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CHAPTER 1

INTRODUCTION AND OVERVIEW

This guide contains information on the purpose and various uses of the FIRO Business™ Leadership Report, an overview of its content, administration options, scoring, and guidelines on how to interpret the report. It also addresses the assumptions and logic that underlie the report, strategies and suggestions for assisting clients in understanding and making use of the content, and references to additional supporting materials.

Purpose and Use of the FIRO Business™ Leadership Report

The FIRO Business™ Leadership Report is designed to help individuals apply their FIRO Business™ assessment results to workplace situations. The report focuses on five key interpersonal elements of leadership:

- Relating to one's coworkers
- Relating to one's manager
- Relating to one's direct reports
- Handling negotiation and conflict
- Making decisions and setting priorities

These key elements apply to leaders at any level of an organization: front-line, mid-level, or senior executive.

Although leaders in today's organizations tend to rely increasingly on advanced technologies to further their objectives, the fundamentals of leadership remain grounded in successful interpersonal relations. In fact, the interpersonal foundations of leadership are reinforced by current needs for leaders to work with individuals who may not share the same geographical space, culture, or language. The FIRO Business™ Leadership Report is designed to increase leaders' awareness of their interpersonal needs, the behaviors manifested by those needs, and how those behaviors affect their role as leader.

Where and How the Leadership Report Is Used

The FIRO Business™ Leadership Report is intended for use in a variety of organizational programs in which awareness of interpersonal relations is fostered and relied on as a critical platform for leadership development. These may include formal leadership programs, on-boarding activities, training courses, coaching sessions, team-building events, conflict mediation, and organization development interventions. In each setting, use of the report must be guided by a professional qualified to interpret the FIRO Business™ assessment.*

Professionals using the FIRO Business™ Leadership Report may include

- Leadership and executive coaches
- Human resource professionals
- Trainers of professional development courses
- Counselors or advisors (e.g., career counselors and employee assistance counselors who may not be formally engaged as a leadership coach but may be asked, in the course of their services, to help clients gain insight into workplace behavior)
- Team-building and organization development consultants
- Instructors in feedback-intensive courses included in an MBA or other graduate-level curriculum
- Feedback specialists in leadership programs or assessment centers
- Mediators and negotiation specialists

Each of these roles may be performed by external consultants or by internal staff with the requisite training and experience.

Benefits and Features of the Leadership Report

The report is based on results generated by online administration of the 30-item FIRO Business assessment. This assessment is designed specifically to address the needs of organizations by focusing on improving awareness, understanding, and performance using the language of business. The FIRO Business™ Leadership Report

- Is based on the FIRO Business assessment, an easy-to-use and quick-to-administer instrument that has been shown to be reliable and valid
- Addresses key leadership issues applicable to leaders at many levels of an organization and to many different kinds of leadership roles
- Is substantive, covering a broad range of leadership issues
- Is written in everyday business language
- Identifies challenges and developmental stretches that can be integrated into ongoing leadership development activities or can be the foundation of a new leadership developmental action plan
- Can be used to help developing leaders prevent problems before they occur, diagnose current problems and suggest solutions, and identify key behaviors they may consider adding to their repertoire
- Builds on over 50 years of experience using the FIRO® model for understanding and improving human relationships

By design, the FIRO Business™ Leadership Report does not contain any of a client's scores from the FIRO Business assessment. Instead, it focuses on behavioral descriptions and the implications of those behaviors for leadership effectiveness. This user's guide, however, explains how the scales from the FIRO Business assessment are used to generate the individualized content found in the report. This material is provided to increase the understanding of the professional. It is recommended that this information not be shared with clients, as most would find it distracting or confusing.

Clients do not need to learn a new vocabulary or a theoretical framework to be able to understand their report and gain insight into their leadership style and effectiveness. In rare instances in which clients disagree with many of the descriptions presented in the report, the professional may use the FIRO Business™ Profile to show them their scores and how they affected the content of the report. The profile can be generated at any time, and, while it does involve an additional cost for report generation, readministration of the instrument is not required.

*For information on FIRO Business certification, contact CPP, Inc., or visit www.cpp.com.

Usefulness of the Leadership Report in Particular Situations. The FIRO Business™ Leadership Report can be useful in many situations, such as when clients

- Have been promoted to a leadership role in which numerous new supervisory relationships must be established
- Are assigned to a new boss or when reporting lines have been restructured
- Are interested in gaining more insight about their leadership approach in order to advance in the organization
- Face a choice between job offers with different types of work groups and different kinds of managerial styles (e.g., at the end of a management training program or when entering the job market from an MBA program)
- Have been assigned to oversee staff distributed across different locations (e.g., a virtual group or a multinational team)
- Are asked to lead a work group that is highly diverse in terms of personal background, including factors such as age, gender, ethnicity, and so on
- Must lead a cross-functional or project team with members having different functional allegiances or disciplinary backgrounds
- Are reorganizing their staff or management team

Where Caution Is Required. In some situations users of the report should proceed with caution, such as when clients

- Do not wish to participate in an online assessment, perhaps due to concerns about confidentiality of online responses (clients should be informed that responses and results are stored on a secure server)
- Are not familiar with or comfortable with technology
- Have experienced prior misuse of psychological assessments (e.g., results were shared without their permission, results were made part of their personnel record, or coworkers were allowed to demean results)
- Have been administered a number of prior assessments and, feeling overwhelmed, do not want to engage in further self-assessment at this time
- Are being pressured or forced to complete the assessment by their manager
- Have been told, or believe, that unfavorable results on the assessment, or the lack of immediate changes in behavior, will result in an unfavorable employment action (e.g., lack of promotion, job termination)
- Believe that the context for interpretation (e.g., a group session) will require them to become vulnerable to others—and, due to workplace politics, pending job actions, or other reasons, feel uncomfortable

Comparison of the FIRO Business™ and FIRO-B® Assessments

For those users switching from the *Fundamental Interpersonal Relations Orientation–Behavior* (FIRO-B®) assessment to the FIRO Business assessment, this section offers some context.

The FIRO Business™ Leadership Report provides an interpretation of clients' results from the FIRO Business assessment, which draws on the *Fundamental Interpersonal Relations Orientation™* (FIRO®) model developed by William Schutz in the late 1950s (Schutz, 1958). An extension and update to the FIRO-B assessment tool, the FIRO Business instrument is intended for use in the workplace. Technical information about the development, scoring, reliability, and validity of the instrument can be found in the *FIRO Business™ Technical Guide* (Herk, Thompson, Morris, & Schaubhut, 2009).

Key differences in the FIRO Business assessment compared to the FIRO-B assessment include

- **Reduced redundancy.** One of the aims in constructing the FIRO Business assessment

- A command of the FIRO model is required, including the advantages of high, medium, or low results on any of the scales, as well as any combination of results.
- Professionals should consciously try to avoid demonstrating bias during an interpretation due to comparison of their FIRO Business results to those of the client.
- All sections of the report should be discussed (although, as described below, there are a few exceptions, and certain sections might be emphasized given a client's issues).
- Clients should be allowed to ask questions, refute results, and reject any interpretation.

Interpretation Sessions

Interpretation of the FIRO Business™ Leadership Report can be conducted in either a one-on-one session or in a group session with multiple clients. Each setting requires somewhat different considerations.

One-on-One Sessions

If the report will be interpreted in a one-on-one, individual session, the professional interpreting the report should ensure that the setting is private and interruption-free and that adequate time is available to work through all sections of the report. A minimum of one hour should be planned for the interpretation, although more time will often be needed, especially if the client has numerous questions. Additional time will be needed if the client desires assistance in working up a developmental action plan based on the results.

The professional can introduce the session by establishing the need for interpersonal awareness in leadership (e.g., similar to arguments made for emotional intelligence or workforce engagement). Helping the client understand and apply the contents of the report will be enhanced if the professional takes the time to fully understand the client's present and past leadership experiences before interpreting the report. The effectiveness of the interpretation will be improved if the professional can relate the content in various sections of the report to actual client experiences, to current situations the client is facing, or to specific concerns about the future the client has voiced.

Some clients may prefer to read the report before the interpretation session, although this is not recommended unless one or two initial meetings have already occurred between the client and professional so that the professional has some idea as to how the client might react to the reported information. When clients are provided the report in advance, it can be useful to ask them to identify any questions about the content as they read through it and to mark those statements that seem to be on target as well as those that do not.

Group Sessions

If the interpretation session will be conducted in a group, the first issue to address is confidentiality. It should be made clear that each person's results are owned by that person and are not to be revealed to anyone outside the session without that person's express permission. With this understanding, however, a group session allows participants to compare sections of their report and explore implications of any similarities or differences for working together. Keep in mind that, given the detail and range of issues addressed in the report, one group session may be insufficient to properly cover all sections.

Note: If the FIRO Business™ Profile is being used concurrently with the report, some background on the FIRO model will be required, including an explanation of the three interpersonal needs and the types of scores available from the FIRO Business™ Profile. Coverage of this material may require 60 to 90 minutes.

Use of Each Section in the Leadership Report

In the remainder of this chapter, each section of the FIRO Business™ Leadership Report is reviewed in detail. Included are a brief explanation of the objectives and content, the basis for inclusion of the text (e.g., some requirement to successfully associate with others.

- **Be sure to inform clients that the report itself does not provide scores or numerical results** and that they can therefore focus on their behaviors rather than on numbers.
- **Take time during the interpretation to introduce the organization of the report,** using the list provided at the bottom of page 2 of the report to set the agenda for discussion. When reviewing this list, listen carefully to any comments by the client about which issues might be most important or salient at that time. You may want to jump immediately to the relevant section, as some clients may be so interested in a certain topic that they may have difficulty focusing on other topics. Table 3 suggests which section to emphasize for a particular issue. You can return to sections you've passed over later.
- **Keep in mind that in some situations it is OK to skip a section.** In general it is recommended that all sections of the report be discussed with all clients, but there may be exceptions. For example, some clients may not have any direct reports (e.g., a senior scientist in a laboratory). Other clients, such as business owners, sole proprietors, or entrepreneurs, may not have a boss. Still other clients may have severe time constraints that necessitate professional interpretation of only a few sections of the report, with the other sections relegated to independent client review. Table 4 provides some suggestions for what to say to clients about how to make the most of report sections not covered during a formal interpretation. Note, however, that such a serious time constraint might itself be indicative of how clients behave toward others and could therefore be a profitable topic of discussion.

TABLE 3. Sections to Emphasize for Clients with Concerns About Particular Issues

Client Issue	Section to Emphasize
Seeking a promotion or position transfer	Relating to Your Coworkers
Building a new set of relationships—such as when moving from one industry to another or from one region of the world to another, or when reorganization results in entirely new work groups	Relating to Your Coworkers
Entering any senior- or executive-level position from outside the organization	Relating to Your Coworkers
Receiving feedback about poor peer relationships	Relating to Your Coworkers
Observing that peers are reluctant to co-lead projects or teams	Relating to Your Coworkers
Being assigned a new manager	Relating to Your Manager
Requesting to redesign one's job duties	Relating to Your Manager
Being a "high-potential" employee with a history of poor relations with managers	Relating to Your Manager

(cont'd)