

## **Consult (Mid to Senior) Success Profile Assessment**

*Individuals in this role are accountable for defining and completing work (in full partnership with the client) that helps the client meet individual and business performance goals*

The following Self-Assessment gives you the opportunity to rate yourself on the Consult (Mid to Senior) Success Profile. It is meant to give you a snapshot of your current strengths and help you focus on opportunities for improvement.

Complete the following Self-Assessment to conduct a thorough assessment of your strengths and self improvement needs. Rate your perception of how frequently you demonstrate the outstanding behaviors associated with the competencies. For a full description of the behaviors, refer to the Consult Success Profile document.

Once you have completed the self-assessment, determine two or three key areas for development based on your self-assessment (You may also use any other feedback you have received from your manager, team members, or from a feedback tool.) Focus on the behaviors that you rated as "occasionally" and "rarely or never."

If you'd like a more in-depth assessment, talk to your Human Resources Consultant about the value of going through Wells Fargo's INSIGHTS multi-rater assessment process.

Work with your manager and/or your local Learning & Development to put together your development objectives and a plan to support those objectives.

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<b>Strategic Business Thinking</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I help the client see how their issues relate to the bigger strategic picture of emerging trends in the company, industry, and technology					
I help the client translate the vision, (e.g., What does it look like to be the premiere financial services provider in markets we serve?) into opportunities for specific improvements.					
I analyze trends both in and outside of the financial services industry, and identify new opportunities for Wells Fargo to seize competitive advantage.					
I frame complex issues in ways that help the client see the connection to business strategy.					
I ask broad, thought-provoking questions that help the client see powerful new strategic opportunities					
I identify good leverage points to target in work processes, in order to improve business results.					

<b>Applies Diagnostic Insight</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I design and implement effective research processes to assess the client's situation.					
I gather information from different and varied sources to clarify a complex situation.					
I quickly identify and focus on the central issues in a complex situation.					
I stimulate creative thinking by using effective methods, models and tools.					
I add new, project-specific questions to standard diagnostic questions sets, to reveal deeper insights.					

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<b>Leverages Expertise</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I identify useful ways to translate principles, theories and models into action.					
I use professional expertise to identify solutions that best meet the client's business needs, rather than promoting a solution that may be more than is needed.					
I lead the client to feel they have solved the problem rather than the "experts."					
I distill and package information in ways that enable the client to understand it and appreciate its importance.					
I foster the client's independence by providing a set of tools and methods, and ensuring that the client will be able to use these in the future.					
On an ongoing basis, I provide the client with additional knowledge, tools and methodologies that will add value.					
<b>Drive for Learning</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I keep my professional knowledge up-to-date through a variety of means (e.g., reading, networking with professionals, attending professional classes, workshops and conferences, and benchmarking best practices).					
I keep current on my business organization — its structure, work processes, transaction flows, links to other parts of Wells Fargo, customer mix, financial dynamics, and ways of creating value for the shareholders.					
I ask for candid client feedback both during and after the work.					
I listen to and accept client feedback.					
I help the client implement a process to regularly review the stream of information, ideas and initiatives, in order to identify new opportunities for improvement.					
I initiate discussions with the client to reflect on the consulting experience and identify lessons learned.					
I help the client share what they have learned, across the organization.					

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### Engages People

	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I build interest and credibility, when meeting with potential clients to discuss consulting services and potential projects.					
I initiate or facilitate discussions and group processes (e.g., brainstorming, debates) that lead to fresh insights and breakthrough ideas.					
I facilitate efficient and effective group participation in thinking and decision-making.					
I adjust my influence style, by deciding whether to prescribe a solution or to help the client discover their own solution.					
I adjust my language, style, and examples to fit the needs of the audience.					
I respond effectively to subtle verbal and nonverbal clues about people's feelings and level of engagement.					

### Collaborates

	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I build strong, trusting relationships with the client.					
I strengthen the partnership with the client by influencing the client to provide talented committed people to the consulting work.					
I demonstrate willingness to involve the client as an equal, fully participating partner in the consulting work from start to finish, when this is the client's preference.					
I effectively address conflicts, misunderstandings and disagreements.					
I facilitate effective problem solving and decision making among client and consulting team members.					
I welcome participation and involvement from others, outside of the project team, who may add value to the process.					
I seek win-win (one-company) approaches that provide mutual benefit for the client and other organizations partnering to provide integrated solutions.					

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<b>Change Leadership</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I demonstrate willingness to challenge the client (e.g., to change the status quo, or to set aside limiting assumptions), to open the door to change.					
I help the client think through complex political situations, by analyzing the needs, concerns and preferences of key stakeholders and developing influence strategies to ensure the effective implementation of change.					
I demonstrate good judgment in advising the client about how much change to attempt and how quickly.					
I ensure that the client thinks through and makes necessary adjustments to the key factors that must be considered when implementing organizational change - people, skills, systems and processes.					
I help the client develop and implement an effective communication / learning plan to gain the understanding, buy-in and support of all stakeholders involved in a change effort.					

<b>Consults with a Method</b>	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I approach projects with a clear, documented consulting methodology.					
I find creative ways to adapt standard methods and approaches to the needs of a specific project.					
I select consulting methods and tools that are well-suited to the needs of the situation.					
I help the client to develop an effective set of measures to track results.					
With the client, I inspect results and compare them with the client's expectations.					

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Lead with Integrity	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I consistently model behaviors that exemplify Wells Fargo values and serve the best interests of Wells Fargo.					
I avoid any conflict of interest or the appearance of a conflict of interest.					
I demonstrate respect to others at all levels in the organization.					
I follow through on commitments to others.					
I am honest and forthright with people.					
I accept responsibility for mistakes.					
I speak up to take a principled stand, in the face of potential opposition.					

Customer Focus	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I try to view situations from the client's perspective, to better understand the client's needs, concerns and ideas.					
I demonstrate understanding and empathy for the client's frustrations and difficulties.					
I demonstrate strong personal commitment to making the client successful.					
I am accessible to the client and the client's staff.					
When appropriate, I propose solutions that involve shared accountability for the customer, across the organization.					
I create or propose performance measures that will provide the client team with feedback on their efforts to exceed customer expectations.					

Takes Accountability	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I focus the client on what they must do to make their organizations more successful.					
With the client, I negotiate challenging goals that will achieve important, value-added results for the business.					
I fulfill my responsibilities for consulting work, without taking over the client's responsibilities and the client's accountability for results.					
I persist to maintain and recover initiatives after setbacks.					

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Diversity	<i>Rarely or Never</i>	<i>Occasionally</i>	<i>Often</i>	<i>Usually</i>	<i>Almost Always</i>
I ensure that consulting projects incorporate the idea of leveraging for diversity for competitive advantage (e.g., improving results by selling to culturally diverse markets, or making better decisions by considering ideas from diverse sources).					
I facilitate group processes in ways that elicit the best that each team member has to offer, especially when the team members have diverse styles and perspectives.					
I cultivate and draw on rich sources of diverse talent (e.g., mentoring and talent review processes) to build the project team.					
I act as a role model for team members, in valuing the diversity of talents, skills and backgrounds that others bring to team efforts.					
I seek different perspectives when developing solutions.					

# Personal Learning Journal

As you are working on your development plans, you may find it useful to keep notes on what you are learning. This Personal Learning Journal template is one possible format for your thoughts and ideas.

Date:

Decision/topic/accomplishment:

What happened?

What worked well?

What didn't work well?

What would you do differently next time?

What did you learn about yourself?