

Integrating Emotional Intelligence Competency Assessment into the MBA Curriculum to Drive Personal and Professional Development and Career Success

2009 Assessment Institute, Indianapolis

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Participant Outcomes

After this session, participants will be able to:

- Articulate the case for inclusion of emotional intelligence in an MBA program (business case).
- Define *Emotional Intelligence*.
- Describe the components of a content thread aimed at the development of emotional intelligence competencies and the related Assessment Milestones.
- Develop a graduate-level developmental assignment and/or deliverable designed around emotional intelligence competencies.

Agenda

- IU MBA Columbus Overview
- Business Case
- EI Overview
- Program Thread
- Assessment Milestones and Developmental Activities

IU MBA Columbus – Overview

- Career-integrated Indiana University MBA
- General management curriculum
- Evening program – same two evenings each week, 33 months
- Onsite in Columbus
- Cohort driven
- Tailored to south central Indiana through regional business partnerships - involvement in program design and delivery

IU MBA Columbus – Overview

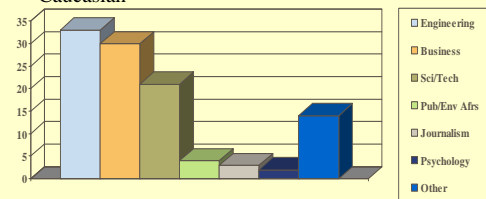
Program Components:

- Personal and Professional Development Intensives, Leadership, Career Management
- Functional Excellence
- Strategic Thinking
- Networking
- Entrepreneurship
- Civic Engagement

IU MBA Columbus – Overview

Student Mix (through 2008):

- 100 male, 34 female
- 15 India, 3 Ghana, 2 Mexico, 2 Pakistan, 2 Mexico, 1 African American and 1 each Hungary, Italy, Japan, Jordan, and Romania – 104 USA Caucasian



IU MBA Columbus – Overview

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- Agronomy/Turf Science
- Auto & Heavy Equip Mgmt
- Business (27)
- Criminal Justice (3)
- Dietetics
- Engineering (39)
- English
- Environmental Health
- FLL/Spanish
- General Studies (2)
- History
- Industrial Management (3)
- Journalism (3)
- Landscape Architecture
- Law
- Math and Stat (4)
- Nat Res & Env Sciences
- Nursing
- Organizational Leadership and Supervision (4)
- Outdoor Recreation
- Psychology (4)
- Public Administration
- Science (3)
- Sociology
- Pub/Env Affairs (2)
- Speech/Hearing
- Technology (17)

IU MBA Columbus – Overview

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- Many technical specialists interested in developing ability to work in generalist positions
- Most at first or second career milestone

Business Case

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- Business case is framed around the power of engaging employees
 - An engaged employee is a consistently high performer who is committed to the organization and willingly invests his or her energy, skill, and ability.

Business Case

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- “[P]rograms often cater to students’ interests, and most students, unlike their managerial counterparts, dislike soft skills – this puts pressure on business schools to limit such courses.”

Source: B-Schools Soft of Soft Skills,” Jane Porter, *Business Weekly*, August 2008

Business Case

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Strategic Relationship Chain

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graph LR
    LE[Leader effectiveness] --> EE[Employee engagement]
    EE --> CS[Customer satisfaction]
    CS --> BR[Business results]
    AE[Ability to: Build relationships, Create an effective work environment] --> EE
            
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SPJAC Executive Education

Business Case

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Sears, Roebuck, and Company

5-point improvement in employee attitudes led to:

- 0.5% improvement in customer satisfaction
- 0.5% improvement in revenue growth

Source: *Harvard Business Review*, January/February 1998.

Business Case

Bain & Company

Conducted a productivity study of advertising company Leo Burnett found that a 5% increase in employee retention led to:

- Productivity increase of >20%
- Profits increase of 50-100%

Source: Nancy Altrichs, *Manager of Choice*.

Business Case

Hewitt has worked with nearly 2,000 companies representing about four million employees and has established that companies with **higher engagement scores have higher total shareholder returns**. For example, companies in which 60% (or more) of the workforce is engaged have average five-year total returns to shareholders (TSR) of more than 20 percent. That compares to companies where only 40 to 60 percent of the employees are engaged, which have an average TSR of about six percent. **Organizations with higher engagement levels also tend to have lower employee turnover.**

Ray Baumruk, Hewitt Associates
Why Managers are Crucial to Increasing Engagement
 Melcrum Publishing, Ltd., 2006

Business Case

“Increasing levels of employee engagement also impacts financial performance. A 2005 Towers Perrin study equated a 5 percent increase in employee engagement to a 7 percent increase in operating margin. Another study showed correlations between the level of employee engagement and operating margin and net profit margin. Customer engagement levels correspond closely with employee engagement levels – even in cases where employees have no direct contact with customers.”

Linda Dunkel
 CEO, Interaction Associates
The Soft Staff is the Hard Staff
 Leadership Excellence, Executive Excellence Publishing

Business Case

Wilson Learning Project

Employee Satisfaction
 On average, 39% of the variability in key performance measures can be attributed to employee fulfillment/satisfaction

Leadership
 On average, 69% of the variability in employee satisfaction is attributable to the actions of the work unit leader

Source: Wilson Learning Research Project 2006.

Business Case

First, Break All The Rules, Buckingham and Coffman

Business Case

First, Break All the Rules

Employees who responded more positively to Q12 also worked in business units with higher levels of:

- Productivity
- Profit
- Retention
- Customer Satisfaction

This demonstrated the link between *employee opinion* and *business unit performance*

Source: Buckingham and Coffman, *First, Break All the Rules*.

Business Case

First, Break All the Rules

Employees ratings correlated to business units more closely than to companies, suggesting that frontline managers influenced these opinions more than company policy

Conclusion: **Frontline management** was the **most critical** component in building a strong workplace

Source: Buckingham and Coffman, *First, Break All the Rules*.

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Business Case

Since the release of *First, Break All the Rules*, Gallup has continued collecting data on employee engagement. Currently the Gallup Q12 database includes data collected in 45 languages from:

- 5.16 million employees
- 537,678 work groups
- 455 organizations
- 15 major industries
- 7 major world regions
- 124 countries

Source: <http://www.gallup.com>.

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Business Case

Saratoga Institute

During a two and one-half year period, Saratoga Institute's Retention Strategy department interviewed over 60,000 people who left their company voluntarily.

"In general we find that the principal cause of turnover is the relationship between the employee and the supervisor."

Source: Jac Fitz-Enz, The Saratoga Institute Report 1999.

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Business Case

Saratoga Institute
1-2 years' pay and benefits

Development Dimensions International
~170% of annual salary

Kwasha Lipton
150-175% of annual pay

Source: Nancy S. Ahlrichs, *Competing for Talent, Becoming An Employer of Choice*.

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Business Case

Discretionary Effort Zone

Managers become managers of choice when they capture their employees' 'heartshare', not just 'mindshare'.
Nancy S. Ahlrichs

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Business Case

"A recent Towers Perrin survey shows that just 12% of employees in the UK are highly engaged, 22% are actively disengaged and the remaining 66% describe themselves as moderately engaged. Public and private sectors match closely. There is therefore a huge performance dividend to be earned by raising the levels of engagement – engaged employees make a much bigger impact on quality, customer service, efficiency and costs than disengaged ones."

Jim Crawley, principal, Towers Perrin
Performance Link with Engagement Grows
Employee Benefits, Centaur Communications, 2007

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Business Case

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EI – Overview

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- University of Kansas, Public Management Center
- Loyola Marymount MBA Program
- North Carolina State – graduate and undergraduate programs
- University of North Carolina Charlotte – graduate and undergraduate programs
- Anderson University
- Baylor University undergraduate programs
- Etc.

EI – Overview

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- Umbrella term that captures a broad collection of skills – generally outside of the traditional cognitive area of knowledge, general intelligence, and technical/professional skills
- Fully functioning members of society possess both traditional intelligence (IQ) and emotional intelligence (EQ)
- EQ and IQ are not opposites but complementary – e.g. one's ability to handle stress affects ability to concentrate and put intelligence to use

EI – Overview

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Emotional intelligence is an array of capabilities, competencies and skills that influences one's abilities to succeed in coping with environmental demands.

Reuven Bar-On

Emotional intelligence is the capacity for recognizing our own feelings and those of others, for motivating ourselves, and for managing emotions well in ourselves and in our relationships.

Daniel Goleman

Emotional intelligence is the ability to perceive emotions, to access and generate emotions so as to assist thought, to understand emotions and emotional knowledge, and to reflectively regulate emotions so as to promote emotional and intellectual growth.

Mayer & Salovey

EI – Bar-On EQ-I®

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- EQ-i is a self report measure - assesses non-cognitive traits/behavior (i.e. emotional, social, & personal).
- It was developed in order to measure social and emotional intelligent behavior.
- Uses non-cognitive traits to measure how a person's potential for emotionally intelligent behavior is utilized. (i.e. how successful the respondent is in coping with environmental demands and provides an overview of his/her emotional well-being and how successful he/she can be in the future).

EI – Bar-On EQ-I®

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- First scientifically validated instrument to measure emotional intelligence, began development in 1980
- Tested for 17 years before release
- A way of identifying success factors
- Not an intelligence test, personality test, achievement test or a permanent reflection of your EI

EI – Bar-On EQ-I®

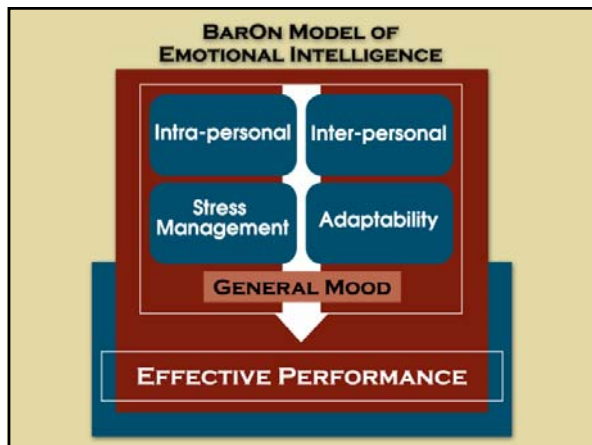
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- Dr. Reuven Bar-On, Israeli psychologist, developed the EQ-i to answer the question... “Why do some people with high IQs fail in life, while others with moderate IQs succeed?”
- Validated across culture & gender
- Used worldwide by over 1 million people
- Norm group includes 8,000+ people
- Sorts for inconsistencies

EI – Bar-On EQ-I®

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- Intrapersonal skills, *assessment of inner self*
- Interpersonal skills, *relationship capacity*
- Adaptability, *ability to go with the flow*
- Stress Management, *coping/resiliency*
- General Mood, *overall satisfaction with life*



EI – Bar-On EQ-I®

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- Offers general insight into your ability to deal with the world
- Gives you a “snapshot” of personal and social competencies
- Provides information for personal development
- Compares you against other healthy, effective individuals
- “IQ gets you hired, EQ gets you promoted.”
Goleman

Program Thread

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Program Thread:

- First Year
 - X511 – Seminar in Management (Intensive)
HR Tools for Personal Development
 - W516 – Organizational Development and Change
- Second Year
 - X511 – Seminar in Management (Intensive)
Professional Development
 - X551 – Career Management
- Third Year
 - Z511 – Human Resource Management
 - J506 – Leadership and Ethics

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Assessment Milestone 1

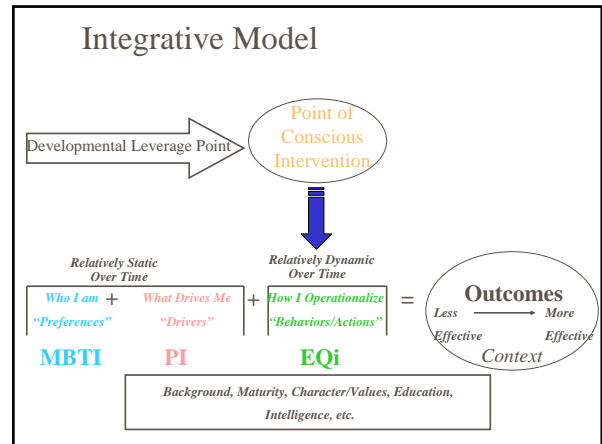
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- During the orientation to the MBA program the content thread (and supporting business case) is introduced and discussed. The students also complete the three key instruments included in the content thread: the Myers Briggs Type Indicator (MBTI), the Predictive Index (PI), and the BarOn Emotional Quotient Inventory (EQ-i).

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Assessment Milestone 2

- Early in the first semester, students attend a 1.5 Credit Hour weekend intensive entitled *HR Tools for Personal Development*. The intensive incorporates 2 instruments: the Myers Briggs Type Indicator (MBTI) and the Predictive Index (PI). The objectives for the intensive are as follows:
 - To get some experience with instrumentation that is widely used by the business community
 - To spend time exploring and prioritizing personal development as it relates to life/work objectives
 - To have an opportunity to learn together and to further integrate the group
 - To increase comfort level working with the MBA program faculty



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Assessment Milestone 2

Developmental Assignment

After reviewing the Predictive Index (PI) and the Myers Briggs Type Indicator (MBTI) information, please discuss the following:

- Generally speaking, one to three ways in which the PI and/or the MBTI might be useful in a business setting.
- One thing about *your* "profile" or "type" that could possibly serve you well in being successful in school and/or in a business setting.
- Ideas you have about how you can use this possible "strength" to your advantage.

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Assessment Milestone 2

Developmental Assignment Continued

- One thing about *your* "profile" or "type" that could possibly be a challenge for you in being successful in school and/or in a business setting.
- Ideas you have about strategies you could use so that the "challenge" doesn't get in the way of your success.

Please respond in detail, this demonstrates your critical thinking ability. Also, please begin to integrate other models, worksheets, and frameworks included in the course into your discussion of the above.

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Assessment Milestone 3

- Development of a personal Leadership Philosophy (a deliverable in the Organization Development and Change Course).
 - Use symbolism of Shackleton Expedition for context setting
 - Pulled forward at 2 other program milestones





Assessment Milestone 4

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- At approximately the ½ way point in the program, the students participate in a second weekend intensive. While building on the first weekend intensive that was focused on building self-awareness and personal development, the second intensive, *Professional Development Planning*, is designed to focus on career/professional development and to give participants:
 - increased experience with HR instrumentation that is widely used by the business community.
 - exposure to the concept of emotional intelligence.
 - time to explore and prioritize personal development as it relates to life/work objectives at the mid-point in the MBA program.
 - an understanding of the relationship between emotional intelligence and leadership and of this content thread in the MBA program.
 - an opportunity to learn together and to further integrate the group.

Assessment Milestone 4

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Specific student outcomes for the intensive are:

- Demonstrate verbally and in writing a beginning understanding of terminology, tools, and techniques relevant to emotional intelligence.
- Analyze the strengths and challenges of their own personality type, profile, and EQ as related to identified life and work challenges.
- Apply information about emotional intelligence to real-world situations.
- Identify and access a wide variety of resources related to emotional intelligence.

Assessment Milestone 4

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Developmental Assignment

- Understand Context
 - Reflect on the key work/life challenges that you will be facing over the next 12 – 18 months. Complete the left-hand column of the *EQ Challenges* worksheet.
 - Review and revise (if needed) your personal *Leadership Philosophy*.
- Assess
 - Complete the *EQ Challenges* worksheet.
 - Review your MBTI, PI, and any relevant performance feedback that you have received as a part of your job, and complete the *Other Challenges* worksheet.
- Analyze and Prioritize
 - Complete the *Strength/Importance Matrix* worksheet.
 - Review the *Strength/Importance Matrix* and identify 1–3 target competencies.

Assessment Milestone 4

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Developmental Assignment Continued

- Plan
 - Complete a *Competency Development Plan* worksheet for each of the priority competencies.
- Implement
 - Implement at least one of the developmental activities and complete a *Reflective Learning Cycle Worksheet*.
- Evaluate
 - Schedule a meeting with Dr. Joyner to review the plan and developmental activities in the context of educational and career goals.

Assessment Milestone 5

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Self Analysis of Pre- and Post-EQ-I Scores

- In the final semester of the program, as a part of the *Leadership and Ethics* course, students retake the EQ-i and complete an in-depth analysis of their pre- and post- scores. The framework for the analysis is as follows:

Assessment Milestone 5

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Developmental Assignment

- Discuss the context of the last 2 -3 years – major changes, experiences, areas of focus, etc.
- Compare the results of the two assessments. Graphs and statistical analysis can be used here. Identify changes at the overall, composite scale, and sub-scale levels.
- Provide a detailed discussion of any changes identified. What meaning do you make of the changes? Make connections to the development plan you created based on the first assessment, any work-related development activities, developmental work assignments, etc. I am looking for an in-depth discussion here.

Assessment Milestone 5

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Developmental Assignment Continued

- Discuss any meaningful connections to the key models and conceptual frameworks you have worked with during the program.
- Discuss implications of this assessment based on what is on your 1 – 3 year horizon.
- Discuss anything else that you feel is relevant.
- Make the most of this developmental opportunity.

Session Presentation Overview
Assessment Institute 2009, Indianapolis

**Integrating Emotional Intelligence Competency Assessment into the MBA Curriculum to Drive
Personal and Professional Development and Career Success**

Background – IU MBA Columbus

The IU MBA Columbus is an Indiana University MBA that has been offered on the regional campus in Columbus, Indiana for six years. It is a 45 credit general management program generally completed in 33 months. It is cohort-driven with approximately 25 students in each cohort. While delivered on-site, the program is technology-enhanced. The program is career-integrated, while most students are at their first or second career milestone, work experience varies from 1 – 33 years at admission. The students are diverse representing 15 communities of residence, 45 employers, and 65 undergraduate institutions. Due to the mix of regional employers, a significant % of students are international. Approximately 10% of the students have a previous masters degree.

The Personal Development Content Thread

Overview

The personal development content thread spans all three years of the MBA curriculum and is integrated into the following courses:

First Year

- X511 – Seminar in Management (1.5 Credit Hour Intensive)
HR Tools for Personal Development
- W516 – Organizational Development and Change (3 Credit Hours)

Second Year

- X511 – Seminar in Management (1.5 Credit Hour Intensive)
Professional Development Planning
- Z511 – Strategic Approaches to Human Resource Management (1.5 Credit Hours)

Third Year

- X551 – Career Management (1.5 Credit Hours)
- J506 – Leadership and Ethics (3 Credit Hours)

Key Assessment Milestones in the Content Thread

Assessment Milestone 1 – Orientation

During the orientation to the MBA program the content thread (and supporting business case) is introduced and discussed. The students also complete the three key instruments included in the content thread: the Myers Briggs Type Indicator (MBTI), the Predictive Index (PI), and the BarOn Emotional Quotient Inventory (EQ-i).

Assessment Milestone 2 – First Weekend Intensive: *HR Tools for Personal Development*

Early in the first semester, students attend a 1.5 Credit Hour weekend intensive entitled *HR Tools for Personal Development*. The intensive incorporates 2 instruments: the Myers Briggs Type Indicator (MBTI) and the Predictive Index (PI). The objectives for the intensive are as follows:

- To get some experience with instrumentation that is widely used by the business community
 - Personal perspective

- Other applications
- To spend time exploring and prioritizing personal development as it relates to life/work objectives
- To have an opportunity to learn together and to further integrate the group
- To increase comfort level working with the MBA program faculty

Upon participation in the weekend intensive, completion of a final deliverable provides students with an opportunity to begin synthesizing their learning as it relates to the connections between personal development and career success. The description of that deliverable is as follows:

| | |
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| <p style="text-align: center;">Assignment</p> <p>After reviewing the Predictive Index (PI) and the Myers Briggs Type Indicator (MBTI) information, please discuss the following:</p> <ol style="list-style-type: none"> 1) Generally speaking, one to three ways in | <p>Assessment Milestone 3 – Development of a Personal Leadership Philosophy</p> <p>Assessment Milestone 4 – Second Weekend Intensive: <i>Professional Development Planning</i></p> <p>At approximately the ½ way point in the program, the students participate in a second weekend intensive. While building on the first weekend intensive that was focused on building self-awareness and personal development, the second intensive, <i>Professional Development Planning</i>, is designed to focus on career/professional development and to give participants:</p> <ul style="list-style-type: none"> • increased experience with HR instrumentation that is widely used by the business community. • exposure to the concept of emotional intelligence. • time to explore and prioritize personal development as it relates to life/work objectives at the mid-point in the MBA program. • an understanding of the relationship between emotional intelligence and leadership and of this content thread in the MBA program. • an opportunity to learn together and to further integrate the group. |
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Specific student outcomes for the *Professional Development Planning* intensive are:
By the end of this course, students should be able to:

- Demonstrate verbally and in writing a beginning understanding of terminology, tools, and techniques relevant to emotional intelligence.
- Analyze the strengths and challenges of their own personality type, profile, and EQ as related to identified life and work challenges.
- Apply information about emotional intelligence to real-world situations.
- Identify and access a wide variety of resources related to emotional intelligence.

At the end of the weekend intensive, students are given the following assignment which they complete and discuss in a one-on-one coaching session with the course instructor:

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| <p style="text-align: center;">Assignment</p> <p>Understand Context</p> <ol style="list-style-type: none"> 1. Reflect on the key work/life challenges that you will be facing over the next 12 – 18 months. | <p>Assessment Milestone 5 – Self Analysis of Pre- and Post-EQ-I Scores</p> <p>In the final semester of the program, as a part of the <i>Leadership and Ethics</i> course, students retake the EQ-i and complete an in-depth</p> |
|--|---|

analysis of their pre- and post- scores. The framework for the analysis is as follows:

| |
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| <p>Assignment Pre- and Post- EQI Analysis</p> <p>In your analysis, please comment on/address the following:</p> <p>Discuss the context of the last 2 -3 years – major</p> |
|---|

This is a significant deliverable and often produces in-depth and insightful student work. An example of a student paper for this assignment is attached at the end of this document.

Companion Research Project on Program Outcomes

In order to better understand program outcomes related to this content thread, a research study has been initiated. This study uses the BarOn Emotional Intelligence Quotient (EQ-i) instrument to identify emotional intelligence competencies significantly improved through participation in the IU MBA Columbus curriculum. The BarOn Emotional Intelligence Quotient (EQ-i) is administered during the first and last semesters of the IU MBA Columbus program and statistical analysis of scores will be conducted when the sample reaches an acceptable size for analysis.

Administration Procedures

The instrument is administered at the beginning of the first semester and during the final semester of the program, during class time. The instrument is taken on-line in the computer lab. Students are also asked to complete a companion demographic information sheet. The instrument and the demographic sheet are introduced and administered by the Principal Investigator who is certified in EQ-i and trained in *EQ and You* (a curriculum designed to support the EQ-i instrument). Prior to completing the instrument and the demographic sheet, the Informed Consent Statement is reviewed, explained, and signed by participants. The purpose of the study is generally explained and linked to the goals and values of the campus and the Division of Business. Students are then encouraged to be candid, ensured of the confidentiality of their responses, and it is explained that the results will be used to help support their success.

Results Administration and Analysis

The individual reports are scored online by the Principal Investigator and downloaded. In addition to the individual reports, the EQ-i vendor will provide a “scored data set” spreadsheet containing all of the results. An administrative person will enter the demographic data into the spreadsheet and, once the demographic data is linked with the assessment results, data will be de-identified and a numbering system will be used so that the specific results cannot be linked back to a specific individual. Statistical analysis will be conducted to identify any significant shifts in EQ-i scores between the first and second administration of the instrument.

EQi COMPARATIVE ANALYSIS

J506 Leadership & Ethics
IU MBA Columbus

Introduction

As part of our MBA program at IUPUC, we were administered the EQi test at the beginning of our program and during the last semester. This comparative analysis intends to review and analyze the relative scoring changes of a single subject taking the BarOn Emotional Quotient Inventory (EQi) test over an elapsed 16 month period. The initial EQi testing occurred on 9/07/05, and the follow up test was taken on 1/22/07. EQi testing is a dynamic process and each test result is a reflection of that specific point in time.

The EQi process is intended to assist the user to first - understand what emotional intelligence is; second - determine which emotional competencies are most important at that point in life; and third - to enable increasing personal effectiveness by improving emotional intelligence. Emotional intelligence has been defined as follows:

- *Emotional intelligence is an array of capabilities, competencies and skills that influences one's abilities to succeed in coping with environmental demands and pressures. (Dr. Reuven Bar-On, Ph.D.)*
- *Emotional Intelligence is the capacity for recognizing our own feelings and those of others, for motivating ourselves, and for managing emotions well in ourselves and in our relationships. (Dr. Daniel Goleman, Ph.D.)*
- *Emotional intelligence is the ability to perceive emotions, to access and generate emotions so as to assist thought, to understand emotions and emotional knowledge, and to reflectively regulate emotions so as to promote emotional and intellectual growth. (Peter Salovey, Ph.D. and John Mayer, Ph.D.)*

The EQi project provides a process for students to better understand and manage their emotions; internalize and recognize these emotions; and finally to apply emotional management skills to external or environmental situations to improve overall performance and progression.

Analytical Context

This comparison is intended not only to analyze and understand the quantitative changes between the test scores, but to place those changes within the context of my personal and professional life experiences. Over the past 16 months, my participation in the MBA program has not only provided me with a formal educational experience, but it has also been the catalyst for many personal and professional changes (and challenges) as well. I expect that these changes should have had an effect on my EQi scores. But first a brief discussion of what has occurred over the past year and a half.

From a personal perspective, over this time period in the MBA program I have had many significant changes in my life. During this timeframe, my wife and I have been raising two young boys who were 12 and 15 when I started on the MBA program. Raising teenage children is not always smooth sailing and there have been many occasions where I have questioned my decision to use this time earning an MBA degree. It has had some negative impacts on my family such as lost quality time and even "emotional distraction" where I have not considered my family's needs first – or some times at all. One of the positive personal outcomes of my involvement with the MBA program has been the opportunity to act as a role model to show my sons that an education is a life-long process, and that success requires hard work, dedication and sacrifice.

I've also had to deal with the highly emotional and stressful situation where my father passed away just weeks before starting the program. Coupled with the recent prior death of my mother and with no surviving grandparents, this left my brother and me as "emotional orphans" (our insider term for how we felt at the time). We had lost our lifelong guidepost, our emotional safety net had been taken away, and it was not in our plans to be without this stabilizing force in our lives. We then had to deal with estate issue; legal problems; taxes; ownership; lawyers; and even hurricanes that wiped out my father's home in Florida. That first year was fraught with emotional highs and lows as my brother and I sought to reach some middle ground in our relationship with one another - where we had once been quite distant and confrontational.

Finally, my involvement with the MBA program has been very rewarding and empowering for me personally. It has taught me that I am much more capable than I had previously thought. I have become much more self-confidence (if you ignore my latest EQi scores) and my leadership skills have improved as well. My professional work has been elevated to a higher more strategic perspective. My improved management performance (and MBA chutzpah) has recently resulted in a promotion and new role within my company. Conversely, I am now also dealing with some feelings of trepidation and discomfort as I stretch myself in this new role. But change is a good thing when fully embraced, and at times has been quite liberating.

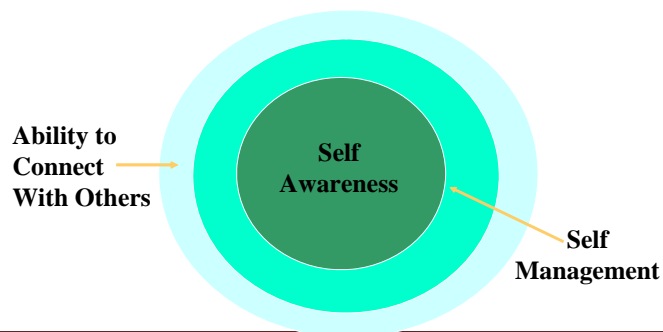
One conflicting comment to note is that at the time I was taking the second EQi test, I was quite involved with making a decision to leave my current role. I had been in that group for over 10 years and it was clearly time for a change, but still a difficult decision. I had grown dissatisfied with the level of involvement and lack of challenges, was not fully engaged, and my motivation level was quite low. My only intellectual outlet has been the MBA program, which is where I spent my mental energy and in turn received self-satisfaction. This as much as any other experience listed may have had the most significant impact to my secondary EQi test results.

Comparative Analysis

For a comparative summary of the Overall, Composite, and Sub-Scale EQi test scores, please refer to Table 1 in the appendix.

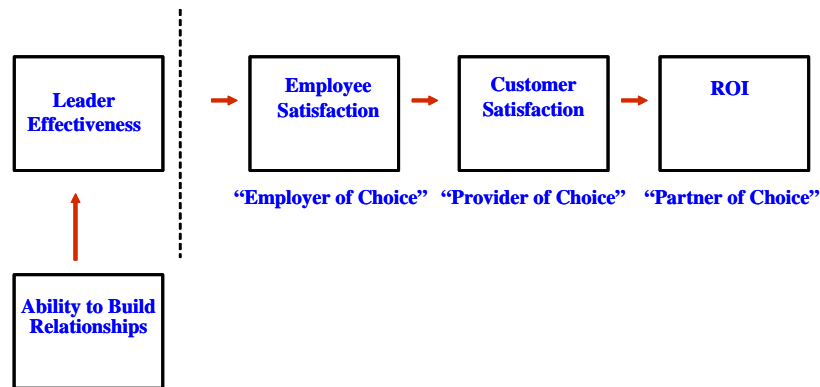
Overall Score – My total EQi rating improved eight points from a 93 to a 101. Other than highlighting an overall 9% improvement, this score simply indicates the positive trend of the EQi results. We need to analyze the results at a deeper level so we can better understand the actual drivers of the upward change. The EQi works to identify and improve our Self-Awareness, which leads to better Self-Management and ultimately to developing the ability to connect with others. Figure 1 below visually represents this outward growth model.

Figure 1



Another key perspective to reflect on at this point in analysis of the high level Summary perspective is that building relationships is critical in the development and success of a leader. As noted by Professor Joyner (see Fig 2), our ability to build these relationships is fundamental to becoming effective as leaders, and using the EQi to look inward to Self-Awareness and Self-Management (as shown in Figure 1 above), are foundational to connecting with others to begin building those relationships. A positive improvement in my EQi Total Score indicates that I am better today at looking inward and thereby improving my connections with others.

Figure 2



Composite Scales – The next lower level of the EQi analysis involves the Composite sections which include: Intrapersonal; Interpersonal; Stress Management; Adaptability; and General Mood. Shown below are the raw scores for each of these Composite sections:

| CRITERIA | 9/05 EQI | 1/07 EQI | CHANGE |
|-------------------------|----------|----------|--------|
| Composite Scales | | | |
| Intrapersonal | 97 | 98 | 1 |
| Interpersonal | 102 | 113 | 11 |
| Stress Mgmt | 88 | 96 | 8 |
| Adaptability | 87 | 96 | 9 |
| General Mood | 99 | 104 | 5 |
| Averages > | 94.60 | 101.40 | 6.80 |

Overall the Intrapersonal composite was the one area of lowest improvement, with Interpersonal showing the highest level of positive change. It is also interesting to note that even though each area had varying levels of improvement, the overall performance ranking order (1st to 5th) remained the same.

I can easily attest to the improvement in the Interpersonal, Stress Management, and Adaptability Composite areas. Two of these areas were my lowest prior scores and improvement in them shows a focused approach to EQ management. This improvement has also been noted in my annual performance reviews and through customer feedback I have received during the year. An interesting

outcome of my improvement areas has been the corresponding improvement within my department / subordinates in these same areas as well. As we have determined in our prior research on this topic, effective leadership can create a corresponding improved culture for the group being managed. Effectively the group assimilates the manager’s attitude and the organization benefits through an overall performance empowerment. As noted in Figure 4 of the appendix, there are numerous positive outcomes of effective EI, these include: Employee Retention; Higher Productivity; Physical Health & Well-Being; Improved Teamwork; a Learning Culture; Engaged employees; and greater customer loyalty.

Greater detail and comparative resolution is found as we begin to look at the sub-scale descriptors that make up each of the Composite sections. The following sections will provide this finer analysis, and each Composite includes a brief definition of the supporting sub-scale items that make up the Composite baseline.

INTRAPERSONAL - assessment of inner self

- **Emotional Self-Awareness** – *ability to identify one’s own feelings and their causes.* Helps with knowing yourself; trusting intuition; making good decisions; understanding others. Lack of ESA undermines other emotional competencies, contributes to bad choices and impulsive behavior.
- **Assertiveness** - *ability to express feelings, beliefs, thoughts, and defend one’s boundaries/rights in a non-destructive manner.* Helps with sharing ideas, telling others where you stand, getting your needs met. Lack of this leads to avoiding others or making requests; not sharing ideas or initiate; doesn’t take risks; can be seen as a non-contributing team member.
- **Self-Regard** - *ability to respect and accept oneself, feel confident and secure.* Likely to have positive work attitude and confidence, be self motivated; is related to achievement. Those with lack of SR can be tentative, *wishy washy*, need a lot of encouragement and reinforcement.
- **Self Actualization** - *ability to realize one’s potential, is constantly striving to develop oneself, “grow”* . Is related to strong motivation, initiative and drive; often encourage others to reach potential too. Those without SA lack of direction, purpose; can result in failure to reach potential; may blame others
- **Independence** - *ability to be self directed and free of dependence from others.* Independent people think and act for themselves, while others need a lot of approval, permission from others. Too high independence can interfere with teamwork, collaboration.

Raw scores for the Intrapersonal subscale parameters are show below.

| Intrapersonal | 9/06 EQi | 1/07 EQi | Change |
|------------------|----------|----------|--------|
| Self Regard | 91 | 85 | -6 |
| Emot. Self Aware | 97 | 96 | -1 |
| Assertive | 110 | 123 | 13 |
| Independence | 115 | 118 | 3 |
| Self-Actualized | 82 | 79 | -3 |
| Averages > | 99.00 | 100.20 | 1.20 |

This area remained relatively unchanged from an overall perspective. The scores here are mostly in conflict and may be perceived to contradict further analysis in areas to follow. However, I believe there are some key findings as I review my static state of mind when the Post EQi testing was completed. I was struggling with my decision to move away from a position and group that I had worked with for almost 13 years. I was an empowered leader; motivational and dynamic. I knew my role explicitly, and was considered an expert. The emotional conflicts existed as I gained self-confidence and knowledge from my MBA experiences, yet was still fighting with the overwhelming decision process around moving on or not. This also included having feelings of inadequacy or doubt about my ability to make such a move – hence the low self regard, Emotional self-awareness, and Self Actualized scores. In direct

conflict is the high increase in assertive scores. I was very involved in visualizing and vocalizing my career goals, and was (while deep in doubt) still very steadfastly determined that a change was not only warranted, but a promotion had been earned as well. These scores correlate well with my characteristics in the Myers-Briggs type of ENTP.

At the time of this report I have made the move to a new role, received the expected promotion, and would imagine if I was to take the EQi test today, these scores might actually be even lower. I have a new role, am unsure of myself, no longer the expert, and I have much to learn. Conversely I am feeling somewhat liberated at the same time. Perhaps the honeymoon period of conflicting emotions is upon me.

INTERPERSONAL – capacity for relationships

- **Empathy** - *ability to be aware of and appreciate others’ feelings, see things from others’ frame of reference.* Helps with anticipating and understanding the perspectives of customers, team members and key stakeholders. Those without Empathy can alienate others; low empathy is related to low emotional self awareness. Too much empathy can interfere with meeting one’s own needs.
- **Interpersonal Relationships** - *ability to establish and maintain mutually satisfactory relationships.* Contributes to strong communication and teamwork. Lack of IR can contribute to team problems and can negatively impact productivity and ability to influence
- **Social Responsibility** - *ability to be a cooperative, contributing member of a group or society in general.* Have consideration for the greater good, look for win/win solutions, likely to volunteer for additional assignments. Those without SR may take advantage of others, not show caring for others, create legal exposure

Raw scores for the Interpersonal subscale parameters are show below.

| Interpersonal | 9/06 EQi | 1/07 EQi | Change |
|------------------|---------------|---------------|--------------|
| Empathy | 98 | 116 | 18 |
| Social Resp. | 104 | 116 | 12 |
| Interp Relations | 100 | 106 | 6 |
| | <i>100.67</i> | <i>112.67</i> | <i>12.00</i> |

Wow, talk about being a change agent 007. This area resulted in the highest level of difference from the Pre test to Post test scores. The strange aspect of this was that my scores in this area were not really all that low before, and have shot up significantly. It is also interesting that low Empathy scores are related to low Self-Awareness. One would naturally assume that these two would have changed the same relative to one another, however my emotional SA actually dropped by 1 point, while Empathy went up 18!

From a professional perspective I can clearly see the Empathy factor going up. Over the past 3 years I have made a concerted effort to better align my group with others in the company. I have been striving to be less adversarial, and when negotiating inter-company pricing for our products – looking at the big picture and going for the win-win result. I have repeatedly noted to my subordinates that we may lose the battle in order to win the war.

Social Responsibility has always been a big part of my personality toolbox. I always try to look for the greater good, and the 12 point score improvement is reflective of this. The increase of the later testing is the result of greater involvement. I have been volunteering for more “extra-curricular” activities such

as our Local Diversity Council; leading the 6Sigma program reviews for the whole business; helping out with the Humane Society; Big Brothers; Junior Achievement etc....so an increase in this area is not a surprise to me.

The cause for an increased Interpersonal Relations scoring is unknown to me. Perhaps this is simply a testing anomaly that would vary for me on each testing occurrence. I have tried to better understand how the score would change and cannot remember any personal or professional scenarios that would drive a change. Perhaps the change actually resides with the original testing date. I may have been in a much different frame of mind back then and the result was lower and my current score is closer to a normal rating for me.

STRESS MANAGEMENT – coping / resiliency

- **Stress Tolerance** - ability to withstand adverse events and stressful situations without “falling apart”. Can cope with stress, manage deadlines, handle workloads, be resilient. Those with low ST exhibit anxiety and poor coping interfere with individual and team performance, health, relationships
- **Impulse Control** - Ability to resist temptation or delay gratification. Can maintain composure, plan ahead, wait; is important to trusting relationships, negotiating. Without IC you look “out of control”, unpredictable; may attack others and do things later regret

Raw scores for the Stress Management subscale parameters are show below.

| Stress Management | 9/06 EQi | 1/07 EQi | Change |
|-------------------|----------|----------|--------|
| Stress Tolerance | 93 | 101 | 8 |
| Impulse Control | 87 | 91 | 4 |
| | 90.00 | 96.00 | 6.00 |

The changes in this area are both improvements, but are still somewhat of a disappointment given my personal changes over the past 18 months. I believe that my ability to handle stress is much greater now than ever before, and the Impulse control results are no longer in my bottom three numerically. Given the input from my wife and colleagues, I was expecting a much larger increase in these areas as I have been much more “stable” as my wife puts it. Part of the leveling is that I know how to handle the demands of the MBA program, my family, and my job all at the same time. Back in 2005, at the start of the program, I was rightfully stressed with all the personal issues, and most likely with the prospect of going back to school after 24 years in the workplace. I remember being in somewhat of a panic mode thinking that at my age I would be unable to keep up with the other members of my cohort. I put quite a bit of pressure on myself and much of the stress was probably self-induced. Given that I am a High “A” personality, it may have been something more closely related to that of a motivating factor versus a direct stress issue. I also did not have a very positive experience during my undergrad courses and fully expected the MBA program to continue on that same path.

ADAPTABILITY - ability to go with the flow

- **Reality Testing** - ability to accurately assess the correspondence between what is experienced and what objectively exists. Helps in being realistic, setting achievable goals, keeping things in perspective. Lack of RT can lead to catastrophizing, being too grandiose.
- **Problem Solving** - ability to identify and define problems as well as generate solutions. Use rational, logical approaches; may undervalue intuition. Low PS skills tend not to analyze issues methodically, be too impulsive
- **Flexibility** - ability to adjust thoughts, feelings, and actions. Can respond quickly to changing circumstances, admit mistakes and move on. Without Flexibility you can be rigid, arbitrary, can derail teams and limit career opportunities. If too high may be seen as weak.

Raw scores for the Adaptability subscale parameters are show below.

| Adaptability | 9/06 EQi | 1/07 EQi | Change |
|-----------------|----------|----------|--------|
| Reality Testing | 83 | 85 | 2 |
| Flexibility | 90 | 110 | 20 |
| Problem Solving | 97 | 96 | -1 |
| | 90.00 | 97.00 | 7.00 |

With the exception of the Flexibility score, this area was also relatively unchanged. I don't believe that I will ever stop being a daydreamer and that my Reality Testing numbers will reflect that. I constantly am measuring out multiple scenarios – good, bad, and ugly. I am constantly over-challenging myself and have been very competitive my whole life. It simply is a part of me that I am either unwilling to change or incapable of changing. Perhaps this is not a low score / bad result problem, but more of a result or litmus or status test....this is where you are – learn to deal with this aspect of your emotional intelligence.

Problem solving has always been one of my strongest personal attributes. It's what I do best at work or home and I believe that this is a positive for me even without a significantly high score or change between tests. The consistency of the scoring reflects a reference point that appears to be stable and acceptable. I can see however that having a high Impulse score could indicate a tendency to jump to conclusions or solutions without proper analysis or thought. I believe that part of my PS issues result not from reaching a solution too quickly, but more in the speed of implementation. Once a decision has been reached I tend to want closure quickly, make it happen, and then move on to the next concern. This corresponds with the PI dimension where I have a low "C" (reference Fig 6) which correlates to prioritizing on the go, and my High "A" > "B" which indicates more focus on Things vs People, along with an aptitude for Problem Solving. Much like my extroverted process of thinking out loud can tend to alienate others (introverts) who prefer to think before speaking perhaps my approach to closure is just as disruptive to others. This may be a learning / connection to think about and consider for improvement.

The increase of 20 points for Flexibility is not an anomaly or fluke. Much like the problem solving area, I believe this is another area of expertise and a positive for me. I have always prided myself on the ability to simply move on with whatever I was doing or going through. This is connected to seeing the big picture reference made in the section on Empathy. It may very well have been a low period during the original testing sessions, and considering all the stresses noted above, this too could have contributed to lowering the test scores during the first semester of the MBA program.

GENERAL MOOD - overall satisfaction with life

- **Happiness** - ability to be satisfied with one's life, to enjoy oneself and others, to have fun. Feels good about life and work, can experience joy and satisfaction. Lack of H interferes with being productive at work or in team work.
- **Optimism** - ability to look at the brighter side of life, to maintain a positive attitude in spite of adversity. Is hopeful, sees the glass as half full, is associated with good health, successful relationships, and persisting to achieve goals. Lack of O results in pessimism, which can impact problem solving, decision making and team cohesion

Raw scores for the General Mood subscale parameters are show below.

| General Mood | 9/06 EQi | 1/07 EQi | Change |
|--------------|----------|----------|--------|
| Optimism | 96 | 106 | 10 |
| Happiness | 103 | 103 | 0 |
| | 99.50 | 104.50 | 5.00 |

No much to complain about here ☺. I am usually easy going and use my sense of humor to glide through any rough spots along the way. I see the EQi scores as validating my outlook on life and to comment further would require too many run-on sentences.

LOOKING FORWARD:

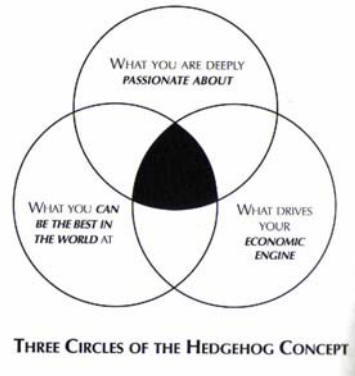
I have found the various personality and emotional intelligence assessments much more useful towards the end of the MBA program than at the beginning – probably a character flaw in there somewhere. I seem to have a much better grasp on the message that the analysis is showing me, and in some cases have even been surprised upon reviewing the criteria at how accurate the assessments have been.

For example, upon reviewing the *StrengthsFinder* analysis, the following statement is critical to my perspective of the future and is exactly in line with the First Break All the Rules concept of working on optimizing on your strengths.

In the early 1950s, Donald O. Clifton, who would go on to be named the "Father of Strengths Psychology," noticed a major problem: The field of psychology was based almost entirely on the study of *what is wrong* with people. He wondered if it would be more important to study *what is right* with people.

I truly believe that we can achieve our best performance by improving our awareness of all our EI/MBTI/PI scalars, but we cannot drop our strengths to spend a lifetime focusing on the apparent weaknesses these tests may indicate. We need to consider Clifton's perspective that *“.our talents do more than make us unique individuals. When we follow our talents – the ways in which we naturally think, feel, and behave - they also serve as our best opportunities for true excellence.”* The StrengthsFinder analysis pointed out my 5 key strengths, which I found (in retrospect) to be absolutely dead-on to my own internal view or my self image. These were 1) ideation; 2) Command; 3) Communication; 4) Strategic; and 5) Relator. These are fully defined in the appendix as Table #2. While this paper focuses on the EQi comparative analysis, I found the StrengthsFinder's prose to be much more to the point and I understood it with much greater clarity.

So how does this impact my future plans? My next steps? I would like to take a modified approach to Jim Collins Hedgehog Concept shown graphically below. I want to work through a personal success mapping approach to his perspective on Good-To-Great companies. Collins notes that **“A hedgehog concept is not a goal to be the best, a strategy to be the best, an intention to be the best, a plan to be the best. It is an understanding of what you can be the best at. The distinction is absolutely critical”**



Good to Great, by Jim Collins... see Chapter 5; pages 90-91

I want to focus on further developing my inherent strengths, and still understand and be aware of my other PI/EQ_i attributes. This requires me to identify: 1) what can I be the best in the world at? 2) What drives my economic engine? And 3) what am I deeply Passionate about?

- 1. What you can be the best in the world at** (and, equally important, what you *cannot* be the best in the world at). This discerning standard goes far beyond core competence. Just because you possess a core competence doesn't necessarily mean you can be the best in the world at it. Conversely, what you can be the best at might not even be something in which you are currently engaged.
- 2. What drives your economic engine.** All the good-to-great companies attained piercing insight into how to most effectively generate sustained and robust cash flow and profitability. In particular, they discovered the single denominator—profit per *x*—that had the greatest impact on their economics. (It would be cash flow per *x* in the social sector.)
- 3. What you are deeply passionate about.** The good-to-great companies focused on those activities that ignited their passion. The idea here is not to stimulate passion but to discover what makes you passionate.

I don't actually have all these answers – yet. But using the EQ_i, MBTI, PI, and the StrengthsFinder analysis, I will be undertaking the steps required to properly map and answer those 3 critical questions. Then I will be spending time optimizing and leveraging those drivers to envision and achieve my own personal and professional success.