

Bates ExPI™

Executive Presence Index

The Bates ExPI™ is the first and only research-based, scientifically validated assessment to measure executive presence and influence.

About the Bates ExPI™ Assessment

The Bates ExPI™ multi-rater assessment provides executives and high-potential leaders with an in-depth analysis of their ability to influence business outcomes. The assessment is a powerful foundational tool for coaching and development plans. Bates ExPI™ feedback helps leaders build the presence and influence necessary for mobilizing teams, driving strategy, and making an impact. Organizations use the tool to develop current and future leaders and guide strong succession plans.

The Bates ExPI™ focuses on the three dimensions of executive presence outlined by the Bates model - Character, Substance, and Style. Individual rating scales measure 15 distinct facets proven by our research to be directly related to a leader's ability to influence. Perceptions of important stakeholders - peers, direct reports, and managers - are compared with the leader's self-perceptions in order to identify strengths, needs, and gaps.

Once the results are tabulated, the leader receives an in-depth ExPI™ Feedback Report and User Guide. A Bates-certified coach provides individualized orientation and feedback sessions to discuss and interpret themes. Through this process, the leader develops a strong conceptual understanding of what Executive Presence is, learns how to leverage his or her individual strengths, and gains insight into how to improve in critical areas that will drive his or her success.

The Three Dimensions of Executive Presence



"I've never seen an assessment that defines executive presence with such depth and precision. It's opened my eyes to how a high potential can be developed into an influential leader. I can also see how it actually complements other leadership assessments." - SVP of Executive Development, Fortune 500 Global Technology Company

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Model of Executive Presence

Character - qualities that are fundamental to the leader as a person, to his/her identity, and give us reason to trust him/her.	Substance - cultivated qualities of leadership that inspire commitment, inform action, and lead to above-and-beyond effort.	Style - overt, skill-based patterns of communicative leadership that build motivation and that shape and sustain performance.
Authenticity – being real, genuine, transparent, and sincere in one’s relations and interactions with others.	Practical Wisdom – displaying highly honed qualities of insight and judgment that get to the heart of issues and produce prudent decision.	Appearance – looking and acting like an able executive, adapting dress and demeanor to the situation, and handling social situations with tact.
Integrity – acting with fidelity to one’s values and beliefs, living up to high standards of morality, veracity, and promise keeping.	Confidence – being self-assured in decision-making and action; ready to accept the risk and responsibility for taking timely action.	Intentionality – clarifying direction and keeping actions aligned and on track, all without stifling dissent or neglecting needs to adjust course.
Concern – demonstrating interest in others, encouraging adaptive development, and promoting a healthy sustainable culture.	Composure – proving to be steady in a crisis, able to calm and focus others, and to bring objectivity and perspective to critical decisions.	Inclusiveness – actively involving others, welcoming diverse points of view, encouraging ownership in mission, and empowering initiative.
Restraint – displaying a calm disposition, characterized by reasonableness and by avoidance of emotional extremes or impulsiveness.	Resonance – connecting with others; attentive, attuned, and responsive to feelings, motivations, and thoughts; deepening alignment.	Interactivity – promoting an interpersonal style of dialog and timely exchange of information and questions to coordinate action.
Humility – showing awareness of one’s strengths and weaknesses, an openness to others, and a belief that all persons have worth.	Vision – generating an inspiring, enterprise-wide picture of what could be; recognizing emerging trends, and engaging all in strategy.	Assertiveness – speaking up, valuing constructive conflict, and raising issues directly without shutting others down.

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Assessment Process

Bates ExPI Process Step	Description
Select your ExPI raters	<ul style="list-style-type: none"> • Receive a welcome letter via email • Choose your raters, typically including your supervisor, direct reports, and selected peers • Typically 10-14 raters total
Complete self-assessment	<ul style="list-style-type: none"> • Receive email link to online ExPI assessment • Includes 90 items and three open-ended questions • Anticipate 15-20 minutes to complete ExPI
Receive orientation call	<ul style="list-style-type: none"> • Schedule a 30-minute call • Answer questions about your business challenges to ensure that feedback is specific and relevant • Learn how to interpret your ExPI report and how to prepare for your feedback session
Prepare for feedback call	<ul style="list-style-type: none"> • Analyze ExPI report, following process in User Guide • Complete one-page Development Summary Worksheet and email to Bates prior to feedback call • Plan on taking 1 1/2 - 2 hours for this “homework”
Complete feedback call	<ul style="list-style-type: none"> • Bates coach will conduct one-hour feedback call • Develop clarity about your key strengths and developmental themes related to executive presence • Determine first steps to make feedback actionable

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