data to gain a holistic understanding of others' needs. Laura knows how to learn about a client's operations and culture for a more holistic understanding of the problem. As Laura explores the problem, she asks open questions and actively listens to the other person's response.  
   
Laura's relationships with clients (internal and external) are based on empathy with individuals who she build strong relationships with. Laura supports these individuals in decision-making when providing solutions, and she asks for feedback on her solutions. Where a solution is not able to be found or requires additional expertise or input, Laura is aware of who and how to tap into our rich mix of regional and global expertise. Laura adapts her communications and approach to different clients within the boundaries of the individual project.

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**Rating Scale Description**

To help you provide your rating please see the outline below of what each rating means. When selecting a rating, consider some examples of when your direct report has demonstrated that behaviour and the consistency of that behaviour across time and scenarios.

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| **Never demonstrates the behaviour ​** | Selecting this rating suggests there is no evidence of your direct report demonstrating this behaviour. **​**  It indicates a significant opportunity for growth and development for the direct report. Or it may be that you have no visibility of your direct report demonstrating this behaviour and that a curious conversation is required to explore with your direct report. |
| **Sometimes demonstrates the behaviour** ​ | Selecting this rating suggests there is limited evidence of your direct reports ability to demonstrate this behaviour. ​  It indicates an opportunity for growth and development for the direct report. It also could be that you have limited visibility or have received limited feedback from others on your direct reports ability to demonstrate this behaviour. A curious conversation with your direct report may be required. |
| **Occasionally demonstrates the behaviour** | Selecting this rating suggests there is inconsistent evidence of your direct reports ability to demonstrate this behaviour. ​  It indicates room for further growth and development for the direct report.​  You may have evidence of them starting to demonstrate this behaviour however, feedback suggests that it is not yet consistent. |
| **Often demonstrates the behaviour** ​ | Selecting this rating suggests there is consistent evidence of your direct reports ability to demonstrate this behaviour across most scenarios. ​  It indicates that the direct report meets the expected level of mastery and can continue to stretch their development.​  It may be that they haven’t demonstrated this behaviour for a long enough time consistently yet, or that there are still unexplored or exposed scenarios in which they are yet to demonstrate this behaviour. |
| **Always demonstrates the behaviour** | Selecting this rating suggests there is strong and consistent evidence of your direct reports ability to demonstrate this behaviour across all scenarios. ​  It indicates a strength of your direct reports, and that they meet or exceed the expected level of mastery. It suggests that the direct report is ready to begin to explore the next level of mastery (i.e. Advanced) for growth opportunities.​ |

Q2.1 **Direct Report 1 <insert name>**  
  
Rate direct report 1 using the scale below on the following statement.  
  
**They are able to use and analyse diverse data sources to gain a nuanced understanding of individual client challenges and needs.**

* They never demonstrate this behaviour (1)
* They sometimes demonstrate this behaviour (2)
* They occasionally demonstrate this behaviour (3)
* They often demonstrate this behaviour (4)
* They always demonstrate this behaviour (5)

Q2.2 **Direct Report 1 <insert name>**  
  
Rate direct report 1 using the scale below on the following statement.  
  
**They are able to integrate collaboration and problem-solving methodologies in option development to address complex issues for individual clients.**

* They never demonstrate this behaviour (1)
* They sometimes demonstrate this behaviour (2)
* They occasionally demonstrate this behaviour (3)
* They often demonstrate this behaviour (4)
* They always demonstrate this behaviour (5)

Q2.3 **Direct Report 1 <insert name>**  
  
Rate direct report 1 using the scale below on the following statement.  
  
**They are able to deepen trust through empathy and alignment to a client's needs to influence strategies and decision-making.**

* They never demonstrate this behaviour (1)
* They sometimes demonstrate this behaviour (2)
* They occasionally demonstrate this behaviour (3)
* They often demonstrate this behaviour (4)
* They always demonstrate this behaviour (5)

Q2.4 **For Direct Report 1 <insert name>:** Select one or two **Consulting Excellence Part 1: Trusted Advisor Evolving** behaviours that they should focus their development on?

* Uses and analyses diverse data sources to gain a nuanced understanding of individual client challenges and needs.
* Integrates collaboration and problem-solving methodologies in option development to address complex issues for individual clients.
* Deepens trust through empathy and alignment to a client's needs to influence strategies and decision-making.

Q2.5 **For Direct Report 1 <insert name>:** Write three actions you think they should consider taking to help improve the behaviour/s you have selected for their development?

* Action 1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Action 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Action 3 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Q2.1 **Direct Report 2 <insert name>**  
  
Rate direct report 2 using the scale below on the following statement.  
  
**They are able to use and analyse diverse data sources to gain a nuanced understanding of individual client challenges and needs.**

* They never demonstrate this behaviour (1)
* They sometimes demonstrate this behaviour (2)
* They occasionally demonstrate this behaviour (3)
* They often demonstrate this behaviour (4)
* They always demonstrate this behaviour (5)

Q2.2 **Direct Report 2 <insert name>**  
  
Rate direct report 2 using the scale below on the following statement.  
  
**They are able to integrate collaboration and problem-solving methodologies in option development to address complex issues for individual clients.**

* They never demonstrate this behaviour (1)
* They sometimes demonstrate this behaviour (2)
* They occasionally demonstrate this behaviour (3)
* They often demonstrate this behaviour (4)
* They always demonstrate this behaviour (5)

Q2.3 **Direct Report 2 <insert name>**  
  
Rate direct report 2 using the scale below on the following statement.  
  
**They are able to deepen trust through empathy and alignment to a client's needs to influence strategies and decision-making.**

* They never demonstrate this behaviour (1)
* They sometimes demonstrate this behaviour (2)
* They occasionally demonstrate this behaviour (3)
* They often demonstrate this behaviour (4)
* They always demonstrate this behaviour (5)

Q2.4 **For Direct Report 2 <insert name>:** Select one or two **Consulting Excellence Part 1: Trusted Advisor Evolving** behaviours that they should focus their development on?

* Uses and analyses diverse data sources to gain a nuanced understanding of individual client challenges and needs.
* Integrates collaboration and problem-solving methodologies in option development to address complex issues for individual clients.
* Deepens trust through empathy and alignment to a client's needs to influence strategies and decision-making.

Q2.5 **For Direct Report 2 <insert name>:** Write three actions you think they should consider taking to help improve the behaviour/s you have selected for their development?

* Action 1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Action 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Action 3 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

End of Block: Section 2: Consulting Excellence Part 1: Trusted Advisor

Start of Block: Section 3: Team Performance

Q3.1 **Overall, how much did the behaviours, knowledge and skills gained from the learning experience improve team performance as perceived by the client (internal or external)?**

* Team performance did not improve (1)
* Team performance slightly improved (2)
* Team performance somewhat improved (3)
* Team performance improved (4)
* Team performance significantly improved (5)

End of Block: Section 3: Team Performance

**Thank You**

Thank you for providing your feedback and insights on one or multiple of your direct reports **Consulting Excellence Part 1: Trusted Advisor Evolving level capability.** We will collate the insights into a report and share with your direct report/s directly.  
  
As mentioned, the report and the actions identified for development should feed into the THRIVE process and development planning conversations. This is part 1/2. We will be back in touch once your direct report has completed the learning experience for **Consulting Excellence Part 2: Client Delivery and Value Evolving.   
  
Thank you for helping develop capability that is strategic to our business, clients, and people.**