



# ELICITING EXCELLENCE

Helping Successor Succeed  
and Owners Get Paid™

Michael Beck International, Inc.  
Portland, OR USA

## MBI Successor Assessment



Our 360° Successor Assessment examines the 35 traits, competencies, and behaviors that are essential for a successor's success. These 35 competencies fall into four areas: **Character Traits**, **Interpersonal Skills**, **Business Competence**, and **Execution & Productivity**.

### *The Essential Leadership Competencies:*

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#### » Character Traits

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- Integrity
- Empathy
- Attitude
- Emotional Control
- Flexibility
- Self-Confidence
- Service Motivation
- Appreciative
- Receptive
- Humility

#### » Interpersonal Skills

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- Open Communication
- Effective Communication
- Teamwork and Collaboration
- Conflict Resolution
- Autonomy
- Delegation
- Coaching and Mentoring
- Professional Growth

#### » Business Competence

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- Influence
- Business Savvy
- Strategic Thinking
- Presentation Skills
- External Awareness
- Decision Making
- Problem Identification
- Judgement

#### » Execution & Productivity

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- Time Management
- Business Savvy
- Big Picture Thinking
- Risk and Reward
- Perspective
- Foresight
- Mistakes



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## MBI Successor Assessment (continued)



### ***Benefits of Our Assessment***

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- **Efficient and Confidential** – The assessment is conducted online and is completely confidential.
- **High Rate of Response** – To ensure compliance from raters, the assessment can be completed in less than 10 minutes. Spending more time writing comments is optional.
- **No redundant questions** – The questions are clear and concise. This eliminates the need to ask the same questions multiple ways.
- **Comprehensive** – The 360 feedback report includes all essential competencies and skills for effective leadership, and can include feedback from up to 25 raters.



### ***The Assessment Process***

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1. **Set-up:** We set up the assessment and then enter the list of raters.
2. **Feedback:** The system sends out reminder emails to ensure a high response rate.
3. **Report:** Once we have sufficient feedback (usually within about two weeks), we generate a comprehensive report showing a successor's strengths and weaknesses, along with written comments from raters.
4. **Review:** We meet with the stakeholders to review the assessment results, offer perspective and insights, and suggest a plan of development.



### ***Assessment Pricing***

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The fee for our Successor Assessment Program includes all set up and administration, feedback on a successor from up to 25 raters, a detailed assessment report covering the 35 competencies, and an in-depth debrief to help extract insights.