



STRATEGIC PLANNING EXERCISE (SPE 06)

EVALUATION REPORT

Candidate:
Candidate X

Evaluation date:
January 200X

Strategic Planning Exercise

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Explanation note on the type of test

The Strategic Planning Exercise evaluates a candidate's ability to comprehend a high volume of information and data presented in various formats such as reports, memos, letters, newspaper articles, etc. It also aims at evaluating a candidate's ability to understand the organization's internal and external environment, to establish strategic directions and to propose an action plan in order to resolve problems on a short-, medium- and long-term basis.

For the purposes of this exercise, the candidate will have to write a text of no longer than five (5) pages on his/her branch's strategic vision, while taking into account the internal and external environment of the organization.

Rating scale

For this report, the results are presented using the following rating scale:

Excellent 5	All major issues/criteria were addressed, answers were appropriate. Candidate surpassed your expectations.
Very good 4	Most of the major issues were addressed, no major deficiencies exist in the areas assessed. Candidate demonstrated a consistently better than average level of performance.
Good 3	Some of the major and minor issues were addressed, some deficiencies exist in the areas assessed, but none of major concern.
Weak 2	Few issues were addressed, some major deficiencies, some problems.
Poor 1	Few or no issues addressed, many deficiencies, a major problem exists. No answer or inappropriate.

Strategic Planning Exercise

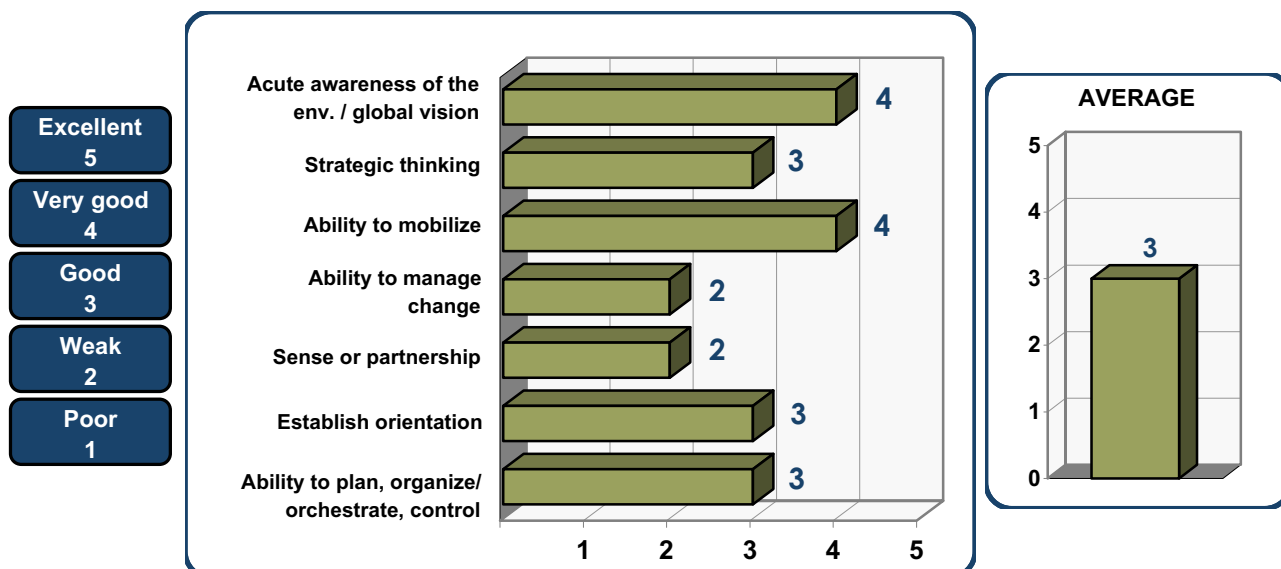
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Definition of the competencies evaluated

- **ACUTE AWARENESS OF THE ENVIRONMENT/GLOBAL VISION:** Clearly understands the issues, principles and operational modes that affect both his internal and external working environments, while knowing how to use them to ensure the well-being of the organization and the people working for it, as well as the people to whom it offers its services.
- **STRATEGIC THINKING:** Predicts trends, understands their impact and gathers significant amounts of information to form a logical whole used to establish preferred strategic directions.
- **ABILITY TO MOBILIZE:** Motivates others to commit themselves by holding them responsible for their work and by giving meaning to their work.
- **ABILITY TO MANAGE CHANGE:** Can take action and implement adequate processes to facilitate change and reduce the resistance level of people involved.
- **SENSE OF PARTNERSHIP:** Promotes the creation of partnerships with other branches or organizations while seeking cooperation and synergy.
- **ESTABLISH ORIENTATION:** Support the organisational vision, mobilize resources in order to work toward a common goal that satisfies the best interests of the organisation, its personnel and the individuals who are part of the mandate.
- **ABILITY TO PLAN, ORGANIZE/ORCHESTRATE, CONTROL:** Develops plans that take into account the time and resources available and that aim at reaching goals through mechanisms, activities or appropriate programs. Distributes resources, efficiently organizes work and takes the necessary measures to reach the goals set. Plans follow-ups or implements control mechanisms to verify the status of projects and, if required, to intervene or make the necessary adjustments.

Global results



Strategic Planning Exercise

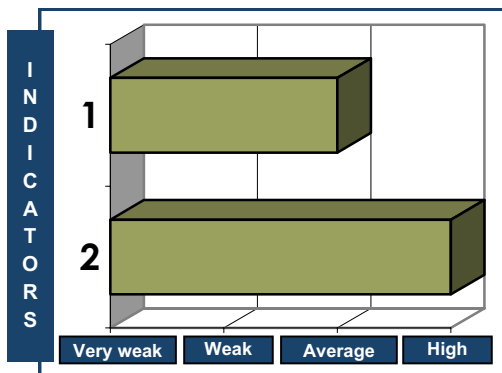
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Result per measured competency

Acute awareness of the environment / global vision

4 / 5



1 Possesses thorough knowledge of organizational practices and trends

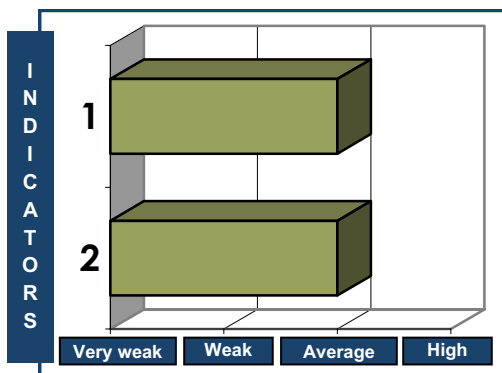
Evaluates the candidate's knowledge of the practices, trends, and facts that affect the business sector and organization, and the candidate's understanding of the principles and workings of the latter. Also evaluates the candidate's awareness of the organization's mandate, direction, and preferences.

2 Thoroughly understands internal and external environments

Evaluates the candidate's familiarity with the external environment and issues that affect the organization, and awareness of internal and external changes that impact it. Also evaluates the candidate's grasp of reasons and principles that underlie policies, practices, and procedures.

Strategic thinking

3 / 5



1 Integrates information and distinguishes between essential and non-essential elements

Evaluates how well the candidate gathers and integrates information presenting various viewpoints, in order to better understand complex questions and problems affecting the organization, identify trends or linkages between various events, and anticipate potential related organizational needs or problems. Also evaluates the candidate's ability to distinguish between critical and less critical elements by focusing on key issues that will affect the future of the organization and its customer base.

2 Organizational vision, mission, and action plan development

Evaluates how well the candidate translates a vision of the organization into goals, objectives, and significant and measurable initiatives, and recommends approaches that reflect organizational missions and objectives. Also evaluates to what extent the candidate develops an action plan that addresses the current short-term and long-term environments.

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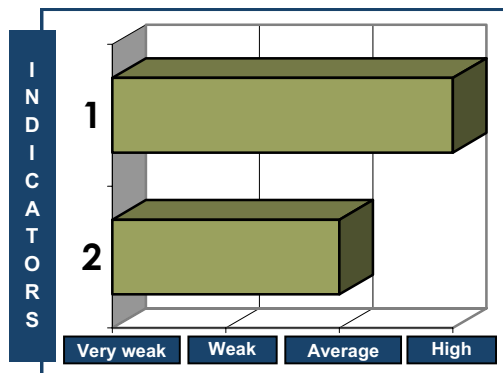
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Result per measured competency

Ability to mobilize

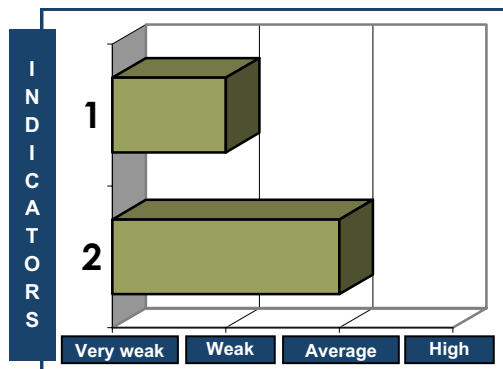
4 / 5



- 1 Employee roles, responsibilities, and accountability**
Evaluates the candidate's ability to explain to employees the roles they play in reaching organizational goals and objectives, and to delegate appropriate, achievable responsibilities to employees, making them accountable for results.
- 2 Inspires staff commitment and makes work meaningful**
Evaluates the candidate's ability to make work meaningful, share successes, and acknowledge strengths and contributions of each staff member. Also evaluates to what extent the candidate inspires commitment by setting an example and motivating internal stakeholders who will play a role in attaining objectives.

Ability to manage change

2 / 5



- 1 Understands reasons for change and related issues, and identifies potential problem**
Evaluates to what extent the candidate identifies in advance potential problems relating to change and anticipates measures needed to address them. Also evaluates the candidate's ability to understand reasons and issues underlying organizational change and recommend structured responses to facilitate its implementation.
- 2 Identifies elements and persons that resist change**
Evaluates to what extent the candidate identifies elements that block change and acts to lessen their impact. Identifies persons who resist change and attempts to help them adopt positive attitudes. Also evaluates to what extent the candidate identifies and involves persons who wish to participate in the change process.

Strategic Planning Exercise

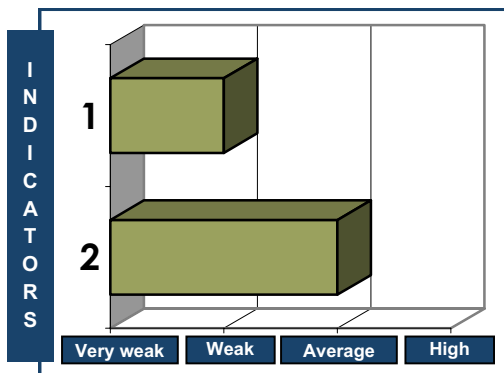
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Result per measured competency

Sense or partnership

2 / 5



1 Identifies types of collaboration and interest compatibility of partners

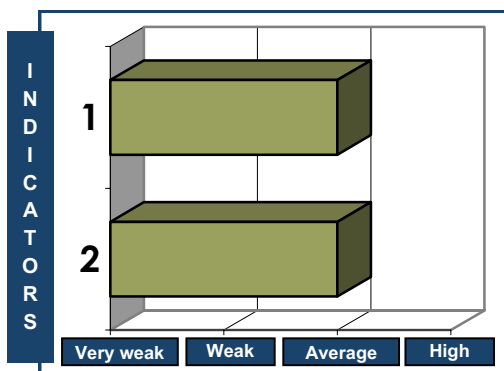
Evaluates to what extent the candidate identifies organizations or departments with whom partnerships might be established, internally and externally, and identifies the types of collaboration that will bring added value to the parties involved. Also evaluates to what extent the candidate explores partners' complementarities and interest compatibilities.

2 Develops foundations for effective partnerships

Evaluates to what extent the candidate forms partnerships based on sharing of risk, power, effort, and responsibility and seeks mutually beneficial partnerships for all involved. Also evaluates to what extent the candidate encourages partnering organizations to engage in consultation and sharing.

Establish orientation

3 / 5



1 Supports the organization's vision and defines operational milestones

Evaluates the candidate's ability to support the organization's vision and prepare it to respond to events. Also evaluates the candidate's readiness to make decisions or take positions in order to clearly define operational milestones.

2 Develops specific objectives and recommends various initiatives

Evaluates the candidate's ability to develop specific objectives and recommend various initiatives to deal effectively with all priorities.

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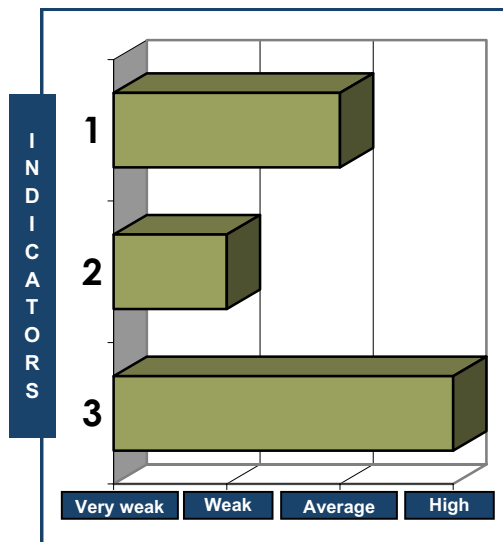
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Result per measured competency

Ability to plan, organize/orchestrate, control

3 / 5



1 Develops plans, tasks, and activities according to available time and resources

Evaluates to what extent the candidate develops plans that take into consideration available resources and time and the level of difficulty of tasks at hand. Also evaluates to what extent the candidate develops priorities for initiatives, organizes the sequence of work, makes contingency plans, and considers the opinions and needs of persons involved.

2 Assigns tasks, implements efficient working methods, and coordinates all required activities

Evaluates to what extent the candidate efficiently assigns tasks and responsibilities to involved persons, makes appropriate use of financial and material resources, and implements methods that allow objectives to be maximized. Also evaluates to what extent the candidate coordinates all required activities and circulates information so it is always accessible.

3 Establishes schedules, measures results against plan, and audits the progress of work in process

Evaluates to what extent the candidate establishes implementation schedules for jobs in process and measures results against plan. Also evaluates to what extent the candidate uses appropriate audit procedures and techniques to monitor progress of work in process, in order to make necessary modifications.