

# PR

## PROGRESS REPORT



PREPARED FOR

**Roger Sample**  
August 2022

POWERED BY



**KAISER**  
leadership solutions

# Overview

## Feedback for:

**Roger Sample**

August 2022

Functional head

Business – publicly traded

Managerial experience:

18 years

Time in current job:

2 years

## Feedback from:

**20 Total Coworkers**

7 Superiors

4 Peers

6 Direct Reports

3 Others

This report provides feedback concerning your on-going development. Ratings were made on both the "degree of change" scale and the "how to improve" scale, which are shown below. For ratings on the "degree of change" scale, raters were instructed to consider any changes **since last spring**.

### Degree of Change



### How to Improve

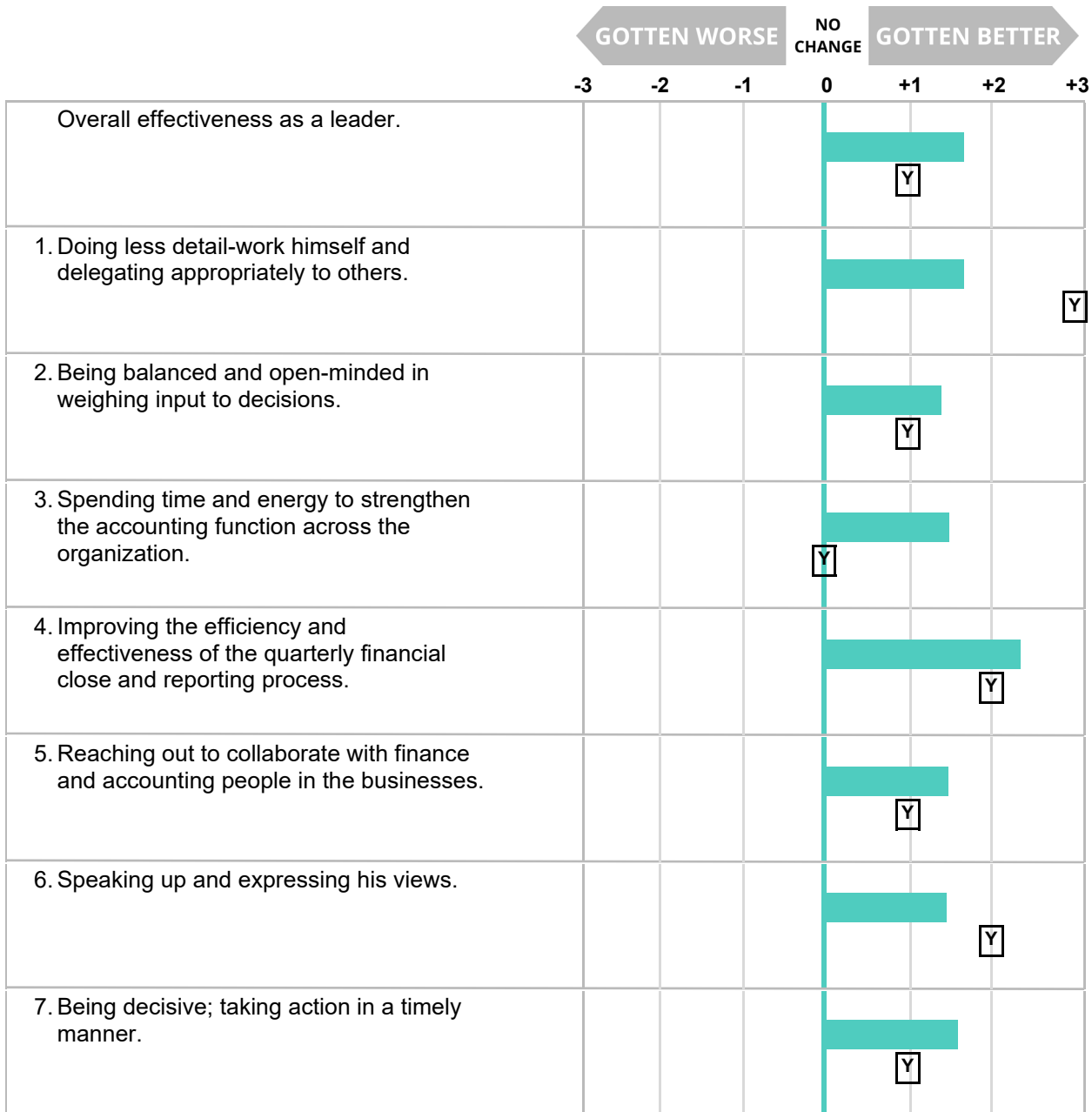


Scores are presented for each rater group, and "overall 360 scores" are presented as the average of scores across the coworker rater groups (and do not include self-ratings).

Raters were also given the option to indicate "not applicable/can't rate", and therefore there may be a different number of raters from item to item.

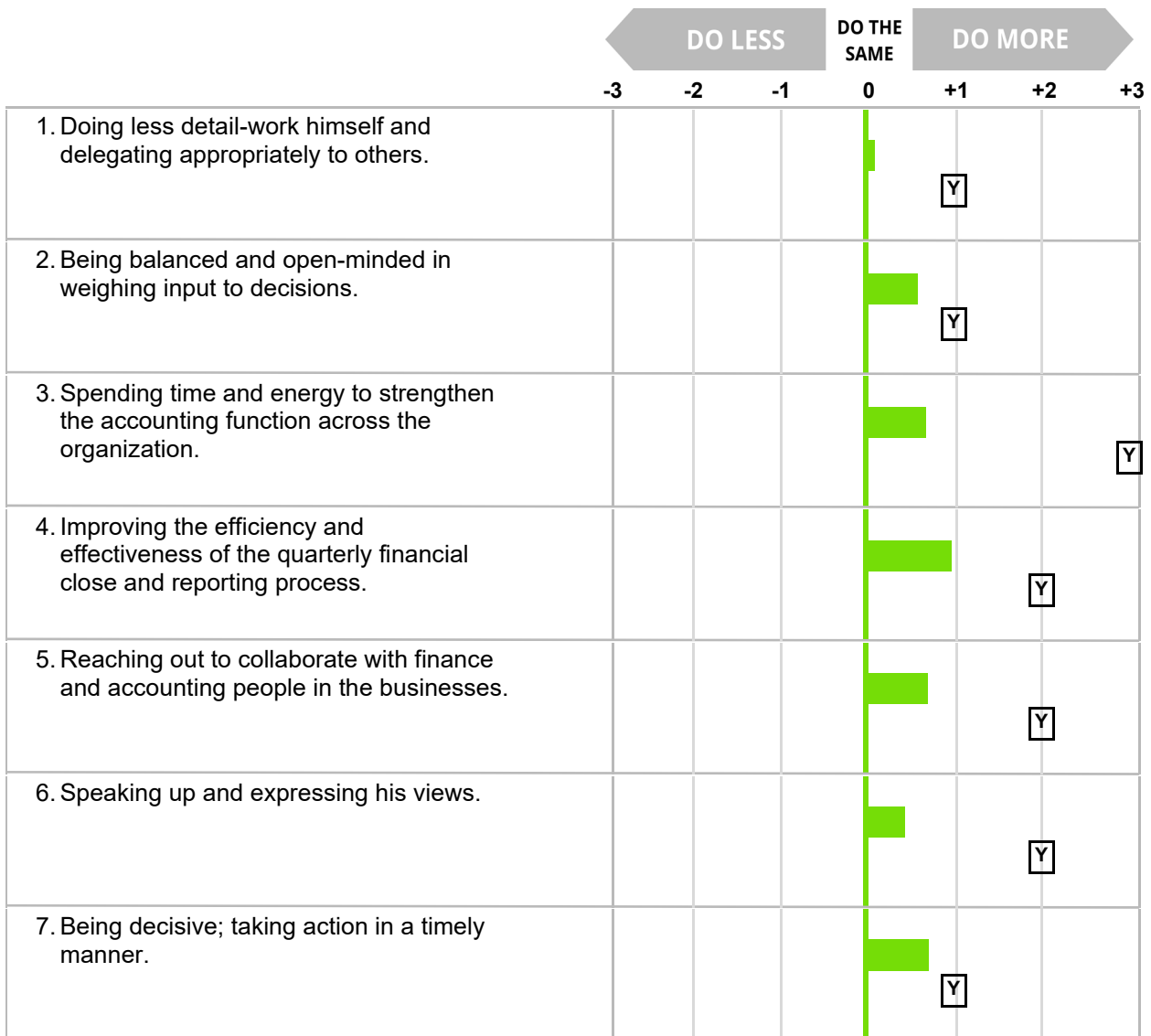
Written feedback appears at the end of the report, following the ratings.

# Degree of Change



Legend: Y = You  = Overall 360 Score

# How to Improve



**Legend:** Y = You  = Overall 360 Score

# Detailed Results

## Overall effectiveness as a leader.

	Degree of Change			
	Avg.	Worse	No Change	Better
You	+1.00			1
<b>Overall 360 Score</b>	<b>+1.67</b>		2	<b>13</b>
Superiors	+1.00		2	3
Peers	+2.33			3
Direct Reports	+2.00			4
Others	+1.33			3

### 1. Doing less detail-work himself and delegating appropriately to others.

	Degree of Change				How to Improve			
	Avg.	Worse	No Change	Better	Avg.	Do less	Do the Same	Do more
You	+3.00			1	+1.00			1
<b>Overall 360 Score</b>	<b>+1.67</b>		4	<b>12</b>	<b>+0.10</b>	<b>5</b>	<b>5</b>	<b>6</b>
Superiors	+1.00		2	4	+1.17	1	1	4
Peers	+1.50		1	3	+0.25	1	1	2
Direct Reports	+2.20		1	4	-1.00	3	2	
Others	+2.00			1	0.00		1	

### 2. Being balanced and open-minded in weighing input to decisions.

	Degree of Change				How to Improve			
	Avg.	Worse	No Change	Better	Avg.	Do less	Do the Same	Do more
You	+1.00			1	+1.00			1
<b>Overall 360 Score</b>	<b>+1.40</b>		5	<b>13</b>	<b>+0.59</b>		<b>9</b>	<b>9</b>
Superiors	+1.29		3	4	+0.71		3	4
Peers	+1.50			4	+0.75		2	2
Direct Reports	+1.80		1	4	+0.40		3	2
Others	+1.00		1	1	+0.50		1	1

# Detailed Results

### 3. Spending time and energy to strengthen the accounting function across the organization.

	Degree of Change				How to Improve			
	Avg.	Worse	No Change	Better	Avg.	Do less	Do the Same	Do more
You	0.00		1		+3.00			1
<b>Overall 360 Score</b>	<b>+1.50</b>		<b>6</b>	<b>11</b>	<b>+0.68</b>		<b>7</b>	<b>10</b>
Superiors	+1.00		3	3	+0.71		3	4
Peers	+1.25		2	2	+1.25			4
Direct Reports	+1.75		1	3	+0.25		3	1
Others	+2.00			3	+0.50		1	1

### 4. Improving the efficiency and effectiveness of the quarterly financial close and reporting process.

	Degree of Change				How to Improve			
	Avg.	Worse	No Change	Better	Avg.	Do less	Do the Same	Do more
You	+2.00			1	+2.00			1
<b>Overall 360 Score</b>	<b>+2.35</b>		<b>2</b>	<b>18</b>	<b>+0.97</b>		<b>4</b>	<b>14</b>
Superiors	+1.71		2	5	+1.29		1	6
Peers	+2.00			4	+1.50			4
Direct Reports	+3.00			6	+0.60		2	3
Others	+2.67			3	+0.50		1	1

### 5. Reaching out to collaborate with finance and accounting people in the businesses.

	Degree of Change				How to Improve			
	Avg.	Worse	No Change	Better	Avg.	Do less	Do the Same	Do more
You	+1.00			1	+2.00			1
<b>Overall 360 Score</b>	<b>+1.48</b>		<b>4</b>	<b>13</b>	<b>+0.70</b>		<b>10</b>	<b>7</b>
Superiors	+1.00		2	4	+0.83		3	3
Peers	+2.00			3	+1.75		1	3
Direct Reports	+1.60		1	4	+0.20		4	1
Others	+1.33		1	2	0.00		2	

# Detailed Results

## 6. Speaking up and expressing his views.

	Degree of Change				How to Improve			
	Avg.	Worse	No Change	Better	Avg.	Do less	Do the Same	Do more
You	+2.00			1	+2.00			1
<b>Overall 360 Score</b>	<b>+1.46</b>		5	13	<b>+0.44</b>		8	9
Superiors	+1.43		1	6	+0.86		2	5
Peers	+1.00		2	2	+0.50		2	2
Direct Reports	+1.40		2	3	+0.40		3	2
Others	+2.00			2	0.00		1	

## 7. Being decisive; taking action in a timely manner.

	Degree of Change				How to Improve			
	Avg.	Worse	No Change	Better	Avg.	Do less	Do the Same	Do more
You	+1.00			1	+1.00			1
<b>Overall 360 Score</b>	<b>+1.60</b>		4	14	<b>+0.71</b>		6	11
Superiors	+1.29		2	5	+1.29		1	6
Peers	+2.33			3	+0.67		1	2
Direct Reports	+1.80		1	4	+0.40		3	2
Others	+1.00		1	2	+0.50		1	1

# Written Feedback

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## 1. Please describe any change that you have seen in Roger Sample's leadership since last spring. What impact have the changes had on the business, the organization, or people?

**Note:** Each bullet represents a different respondent. Comments are presented *exactly* as submitted.

### You

- I am definitely delegating more detailed tasks to others in the Corporate Accounting Team, which has allowed me more time to spend on strategic and process matters, as well as time with the family.

### Superiors

- Roger seems more open to collaborative decisions and is moving his organization towards continuous improvement. He also seems more engaged in meetings and more willing to express his views.
- I don't work that closely with Roger, but I think in general, Roger does a nice job.
- Roger has continued to improve as a business leader and a manager. His opinions are well founded and his advice is respected by all. He has significantly improved the efficiency of the close process and is utilizing his team.
- Roger has presented a list of his open accounting items at a few Top Team meeting, and that review was helpful. The process of documenting and reviewing in advance with each segment is more valuable than the presentation itself. He has spent more time "walking around," and I think that even more would be welcome.
- Roger has become more effective in leading the quarterly close and reporting process -- driving appropriate time lines, more actively involving team members (and charging them with increased responsibility), and developing an effective relationship with the new lead external auditor. The result has been two very effective and efficient closes. Roger also has become more participative in group meetings, which improves the overall result, since he consistently makes good and thoughtful contributions.
- Roger does seem to provide his input to the broader group more often and more comfortably now; I think that is a positive. His leadership at Corp Finance has also been more vocal, and I think that is a positive as well. Roger is a very well respected guy, everyone knows he is unbiased and has high integrity—his words carry a lot of weight.
- Don't really have a clear line of sight to this.

### Peers

- Yes, Roger has taken a more strategic-oriented approach to the accounting function since last June. Roger has proactively managed a finance-improvement initiative across the organization to eliminate time-wasting tasks and avoid duplication of efforts. This process has already resulted in time savings in the field, which is exponentially greater than the incremental efforts previously achieved. Roger has focused his time away from the detail-oriented tasks and visited a number of Acme Corp locations to understand their challenges in meeting deadlines and to listen to their concerns. This was well received by the business units, and they appreciated seeing more of the leader of the Acme Corp controllership function than in prior years.



# Written Feedback

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## Peers

- I do see continued progress in Roger's leadership. However, this will only be effective if it is filtered down throughout his organization, specifically the openness and willingness to hear and listen. If the accounting leaders of Acme Corp feel they are constantly being audited, where only well-rehearsed discussions will be productive, then an open and transparent dialogue will not take place.
- Yes, positive change. He has clearly delegated more authority to his managers in determining potential accounting issues, potential post close items. Roger has also made a big contribution to improving the closing process. He has been very proactive in identifying areas for improvement across the finance organization; better communication of potential issues with the Segments and more timely resolution in advance of Quarter end, made great strides in eliminating duplicate work (Q&A at Quarter end) helping to reduce time to close/file 10Q.
- Roger seems to speak up more often in meetings and reviews asking questions or giving his thoughts.

## Direct Reports

- The major change I've seen since last June is his commitment to the streamlining of our close process. With the efficiency consultants team involved, he has really focused on the how/when/where/why/who of our close process. The Q3 2020 close is a testament to this. With the exception of a late tax entry, we had finalized numbers significantly earlier than usual. The overall stress/workload of the quarter was much less than past quarters as well. We only had about two weeks of long hours, and then it really leveled off, which was great.
- I have seen improvement with Roger's leadership, both within the corporate accounting team and across the larger accounting and finance organization. Specifically, within the corporate accounting team Roger has delegated more of the detail oriented tasks to his team, which allows him to focus on the larger issues as they arise or more strategic matters and also allows for development of his team. Within the greater accounting and finance organization, Roger has been focused on improving the accounting close process, which has improved the efficiency of the close process and will strengthen the accounting function across the organization.
- Roger took time to review the feedback provided to him in the prior survey and took immediate action on his development points. When he shared the feedback with the corporate accounting team and noted that several of the comments suggested that he spends too much time and effort in the details, we discussed as a team areas where he could spend less time and delegate more of the detailed work downward. We also discussed how others on the team could delegate better. Overall, this helped improve the efficiency and effectiveness of the corporate accounting team, and has resulted in Roger having more time to focus on the bigger issues and address issues more timely. Roger has also outwardly supported the efforts undertaken to reduce the number of days in our quarterly close and financial reporting process. Through his leadership and support, he has ensured that others across the entire Acme Corp organization have also supported this initiative.

# Written Feedback

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## **Direct Reports**

- The most significant difference observed is a much better focus on delegation of work to multiple levels of his organization. Such delegation is a benefit to other individuals in his organization since it fosters development (of the individuals to whom work is delegated) and similar delegating behavior within the organization below Roger (i.e. managers to whom new tasks are delegated will in turn delegate some of their existing tasks to their reports, therefore enabling learning and development of new skills throughout the group). It creates a much more effective and well developed organization, with fewer bottlenecks, more ownership and opportunity for development.
- Allowing others to take some responsibility for additional quarter end work and feels comfortable in only performing the review.
- I haven't noticed a significant change in Roger's level of delegation, but I don't view this as negative (and never have honestly—even when this was identified as a weakness of his at the beginning of his leadership project). I think Roger looks at the high risk items with the appropriate level of detail. He knows what the significant accounting risks are to Acme Corp and focuses his efforts as appropriate. I personally like that he is in the details in certain areas that I work on. I learn a lot from him and it's one of the primary reasons why I enjoy my role. I appreciate his availability and support.

## **Others**

- Roger does seek more feedback from others and his will to step outside his comfort zone.
- It has always been a pleasure to work with Roger but he has become more communicative since last June. The group works more cohesively when there is more communication.

# Written Feedback

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## 2. Is there anything Roger Sample should do differently—anything to do or emphasize more, anything to do or emphasize less—to be a more effective leader?

**Note:** Each bullet represents a different respondent. Comments are presented *exactly* as submitted.

### You

- I will continue to delegate, however, I am going to focus on delegating to a wider group of individuals both within Corporate Accounting and within the Global Finance Organization. In addition, I need to continue to focus on speaking up more and on process/strategy, as I have not progressed as rapidly in these areas of focus as I have with delegation.

### Superiors

- I think Roger has made good progress on the specific items listed in the first part of this questionnaire, and he should continue to focus on these specific items (which really are on point) since there are additional opportunities for improvement in each of these areas. In addition, from a general point of view, Roger should work to project himself more as a “senior leader” (which he really is). This doesn’t mean he needs to change his management style (which appears to be effective and to work with his team). However, at certain times, you sense that Roger remains “safe in the details” when he could be contributing more directly to larger decisions.
- Please continue to speak up and voice your opinions. You are well regarded and we appreciate it when you weigh in on topics, even those outside your area of expertise.
- I don't see any need to adjust.
- Trust your segment teams, or change them. This will be the only way to speed the close process. We have too many people that ask questions a document without adding value.
- Continue to focus on improving and streamlining the accounting processes. Continue to challenge and question in staff and Top Team meetings. Trust your team. You are a solid leader who brings great value to this management team and you are a pleasure to work with.
- Again, I don't work closely enough to Roger to comment meaningfully.
- I would suggest Roger continue the trends I have seen this year, and if he can free up more of his time by delegating down (and out to segment controllers), spend more time with segment CFO's and Presidents discussing issues and understanding their points of view proactively.

### Peers

- Continue to focus efforts on elimination of duplicate processes and positions and visit with the business units on a regular basis. Continue to delegate the monthly reporting tasks to direct reports and provide authority to the direct reports to make decisions on behalf of Corporate.
- Roger has a key role and brings a lot of knowledge and experience, an asset for Acme Corp. His job is very challenging and overall he achieves a good result. He is making a positive impact to leading improvements to the closing process.

# Written Feedback

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## Peers

- Although it is very difficult, trying to establish a better partnership with the business, more than a body you come to for permission, will go a long way. I know this is not easy, nor is it your responsibility alone. I wish I had the magic secret. Although, know that you are one of the major reasons that I joined Acme Corp and represent some of the best aspect of the organization.
- Roger has outstanding accounting talent, is highly ethical and has respect for people. He should spend more time coaching and developing other employees who could benefit from his knowledge and his personal ethics.

## Direct Reports

- I appreciate that Roger took his feedback to heart and reached out to his team to determine how best to act on the feedback. It was a group effort and has allowed us to improve our effectiveness and efficiency as a whole.
- Roger is a great leader who leads by example. He has taken this leadership development process very seriously and I have seen improvement within the areas he was focused on improving. I really appreciate his attention and efforts to continuous development, which improves the corporate accounting team's cohesiveness, as well as, the greater accounting and finance organization.
- Roger does a great job leading the Corporate Accounting function. He is one of the hardest working senior leaders of Acme Corp and his commitment to doing the right thing from an accounting perspective is invaluable to Acme Corp. He has taken his leadership development seriously and that message has been communicated to his wider team. I think we all appreciate that from him and respect that he is committed to improving. It sets a great tone at the top for us to mirror.
- To remember that he is already a good leader and that he needs to continue to develop others on his team to be good leaders as well. When he releases responsibility, it helps others to grow and allows him to get involved in new areas that will increase his knowledge and effectiveness as a leader.
- Roger does a great job of delegating to his team members (e.g., technical research and writing, coordination with business units to tackle accounting matters, etc.), which strengthens the accounting function at the Corporate level. Roger is also very receptive to the ideas and conclusions of his team, appropriately weighing their input into his final decision. This latter point is very important, as his team understands that their efforts (including their efforts related to delegated tasks and projects) are being recognized. Finally, Roger is very effective at explaining his decision-making process to his team, which helps his team better understand business and accounting risk factors and the reasons behind his ultimate conclusions. These explanations allow his team to improve the efficiency of their future tasks by helping them independently draw conclusions regarding risk and weed out issues of relative low risk. As a team, we have also made some great strides in terms of improving the efficiency and effectiveness of the quarter financial close and reporting process. For example, our Q&A was reduced from 244 questions at Q2 2020 to 118 questions at Q3 2020 (> 50% reduction in the volume of questions provided to the business units). This reduction resulted in efficiencies at the Corporate and business unit levels, and allowed our teams to focus on areas of higher risk. This reduction was the result of our team challenging its former mindset and strategy regarding quarter close, and exemplifies Roger's leadership in this area. As this efficiency effort is currently ongoing, my advice is that we continue to challenge the scope of our Q&A process by focusing on matters of higher materiality or risk. Overall, Roger is a very effective leader, and should continue his practices in the areas rated in this survey.

# Written Feedback

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## **Others**

- I would encourage Roger to continue to force change in the accounting processes and the organization. He and his organization have much improvement but continued progress can be achieved.
- Roger is superior technically and is also a good manager of people. He has tremendous potential.

# Written Feedback

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## 3. What words of encouragement do you have for Roger Sample?

**Note:** Each bullet represents a different respondent. Comments are presented *exactly* as submitted.

### You

- The increased delegation has helped personally and professionally. I have more quality time and home, and am having a bigger and bigger impact on the company. I can build off this model to have an even bigger impact in strategic change management across the Accounting function.

### Superiors

- Roger adds a lot of value, even on things outside the finance area.
- I am a huge fan of Roger. We need a dozen more just like him.
- Everyone is a supporter of Roger's. His reputation precedes him.
- Roger is a huge asset to the company.
- His increased contribution at the top team and board level is a major contribution, Keep it up!
- Trust your gut, then trust your team--or replace them.
- Step outside your comfort zone from time to time, Roger. You are on firm footing.

### Peers

- His increased strategy work is paying off big time.
- Keep speaking up and out, Roger. You have a lot to offer.
- I am seeing much more strategic agility, and that is a good thing.
- My only advice is to try to get a multiplier effect by cascading down the changes he is making in increased delegation.

### Direct Reports

- Our time to close is the fastest I have ever seen!
- I have always thought very highly of Roger. His openness to the feedback, and candidness in telling us what he was doing about it just took that up a notch. And the actions he has taken and progress made are just the cherry on top. Bravo!
- You lead by example, Roger, and it is a positive role model for all the senior players.
- Roger is an inspiration in how he responded to his feedback. It makes the rest of us want to raise our game too.
- A great functional leader learning to become a great organizational leader. Way to go!
- His hard work, dedication, and responsiveness to the feedback have earned my deepest admiration.

# Written Feedback

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## **Others**

- Roger is a true delight to work with, and appreciate his increased involvement and engagement.
- Roger, you have a lot of credit in the emotional bank account and credibility department; leverage this to drive change even further out and deeper, and everyone will be the better.