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Transforming your business
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Re: Culture and Management Report

To Owners

XYZ Advertising

The next section describes your culture—and graphics at the end show your Leadership team which represents your culture, followed by your Management team and High-potentials (10) who represent your future. The graphics may help you “see” what the following text is explaining. Note that the graphics are presented in this order:

- *Motivators (your collective values or culture),*
- *Behavior Natural Style (how you come across to others),*
- *Behavior Work Style (your adaptation to work),*
- *Leadership Competencies.*

I modified your personal write ups with specific recommendations. The other individual write ups are not changed substantially.

CULTURE AND MANAGEMENT SUMMARY:

The first graphics are of the Leadership Team and defines your culture:

- All business—Learn, Earn and Lead Others
- Task oriented—make things happen, get results
- Lead with a focus on Efficiency & Delegation

Your culture is bottom line focused, practical, and appreciates a strong “back-bone”. You are friendly and engaging—but you are in business to do good work, keep everyone working smoothly and efficiently, and make money. Relationship building and pleasing people is a by-product of the above factors, not the focus of the business.

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This is a perfectly healthy profile for a profit-making organization. The final four graphics represent the future of your company—your managers and “high potentials”. Compare the two “Motivators” charts (1st chart and 5th chart—the charts are numbered at lower right). **The leadership team is: ALL business, highly values both learning and ROI, and is somewhat less interested in leadership (control, politics).** **The management team is more intensely learning focused than you, less intensely ROI focused, and care even less about leadership.** Their second strongest motivator tends to be Peace & Harmony, which translates into “conflict avoidance” or what you might call, lack of “toughness”. They believe in Helping Others, which is admirable, but as a whole they are not as business oriented as current leadership.

Behaviorally, the leadership team is ½ results and bottom line focused and ½ quality and team focused (graph 2)—and you adapt to a work style that tends to be all results focused (graph 3). **The management team (graph 6) tends to be extroverted, results and people oriented—but graph 7 shows an interesting flip-flop. Nearly the entire team moves 180° opposite their natural profile. They go from extrovert to introvert.** This is a response to day-to-day management behavior that generates high stress in this group of managers and high potentials. The stress is a direct result of not fitting in with the expectations of your strong business culture, and/or a factor of poor management practices.

The last charts (4 & 8) look at the **leadership styles of the two teams.** Both teams tend to favor a leadership style based on efficiency, planning and delegation. Three issues:

- ALL the leaders tend to be pessimistic or concerned about the future.
- Half of the managers are pessimistic about the future.
- 6 of the 10 managers and 2 of the 6 leaders are disengaged from their leadership roles.

CAUSES AND SOLUTIONS

- The pessimism starts with the two of you. This is not to say you are negative or running around claiming the sky is falling—but you are concerned or unclear about the future, due to your focus on succession and exiting the business. This concern causes you to speak about the future less clearly or less specifically—which tends to cause uncertainty and pessimism throughout the organization.
 - Solution: Complete or re-visit your plans and fine-tune your internal messaging. While it is OK to not have “all the answers”, it is important to present clear plans and direction. *Communication completes the plan.*
- Many of the managers / high-potentials do not fit your culture. This may be the core reason your business has plateaued over the past 3 years. You cannot move to the next level with key people moving in different directions. This is true with Ben and Janet on the leadership team and true with a number of your managers / high-potentials.
 - Solution: Revise hiring procedures to assure that future hires fit the culture and are strong candidates for management and leadership.
- About half of the people surveyed are disengaged from their leadership position. In the individual reviews I highlight a general approach to coaching, development or training to move people to a more effective leadership style. *In many cases, you need to determine if it is productive to prepare someone for a leadership role for which they may not be suited.*
 - Solutions:
 - Launch a series of one-on-one discussions with each team member to find out what they really want

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and what they are willing to do to achieve their goals.

- Let them know your expectations and come to a common path forward.
- Come up with a performance management plan to get them there—and keep the discussions going.
- Track progress, and plan assignments that complement their efforts and provide growth—whether or not that leads to a leadership position.
- Be prepared to make tough decisions to assure people are performing to full potential and delivering what you require.

Strategic Talent Management is ready to work with you on these initiatives and others that may arise. This report is not meant to provide every answer, but to be a down payment on identifying “soft” skill gaps that are preventing growth, people-management systems needing improvement, and “hard” skills that need attention.

INDIVIDUAL ASSESSMENTS:

Individual assessments are 75 to 120 pages—I plan to forward each person their own assessment along with a piece on how to read their assessments just before we meet with each subgroup. I have attached that information to this email, so you will see what the others see. It may be easier to send the balance of 14 assessments to the cloud for your personal review, rather than copy you on the next 14 emails! I will set that up and discuss the particulars Monday.

Everyone assessed for LEADERSHIP—a select group was also assessed for their PROFESSIONAL / TECHNICAL ROLE (“Work Life”,

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more focused on project management). Where someone was assessed with both reports, there is a mention of which role they seem to prefer and how that might impact their performance. In nearly every case, people identify more strongly with Leadership than Project Management or “doer”.

OWNERS:

Bob—As mentioned the other day, your style is a “visionary” profile; your behavior style tends to be highly extroverted, approachable and results oriented. You are business motivated, with a particularly strong ROI.

Your Leadership Style is that of a “Delegator”: you are good at assigning responsibility and following up to assure they complete their duties. Your Talent is particularly strong—in terms of relation building and communicating expectations to others. Your Energy & Drive is very strong—you embrace your role as “leader”, and are clear about the future though you are pessimistic about achieving that future—not unusual for someone contemplating retirement. While you are a strong communicator, the last point can impact the clarity of your communication to others.

Bill—As also mentioned the other day, your style is an “integrator” profile; you tend to be very flexible in your behavior style, and adapt to a style that is at once approachable, friendly and big picture—but also analytical, serious and zeroed in on the details. You are business motivated, with a particularly strong focus on KNOWLEDGE & DISCOVERY (learning) and a strong focus on ROI. This is the key to understanding the integrator role—you are knowledgeable, take a bit more time to study things, and end up making good practical decisions—where the visionaries tend to

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come up with an idea and implement without the same level of analysis or study. The integrator / visionary combination on the ownership team is powerfully effective.

You completed both the Leadership and Work Life profile—while you identify with both roles, you see yourself as a leader and embrace that role powerfully. Your Leadership Style is “Efficiency”: you are effective keeping a team focused on its job. You have a strategic mind and are good at communicating your expectations to others—efficiency and results takes priority over maintaining relationships. Your Energy & Drive for leadership is superlative—it is fair to say you *love* your work, fully embrace it and are very clear about the future. Like Bob, you may be slightly pessimistic about that future.

Your Work Life profile is strong—suggesting you love doing the work and are a creative problem solver. In that “doer” role you may be less effective communicating expectations (because you are too busy “doing”). While your Energy & Drive is good in this role, it is not as strong as in your leadership role—but a hint of pessimism about the future persists.

CONCLUSION / NEXT STEPS FOR THE TWO OF YOU:

You have effective and complementary leadership styles—I believe you need to foster improved communications, and build / model / drive new people management systems to keep everyone aligned to your culture, business plans, communication and management styles:

PLANNING: I expect you have plans in place—but they may be focused on the business, sales, financial management, technology, physical plant and other “hard” factors. Your plans may not reflect requirements in the “soft” areas of recruitment, day-to-day management, performance management, coaching, communication or succession. *Plans for the*

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“soft” side of the business do the same for you as plans for the “hard” side of the business—they provide a benchmark to communicate, measure and track. The more people are involved, the more likely the plan is achieved.

RECRUITING / HIRING: This may be the easiest fix—now that we have established the baseline culture, and individual management and communication styles—it is a matter of sourcing and hiring candidates who “fit” your culture in addition to having the technical skills and experience you need. This information can be used to do everything from writing behavioral advertisement copy, to developing probing interview questions, and seeding a new employee’s performance management program.

LEADERSHIP: Management systems need to be addressed to make sure they are delivering what you need. I would include, but not limit you to, New Employee Orientation, Performance Management to modify behavior, Regular Management / Employee meetings to facilitate communications, plus Coaching, Training and Development for all leaders, managers and high-potentials.

In many of the individual write ups I suggest you start by talking to each person about their goals. You likely already have regular employee communications in place, but are you communicating about direction, goals, communication (and other soft skills) or primarily talking about schedules, projects and other “hard” topics? In many cases you must do the communication as the person’s immediate manager may be part of the problem! In any case, effective communication needs to be modeled top-down. Have people talk about their plans, talk to them about your plans, be explicit about how they fit (or not) and document these discussions into a performance management system built on regular on-going communication.

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SUCCESSION: Everything we are talking about is in support of this critical function. Right now you have a team of 16 misaligned people hobbled by drains on their natural levels of Energy & Drive. Whether you sell the company to a 3rd party, or to a current employee(s)—you will maximize value and future success of the business by investing in the management team today. *Investors pay for talent, energy and drive, not bricks, mortar and customer lists.* If you improve the talent pool in terms of the soft skills we are discussing, you will have a strong integrated company that is able to grow to its full potential.

Ben—Ben does not see himself as a leader as much as a “doer” or project type manager. This is consistent from the beginning: His behavior style is fully task focused. He has the ability to focus on the big picture and the fine detail equally well, but may come across to others as aloof or overly demanding. Notably, this is quite different from the two of you; you both have a friendly approachable side. Ben is strongly business focused, particularly by ROI and KNOWLEDGE & DISCOVERY (learning); notably, he is *modestly* motivated to be a LEADER.

Ben completed both the Leadership and Work Life profile—he tends to see himself as a worker, doer or project manager as opposed to a leader. He tends to be relationship focused, which may not be evident in people’s day-to-day interactions with him due to his “*hard shell of a task oriented behavior style*”. He tends to be strategic in his approach, in that he enjoys doing good work well and tends to be a creative problem solver—but this all takes a back seat to maintaining relationships. His Energy & Drive comes exclusively from his strong self-esteem and his love of the work—he is so focused on the day-to-day work, that he does not “lift his head up” to take stock of the future. Consequently, the future is unclear and perhaps a bit scary; this may be explained by his ownership situation.

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The only difference in his Leadership profile is that he is fully disconnected from his role of leader; he seriously dislikes it and sees large and insurmountable problems around this role. He does not see his future clearly, as a leader. *He is like a hiker who does not see his destination or the trail ahead very clearly. He has no idea which turns he should make along that trail, or if it is even the correct trail.*

CONCLUSION / DEVELOPMENT: His negativity or pessimism may be connected to his inability to see a path to leadership; it also may be driven by his greatly valuing relationships and feeling his relationships with the two of you somehow diminished. In any case, the question becomes, can Ben move into a productive and positive leadership orientation? *His key to success is planning his own future and becoming clear about his own destination and the trail ahead—what is his personal brand and what does he want to do with it.* Only he can answer this question, and he must do it or risk a downward spiral of blaming others and negativity. If the three of you feel he is salvageable—he requires personal coaching around planning.

LEADERSHIP TEAM:

Jane—Her Leadership Style is “Efficiency”: she is effective keeping a team focused on its job. She has a strategic mind and is good at communicating her expectations of others, but efficiency and results takes priority over maintaining relationships. *Her Energy & Drive for leadership is very low—her discontentment may be driven from short-term or temporary personal setbacks. Jane is much harder on herself than others, and she is completely disconnected from her role as leader and sees many problems around her. She does not have a clear vision of her future direction and is highly pessimistic about the future.*

Her behavior style is highly extroverted, approachable and results oriented. This is a good style for most business positions. Her top three motivators are equally strong: KNOWLEDGE & DISCOVERY (learning), PEACE & HARMONY (avoiding conflict) and GUIDING PRINCIPLES (doing things the *right* way). Translation: she can be rigid about her belief that there is always more to learn about a subject or project, and while she does not love conflict—people around her will not notice!

CONCLUSION / DEVELOPMENT: The first step is to sit down with her, if you have not already, to uncover the source of her disengagement and pessimism. Given her strong Talent, her love of learning, and her ability to communicate expectations—she has the Talent to be an Integrator type leader. Clearly, today there is something missing. Her inability to read people well or communicate well may be the source of her frustration. This can be coached, but if she cannot identify the issue and turn things around, you will lose her.

Janet—Her behavior style is highly extroverted, approachable and results oriented. This is a good style for most business positions; but, she adapts

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to a much more reserved and quality focused style in her work. It may be that her role as finance manager drives this, but it may also come from her underlying Attitude that places relationships always in the prime position above numbers and practical outcomes. She is strongly motivated by ROI and all the business factors. Indeed, to this point, *without the third assessment*, I would have wrongly predicted that she is a strong financial manager but not as strong on the relationship side of HR work. It turns out this is just backward.

Janet's Leadership Style is "Communicator": She will check for understanding through regular meetings with others. While she can think strategically and values both rules and efficient outcomes, *she always puts relationships in the prime position over everything else*. The corrected prediction is that she is a strong HR person who appreciates the need for profitability and bottom-line results. As a financial manager she may lack the "back-bone" to put numbers and facts ahead of people and their feelings. Notably her Energy & Drive is modest. She is modestly engaged with her work as a leader and reasonably clear about her personal direction, she is pessimistic about achieving her future.

CONCLUSION / DEVELOPMENT: You commented that Janet lacks confidence in leadership meetings and is afraid to speak at company meetings—and is not getting work done. I am assuming these comments are largely around her finance management duties. In any case, this is not likely the right position for her, but of course a 44 person company cannot support a full time finance person *and* a full time HR person. She may be more effective in an AE/HR role where she is supporting clients both internal and external.

Jenny—She tends to be strategic in her thinking and reasonably good at communicating expectations of others. She is not as good with details

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and is happy to delegate those to others. *She does not read people well, and will sometimes make errors of social interaction and not realize it. This is something she can turn around, but it will take focused coaching.* Her Leadership Style is “Planner”: Here is my plan, these are your assignments. She may not follow up or track the details of those assignments. Her Energy & Drive for leadership is quite strong—she embraces the role, has a clear picture of the future and is optimistic about it. We also assessed her with the Work Life profile: As a “doer” she is more focused on doing a good job and is a creative problem solver. She is also more relationship focused than as a leader. Her Energy & Drive is lower for as a “doer”, suggesting that she does not identify with this role as strongly as she does leadership.

Her behavior style is naturally stressed with “one foot on the gas and one foot on the brake”, but she adapts to a business orientation which is highly extroverted, approachable and results oriented. This adaptation is stressful, and under high stress she will tend to revert to her natural more moody style—which may add to her difficulties relating to others. She is powerfully motivated by KNOWLEDGE & DISCOVERY (learning) and more modestly motivated by ROI. She appreciates learning and always sees reasons to learn more or study something longer; she has a bit of a “governor” on this in that she is aware of the bottom line and the value of time.

CONCLUSION / DEVELOPMENT: Given her strong Energy & Drive, I would recommend coaching on the topics of empathy, listening and developing greater awareness of others as a leader. She has the capability, but has *learned* to forget this as a leader—she must re-learn that communication and relationship capabilities are critical for effective leadership.

MID-LEVEL MANAGERS / HIGH POTENTIALS:

Kathy—Her behavior style is all people oriented—everyone likes her and vice versa. This is reinforced by her top two motivators: HELPING OTHERS and PEACE & HARMONY. She is team oriented and will go to great lengths to avoid conflict. She is moderately motivated by AESTHETICS and ROI—which is a great combination for creative roles because she appreciates both creativity and to a moderate extent the need for profits. To the extent that the Digital Producers team is a creative team, Kathy may be uniquely qualified to lead them.

Her leadership style is “Planner”: She is effective at planning, defining and communicating a mission and her expectations, and also good at aligning team talent with the tasks of that mission. Her weakest competency (as a leader) is relationship building, meaning that she may not always listen or “read” people well, again, this is a common problem with those new to management or leadership. Her Energy & Drive for leadership is strong and comes from fully embracing the role, though she is not clear about her leadership goal; her future in leadership is unclear and perhaps scary to her.

CONCLUSION / DEVELOPMENT: Her behaviors and motivators suggest she is prone to pleasing others and not confronting issues; a lack of “back bone.” Her leadership style suggests that she may be aware of and depends on her planning and directing skills to maintain control over a team; Kathy may benefit from coaching and development to improve her listening and relationship building skills while maintaining her interest in “leading from a plan” and not becoming a “people pleaser”.

Arnold—He is a task-master who can see the fine detail and big picture simultaneously. He maintains his task orientation at work, but becomes

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purely focused on results and controlling the outcome—no matter the impact on people. As you might expect with a “great technical mind”, his strongest motivator is learning (KNOWLEDGE & DISCOVERY), and in number two position, ROI. It may surprise you to learn that his next two motivators are tied for third strongest: PEACE & HARMONY and LEADERSHIP. *Arnold is all about control—perhaps he feels he has more control with a unique role in the company unencumbered by managing people.*

To a marginal extent, he sees himself as a Leader more than a doer. He is a “Delegator”, which is a very good leadership style—meaning he is capable of assigning responsibilities based on a plan, and following up. He is a good one-way communicator, but may not always listen well. *While it may not be always obvious with Arnold, he is very aware of relationships and reads people well.* His Energy & Drive for leadership is moderate. He is not engaged with the role, but he is optimistic about achieving his leadership goals even if he is not clear about those goals.

Arnold was also assessed by the Work Life profile. In this assessment his relationships capabilities really shine. He is somewhat more engaged with his role as a “doer” than as a leader—though he seems to identify himself more as leader than doer. He lacks clear goals for the “doer” role and is pessimistic about that future direction as well.

CONCLUSION / DEVELOPMENT: Arnold is well suited to leadership, though his “all task” and highly controlling (perhaps perfectionist) style will intimidate many people and prevent him from listening well. As you noted, he may not want an official leadership role as it is too restrictive—but he clearly embraces a “doer” role. The key way to keep him motivated is to give him authority and control over key projects or situations. He will appreciate public acknowledgement and recognition. He is clearly an

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example of someone who may be valuable to you and happier in a non-management role.

Art—His behavior style is extroverted, somewhat stressful, task and results oriented. He adapts to work by becoming more stressful, cautious and change resistant. His work style is “one foot on the gas and one foot on the brake”. He is strongly motivated by KNOWLEDGE & DISCOVERY (learning), followed by ROI and LEADERSHIP—all “business” motivators.

Art was assessed with both LEADERSHIP and WORK LIFE profiles. By a slim margin, he sees himself more of a Leader than a Doer or Project Manager. His Leadership Style is “Efficiency”: He is effective keeping a team focused on its job. He is good at communicating his expectations of others, is strategic in his thinking, but efficiency and results generally takes priority over relationship building. His Energy & Drive is moderate—he is moderately engaged with his work and sees problems around him, and he is moderately clear about his future destination as a leader and open to whatever happens next.

As a “Doer,” Art loves to do good work well; he is a creative problem solver and is sometimes so focused on the work that he forgets about people around him—an attitude that he has modified in the right direction as a leader. His Energy & Drive comes exclusively from being moderately engaged as a Doer, but he identifies more strongly as a Leader than a Doer.

CONCLUSION / DEVELOPMENT: Art is business motivated, and has some of the capacities for strategic thinking, but he may be overly confident in his Leadership capabilities and therefore complacent about growth and improvement. *The first step is to be sure he wants to invest time and energy into growth and development.* Training and coaching

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around leadership and business factors will be effective in building his skillset and perhaps showing him that he has more to learn (defeat his complacency). Whether or not this improves the profitability of Web Development depends on many other factors, but it will certainly impact his leadership style and potentially his business management decisions.

Alfred—Outside of work, people will describe him as approachable, friendly and outgoing—and also note that he is good at getting things done. At work he drops the “friendly approachable” aspect of his style and becomes a task-master who focuses on getting things done and controlling the outcome. His strongest motivator is learning (KNOWLEDGE & DISCOVERY), and in a close number two position, ROI. He is marginally motivated by HELPING OTHERS and LEADERSHIP. Alfred is strongly driven to be in control.

Alfred was evaluated with both a Leadership and Work Life instrument. By a marginal degree, he sees himself more as a leader. His style is “Efficiency”: He can be effective keeping his team focused on the task at hand; he is a strategic thinker and is reasonably good at communicating his expectations. He enjoys doing good work well, though *he is not effective at reading others and can often make mistakes with relationships and not be aware there is a problem. People may perceive he does not care if there is a problem.* His Energy & Drive for Leadership comes exclusively from being clear about his goals and standards, and being optimistic about his ability to achieve both. He is completely disengaged from his leadership role and is very hard on himself. He tends to be a perfectionist.

In his role as project manager, he is comfortable getting things done through people, and absolutely does not care to be managed or told what to do. He is a creative problem solver. In this role his Energy & Drive is

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extremely low. He has no goals and no engagement with his role as “doer”.

CONCLUSION / DEVELOPMENT: He is clearly disengaged (from all his roles) and it will be valuable to understand why this is the case. Talk to him directly about this. He knows what he wants as a leader; have him tell you. It will be useful to also have him discuss what he most likes and dislikes about his current role. While others likely perceive that he is ego-driven or “not caring”, this is inaccurate. He is extremely hard on himself and others, which comes across as negative and critical. These challenges likely reflect personal dissatisfiers. Coaching may provide some benefits—to at least “round off the sharp edges”—but you may uncover other more intractable reasons for his negativity in an open discussion.

Karen—She has a flexible but stressful style; that is, she can connect with most anyone but she may be trying to please everyone. She adapts by taking a task oriented style to her work, but under high pressure, she will return to her more flexible/stressful style. She is motivated by business factors beginning with KNOWLEDGE & DISCOVERY (learning), ROI and LEADERSHIP—she is also modestly motivated by AESTHETICS (creativity).

The issues you are seeing seem to come from her Leadership Style, which tends to be “Control” oriented. The challenge with this style is the leader is under pressure to “know it all” which is the opposite of developing a team and delegating the work and responsibilities. She does have a solid leadership talent upon which to build—assuming that is what she wants to do. Her Energy & Drive comes entirely from engaging with her work; she is moderately clear about her future but pessimistic about achieving the future she envisions. Her pessimism may involve realities of

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dealing with a growing family, which of course is beyond our ability to impact.

CONCLUSION / DEVELOPMENT: The first step is to talk with her about what she envisions for herself at XYZ Advertising—as a leader or otherwise. She may not be clear about this, and you can approach the question by exploring what she most likes and dislikes about her work and build from there. Her style right now suggests she is trying to do too much, which explains her stressful natural style and possibly her pessimism about the future. She would benefit from coaching and development to “let go” of her desire to control and accept the need to develop others to accept delegation and share in “controlling” or planning the work.

Katherine—There is a strong theme of being a “people pleaser” that runs through all three assessments. 1) She is powerfully motivated to avoid confrontation (PEACE & HARMONY) at any cost. Secondly, she is motivated by KNOWLEDGE & DISCOVERY (learning), and modestly motivated by ROI. 2) Her motivators are reinforced with a behavior style that is best described as “nice”. Everyone likes her and she likes everyone back, because 3) she is a people pleaser—she is a wonderful listener who never confronts or challenges others. She feels if she is nice to the world, the world will be nice back. That can often work, but when she needs to be “tough” to discipline, correct behavior or simply confront bad behavior—this is beyond her.

Her Leadership Style is “Developer.” She is very good at prepping team members for leadership. She gets things done through her highly developed relationship skills and her interest in “doing” great work. She is a creative problem solver who is ambivalent about rules and procedures; meaning *she is not as effective communicating her expectations to*

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others. The major leadership challenge, besides being a people pleaser, is her discomfort with giving direction or clarifying expectations when it is necessary. People will like her, but may complain they are not sure what she expects of them. Her Energy & Drive comes from being clear about her leadership goals and optimistic about getting there; but, she is disengaged with her leadership role and sees many problems around her.

CONCLUSION / DEVELOPMENT: Katherine relies on her exceptional relationship building and maintenance skills to get things done. This often works, as people want to please her in turn, but it is not a fool proof leadership style. Katherine will excel in any position that requires exceptional relationship building and maintenance skills. Most customer contact positions such as AE will suit her, and she can be inspirational leader—but primarily of people who are independent, and do not need to be “managed”. The question may come down to—what is the best application of her talents to XYZ Advertising’s needs.

Kate—I can summarize her behaviors and motivators in one word: Nice. Everyone likes her, she has no enemies, and she likes everyone. Her adaptation to work is to become more reserved, quiet and quality focused (both with projects and people). She becomes more diplomatic and serious. Her two strongest motivators are PEACE & HARMONY and HELPING OTHERS. Her next three motivators are moderate and in a tie for “second place”: KNOWLEDGE & DISCOVERY (learning), GUIDING PRINCIPLES, and AESTHETICS. She clearly is motivated by team work, teaching/sharing what she knows with others, and doing things “right”. This is a good profile for HR work or any customer service position—she is not motivated by ROI or LEADERSHIP.

Her leadership style is “Efficiency”: She can be effective keeping a team focused on the task at hand; she is a strategic thinker and is reasonably

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good at communicating her expectations to others. Consistent with her “nice” behavior style, she reads people quite well—but is no push-over. That is to say, she has the backbone to stay focused on delivering to a plan and delivering good work. She may not say ‘no’ in a loud voice, but efficiency is more important to her than pleasing others. Her Energy & Drive for Leadership is moderate—probably because this is not a role she has thought about or knows much about. Right now it does not engage her though she is open to whatever comes next.

CONCLUSION / DEVELOPMENT: You can prepare her for leadership (assuming this is what she wants) through coaching and development—her number one challenge will be to become more comfortable dealing with confrontation and saying “no”. She will also benefit from studying business—not just people management but also basic business management—as this is foreign to everything that motivates her and is often an obstacle for HR professionals.

Allan—While most of the people I have reviewed at XYZ Advertising are extroverted, Brandon is quiet, reserved and quality oriented. He adapts to work by becoming decidedly more reserved and change averse. He is strongly motivated by KNOWLEDGE & DISCOVERY (learning), by avoiding confrontation at all costs (PEACE & HARMONY), and by HELPING OTHERS. He is modestly motivated by ROI. People who are strongly driven by ROI can sell “anything to anyone”, those with more modest motivation from ROI tend to be able to sell only those things in which they believe or appreciate. Introverts can sell, but do best one-on-one or upselling to people that they know well.

His Leadership Style is “Control”: as in “command and control” focused. That is, I have the plan, and expect you to carry it out. He puts himself under pressure to “know it all” which is the opposite of developing a team

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and delegating the work and responsibilities. As a leader, he is not an effective listener—as he is focused exclusively on planning and regulating. His Energy & Drive is modest. He is reasonably engaged with his work, clear about his future goals as a leader, but pessimistic about achieving those goals.

CONCLUSION / DEVELOPMENT: As always, any development activity needs to begin with a conversation about what Allan wants, what he likes to do, and what he is willing to work on. I can see how he might be a very good accounts person as he is quality and support oriented, smart and likely has good project management or “doer” talent. As a leader, he is trying to do too much, which explains his stressful natural style and pessimism about the future. It is possible coaching will help improve his leadership skills, if he wants that and if it makes sense to move a successful accounts person into a role where they may be less successful.

John—Consistent with his role, his primary behavior style is “compliance”. He tends to be serious, quality oriented, with a stressful orientation that also values people and relationships. He adapts to a work style that is less stressful, more introverted, and squarely focused on quality relationships and processes. Also consistent with his role, his prime motivator is KNOWLEDGE & DISCOVERY (learning), reinforced with a strong motivator to do things “right” (GUIDING PRINCIPLES) while maintaining PEACE & HARMONY to the extent possible.

He clearly sees himself as a Leader more than a “doer”. His leadership style is “command and control”: He communicates his plan and his expectations, and expects everyone to deliver. This may be necessary to some extent given his role, but he is not an effective listener or relationship builder, which can hold him back as a leader. His Energy &

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Drive for leadership is strong, though he tends to “march to his own drummer”. This can be very good for you if his leadership goals align with yours, but can be viewed as “stubbornness” or “rigidity” where his goals do not align with yours.

John was also assessed with the Work Life profile, which measures project leadership rather than people leadership. In this case, John is very much oriented to doing work and doing it to high standards. As a project manager, he tends to think “outside the box” and always puts efficient production ahead of following the rules or pleasing others. His Energy & Drive in this role is moderate, at best. He is very clearly focused on a future in leadership.

CONCLUSION / DEVELOPMENT: *John is crystal clear about what he wants in a leadership role—so be sure to have that discussion with him before laying out any plans or direction.* Assuming he is happy to remain at XYZ Advertising, and sees more to achieve, his leadership style suggests a lack of understanding of basic leadership competencies; John may benefit from coaching and development to improve his listening and delegation skills. I would stress that given his role and the need to be comfortable with directing others and confronting bad behavior—we are not looking to turn him into a people pleaser, but to improve his non-communicative non-engaging style.

Dick—We measured him both for Leadership and Work Life (Project Management)—and though he identifies marginally more strongly as a leader than a doer, he is highly disengaged from both roles. His Leadership Style is quite effective as a “Delegator”: He is excellent at assigning responsibility and following up to assure people complete their duties—he reads people very well and is a capable relationship builder.

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He has a flexible profile for project work or “doing”—he can do it all! As noted, his Energy & Drive for both roles is quite low.

His natural behavior style is to be highly focused on results and getting things done, though he has an approachable and friendly side. He adapts to work with a stressful “CYA” style (this could be from the way he is managed, or coming from internal conflict). He is powerfully motivated by PEACE & HARMONY (avoiding conflict), and his next two strongest motivators are KNOWLEDGE & DISCOVERY (learning) and HELPING OTHERS. His motivators appear to stand in contrast to his “get it done” behavior style, and may contribute to his disengagement as a leader—as leadership implies a degree of conflict.

Concerning conflict with Kathy: They both lead from plans and are highly organized. If they should disagree on something—they are both smart and “know” what is right and may find it difficult to compromise. Add to this that Dick can be outspoken and serious, he writes off Kathy’s “nice” style as silly and not serious; she cannot possibly be right. Complicating any contentious relationship, he is both attracted to and repulsed by conflict—so part of him wants to “go to battle” and part of him wants to hold it all in and avoid the battle. He is internally conflicted, which may explain his adaptation to a “CYA” behavior style.

Concerning conflict with Jane: As with Kathy, Jane is smart and has a plan; and Dick has his own plan. The difference with Kathy is that Jane will go to battle without hesitation and Dick often feels “outgunned” by Jane, which can be frustrating for him. Jane and Dick are both discontented and this negativity colors all their interactions and work.

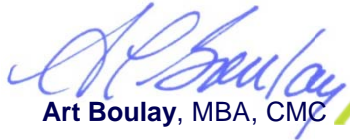
CONCLUSION / DEVELOPMENT: The first step is to sit down with him, if you have not already, to uncover the source of his disengagement and pessimism. Explore both his goals—they are moderately clear for

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leadership—and what he likes/dislikes about his work. I suspect that you may uncover personal issues are driving his discontentment—this may be from a temporary personal setback or situation. He will pose a challenge to any coach, but he has to deal with his discontentment / negativity before his leadership talent can be effectively applied.

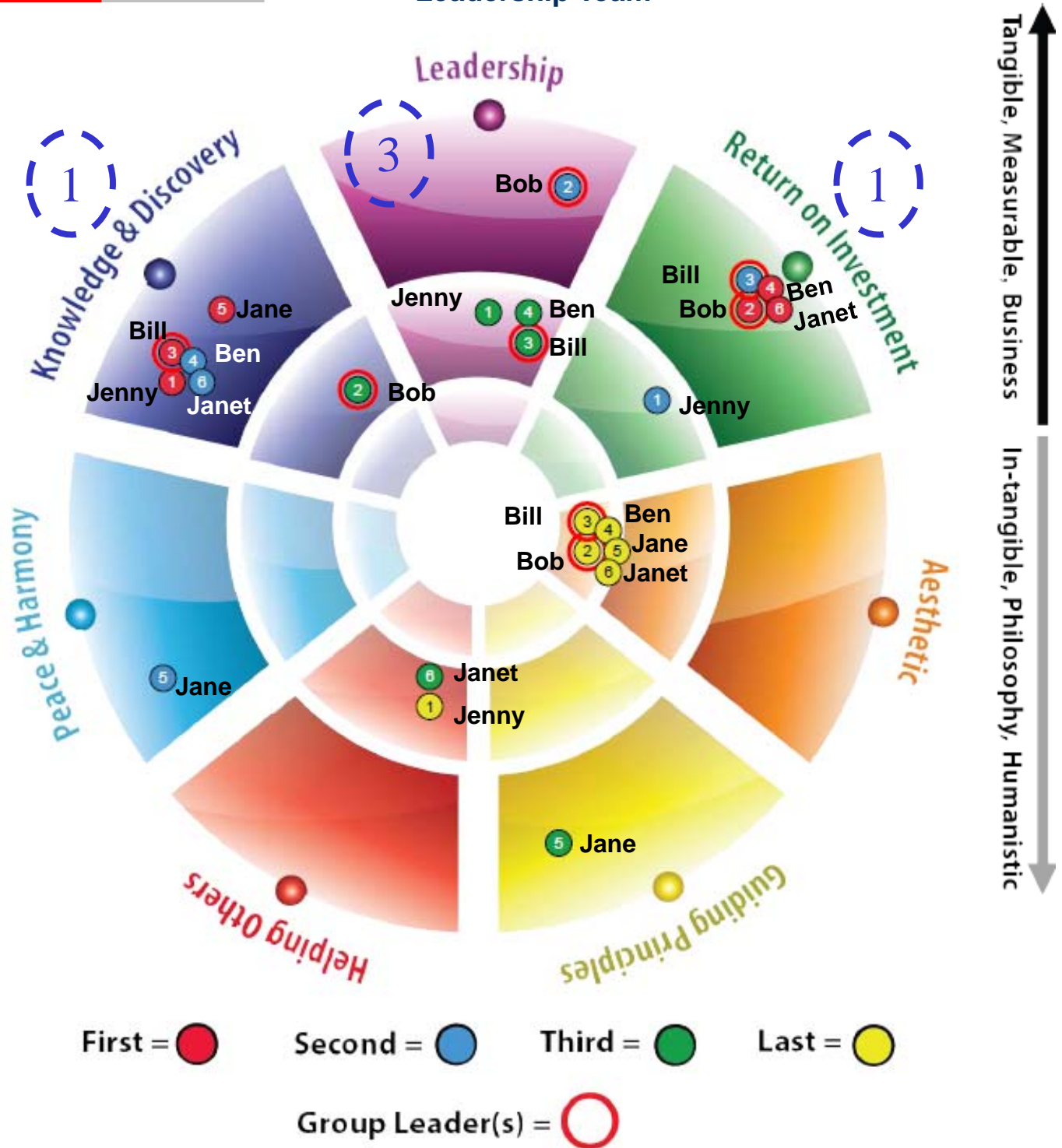
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Art Boulay, MBA, CMC / CEO

**Your employees are your Brand,
And your Brand is your Business.**

Motivators

Culture/Management Study—August, 2017
Leadership Team



OBSERVATIONS: Motivators are closely associated with success in a position. It is not surprising that business owners and senior managers tend to be driven by the three “business” factors at the top of this chart (Knowledge & Discover, Leadership & ROI). Owners/senior managers are sometimes split between “business” factors and Aesthetics (creativity)...XYZ is all business.



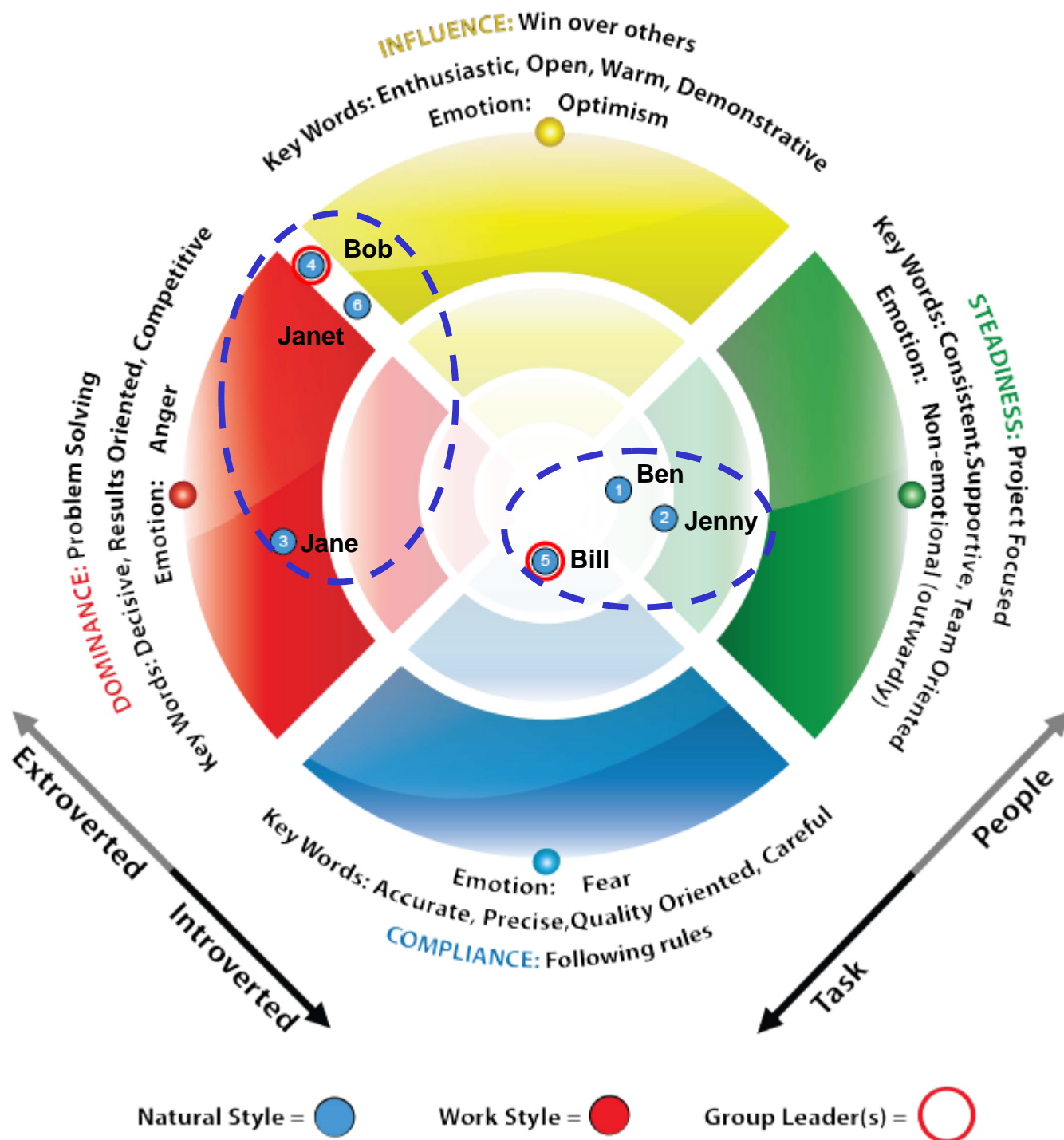
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Behaviors

Culture/Management Study—August, 2017

Leadership Team: Natural Style

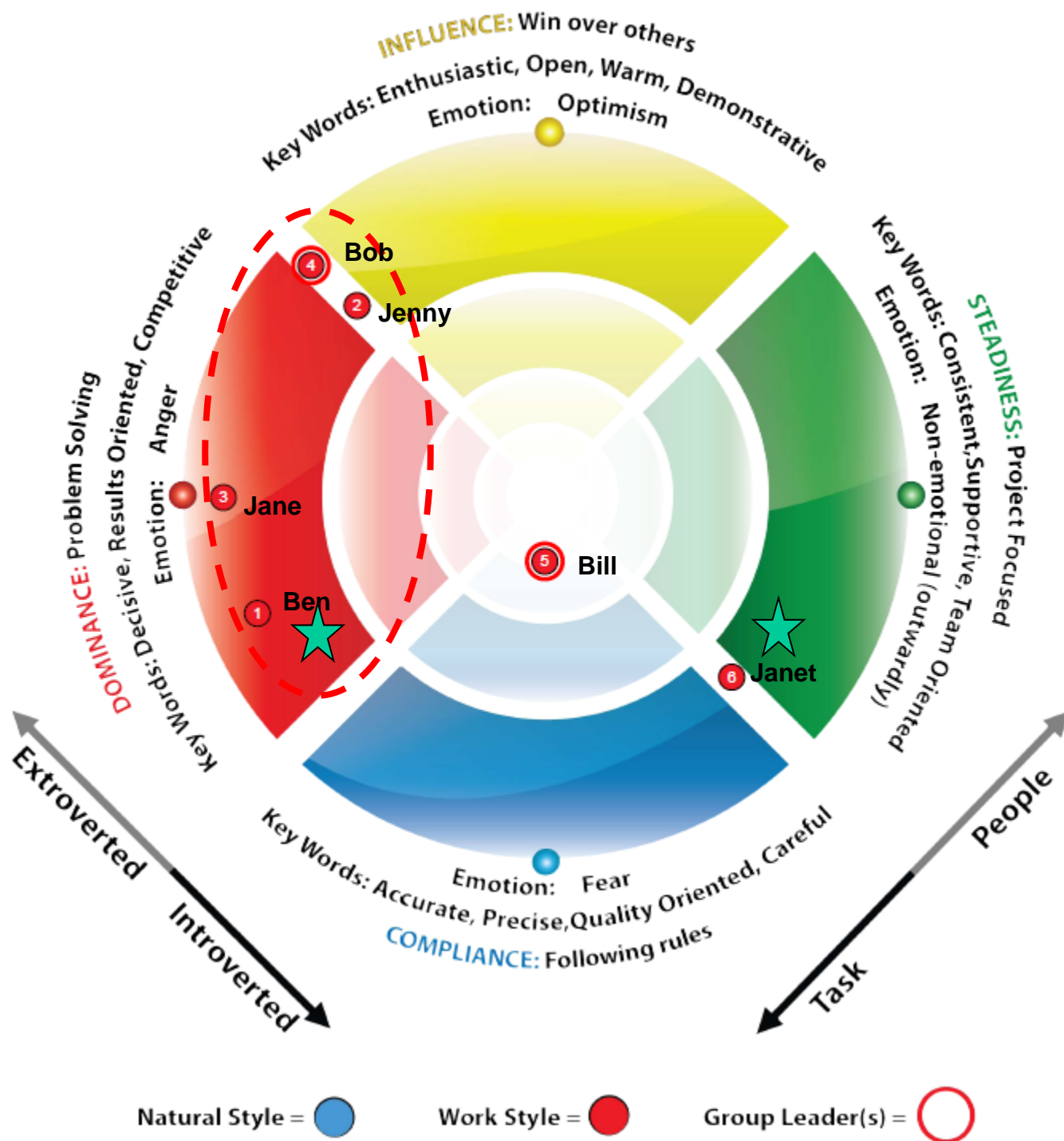


OBSERVATIONS: Behavior is not predictive of success on the job, though more extroverted types are often attracted to management (Bob, Janet & Jane). Extroversion/Introversion is not an either/or situation. Ben, Jenny & Bill have elements of extroversion, though other factors are stronger and “pull” them to the middle of the chart. There can be communication issues between these two groups as extroverts tend to dominate air time and do not always listen well.

Behaviors

Culture/Management Study—August, 2017

Leadership Team: Adapted Style

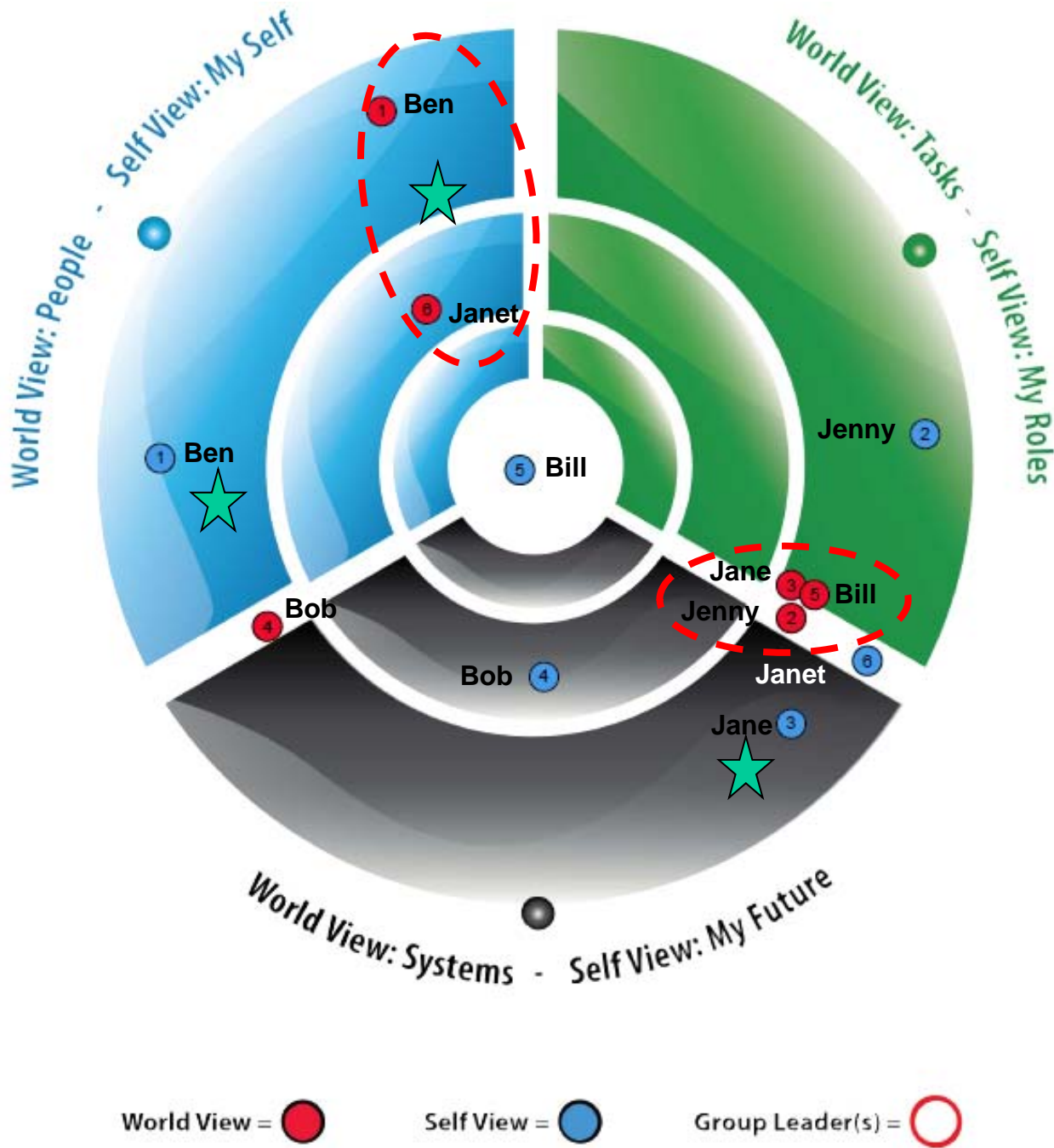


OBSERVATIONS: This chart shows how the leaders adapt from their Natural style (previous chart) to their Work style. Notice that Jane, Bill & Bob do not change much—while Janet, Ben and Jenny move a good deal. There is always a rationale behind people's work adaptations. 4 of the 6 leaders move to the extroverted more controlling side of the chart—except Janet who becomes more quality focused and introverted. *Janet & Ben (starred) are adapting a "CYA" mentality.*



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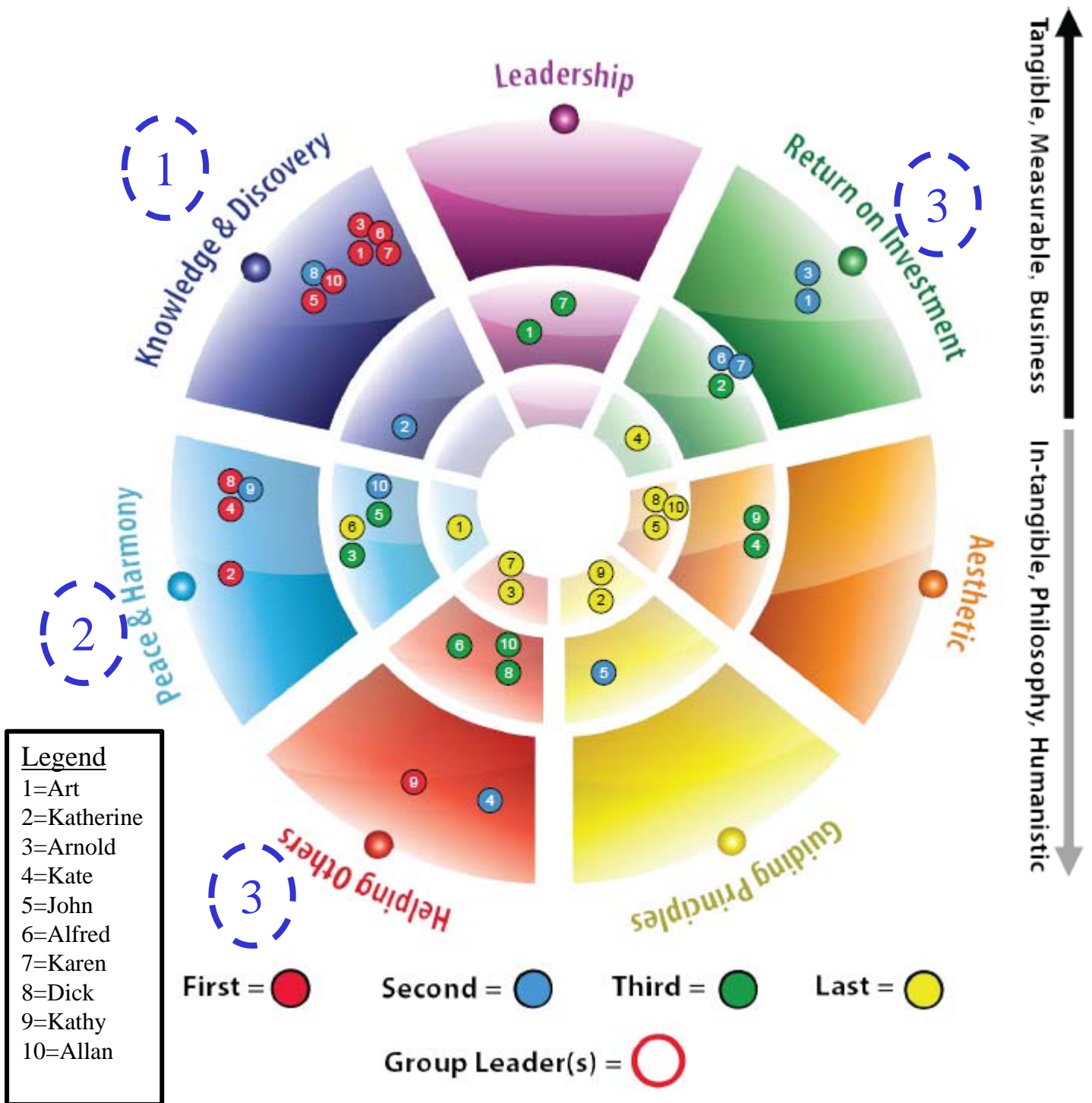


OBSERVATIONS: The circled group (lower left) lead from “Efficiency” and Bob leads as a “Delegator”. Ben & Janet (starred) lead as “Communicators”—and may have problems saying “no”. It is not a coincidence they adapt a “CYA” mentality (behavior chart)—they are under pressure to perform.

Everyone is somewhat pessimistic about the future, *which reflects on Bob & Bill*. Jane & Ben (starred) both show disengagement from their work, which needs to be explored.

Motivators

Culture/Management Study—August, 2017
Managers



OBSERVATIONS: The CULTURE is **Knowledge & Discovery** and **ROI** as the top factors, and **Leadership** in “3rd” position. The managers are more intensely motivated by Knowledge & Discovery than the leaders—and less intensely by ROI than the leaders. Notably, the managers 2nd strongest motivator is conflict aversion (Peace & Harmony)—and they tend not to be motivated by Leadership (though this does NOT mean they cannot lead or have no interest in leadership).

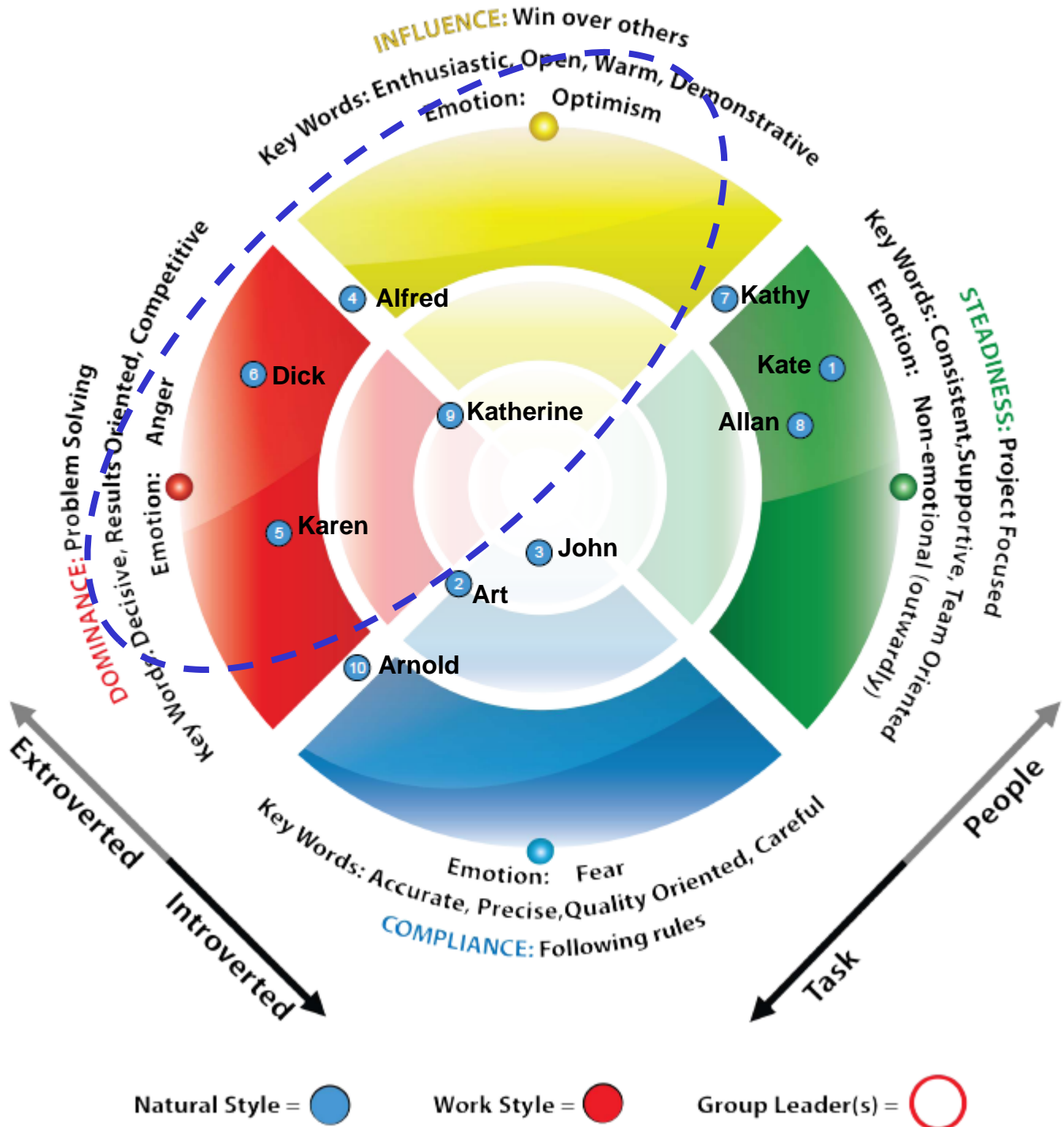
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Behaviors

Culture/Management Study—August, 2017
Managers: Natural Style



OBSERVATIONS: Notice that nearly everyone's Natural style is extroverted (or borderline). This is typical of managers/leaders as the extroverts "get the attention" and often seek out these opportunities.

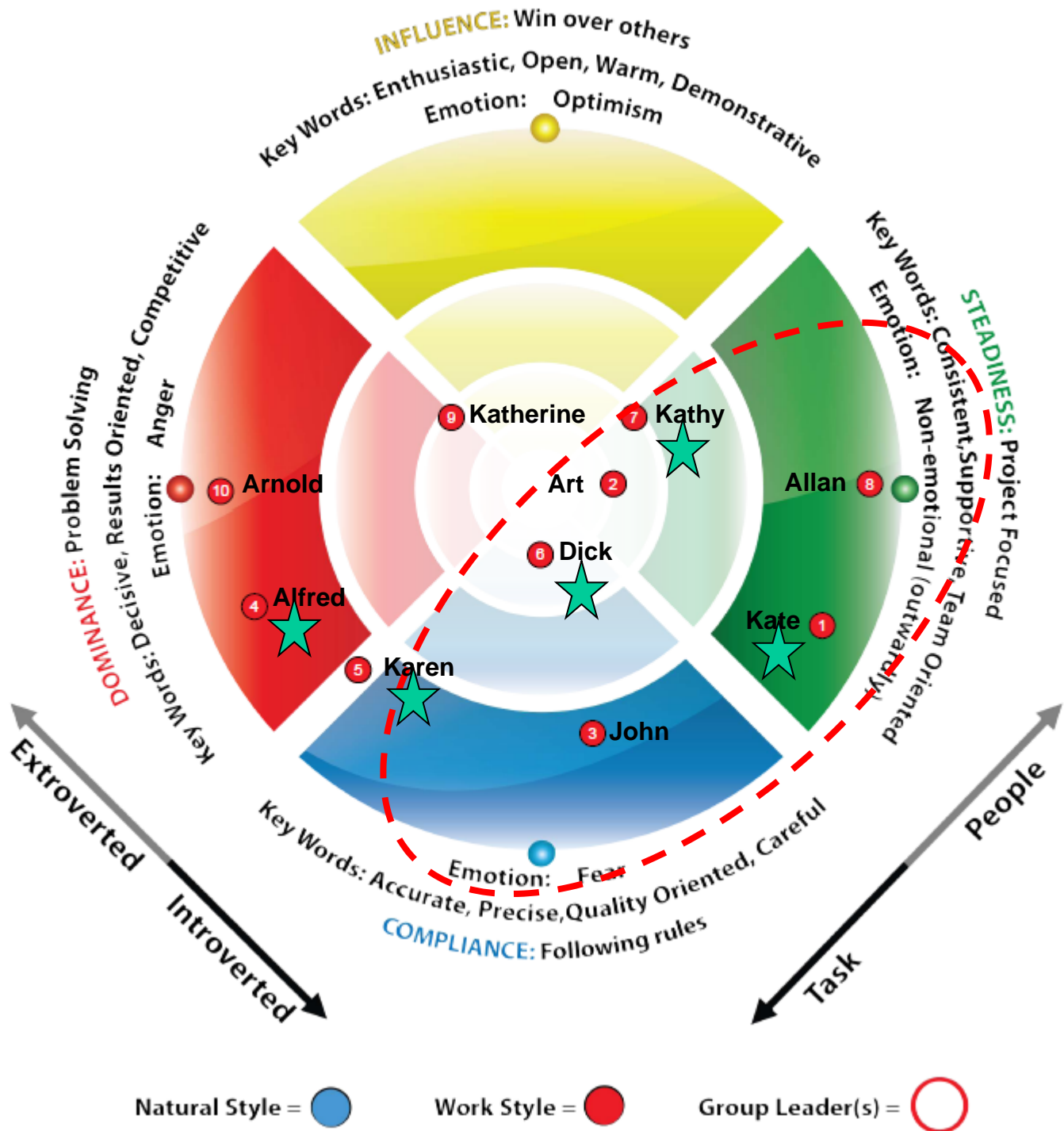


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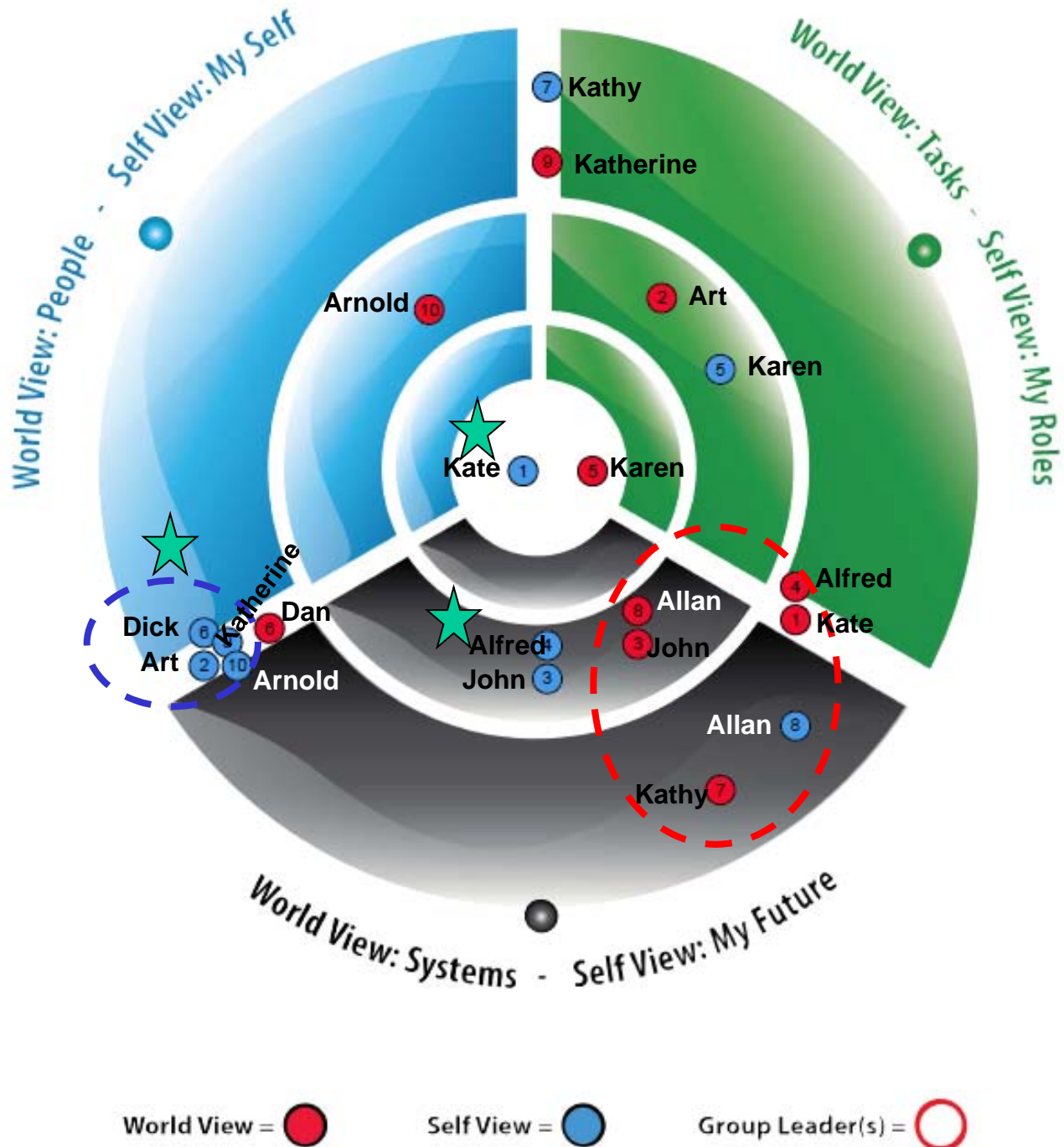
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Behaviors

Culture/Management Study—August, 2017
Managers: Work Style



OBSERVATIONS: This chart shows that almost everyone who is Naturally extroverted flips to a Work style that is decidedly more Introverted. This is a stressful change, and while the reason may be different for each individual, *for the starred individuals (Kathy, Karen, Alfred, Kate & Dick in particular) it may be a response to day-to-day management behavior..*



OBSERVATIONS: The team exhibits various, but generally effective Leadership styles. The circled group in the lower right tends to lead through Planning or Efficiency and is relatively light in relationship building—most of the others are stronger on relationships and relatively weak in other areas.

Half of this group is pessimistic about the future—a leadership issue. The 6 starred individuals (including the 4 in the circled group to the left) show disengagement from their leadership role, which needs to be explored.