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We solve your people challenges.

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BrandSmith

CULTURE & MANAGEMENT STUDY

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Presented To: Charlie Smith, President

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INTRODUCTION

This report describes the company culture and individual communication and management styles based the assessments of the four people you identified as the key leaders of the organization. Included in this report are summaries of each person's individual results, their strengths, potential, and areas for development. The immediate purpose of this information is to understand the capacity of your current team members, how they will react to the addition of a VP of Client Services to the team, and to give you some insight into effectively vetting the candidates for that role. The culture is represented in graphics which may help you see what the following text is explaining. Note that the graphics are presented in this order:

- Motivators (what drives values and culture)
- Behavior Styles (how everyone communicates and is perceived)
- Competencies (leadership style, attitudes, energy & drive)

KEY ASSESSMENT TERMS

BEHAVIOR is a key indicator of how people are perceived by others and particularly, how people communicate with others.

The bottom line is that behavior is *not* predictive of success and that *any behavior style can successfully perform any role*, which is why behavior-oriented assessments like DISC or MBTI alone cannot be used as “hiring” or “culture” assessments. That being said, behavior is the first impression we make on others and an accurate behavior instrument provides useful information about how one might need to change in order to communicate effectively with clients, colleagues, and vendors and predict how a candidate for hire or promotion may fit in with others.

D – Dominance: Extroverted, Task-Oriented

Self-confident, assertive (even aggressive), risk taking, results focused, big picture

I – Influence: Extroverted, People-Oriented

Charming, enthusiastic, social butterfly, optimistic, talkative, visionary, approachable & friendly

S – Steadiness: Introverted, People-Oriented

Patient, team player, good listener, non-communicative, quiet and friendly, focused on quality relationships

C – Compliance: Introverted, Task-Oriented

Precise, analytical, perfectionist, serious, quiet, focused on quality outcomes

MOTIVATORS are a key indicator of why people do what they do.

Useful to *predict success* in a role or conflict within a group. This assessment tells us what spurs one to action, and so provides clues about the type of culture, industry, or role in which one may be suited to work. Motivators provide clues to blind spots people may have interacting with others, and therefore how-to enhance communication and influence.

Business Motivators:

Knowledge & Discovery – Values gaining knowledge on specific topics and/or general knowledge

Leadership – Values leading oneself to success and recognition and/or leading a group toward achieving goals

Return on Investment (ROI) – Values gaining or saving money and/or a gaining a good return on an investment of time and energy

Humanistic Motivators:

Aesthetics – Values looking good personally and/or beauty in the world around them (nature and art for example)

Guiding Principles – Values following one's own belief system and values and/or ethics and laws of society

Helping Others – Values helping individuals and/or helping groups of people in larger social cause

Peace & Harmony – Values finding balance and avoiding conflict within oneself and/or within the world around them

COMPETENCIES provide insight to “leadership” (capacity and attitudes), and energy and drive for performance.

Competencies shed additional light on attitudes and approach to one’s role. It is based on a psychological instrument that reveals beliefs, attitudes, and emotional biases to definitively answer the question, *will one perform?* These assessments are particularly useful to improve interviewing, coaching, and development initiatives, and to inform hiring selection. Perhaps the most important information concerns energy and drive for performance. Besides telling us how much “fuel” is in the tank, it can pinpoint where to make investments in coaching, development, and education to generate the desired result. Competency assessments provide enormous insight for solving people challenges.

World View: People – people oriented, relationship building, listening; and emotional bias concerning harmony and conflict

World View: Tasks – results oriented and practical, maintaining relationships; and emotional bias concerning team achievement and problems

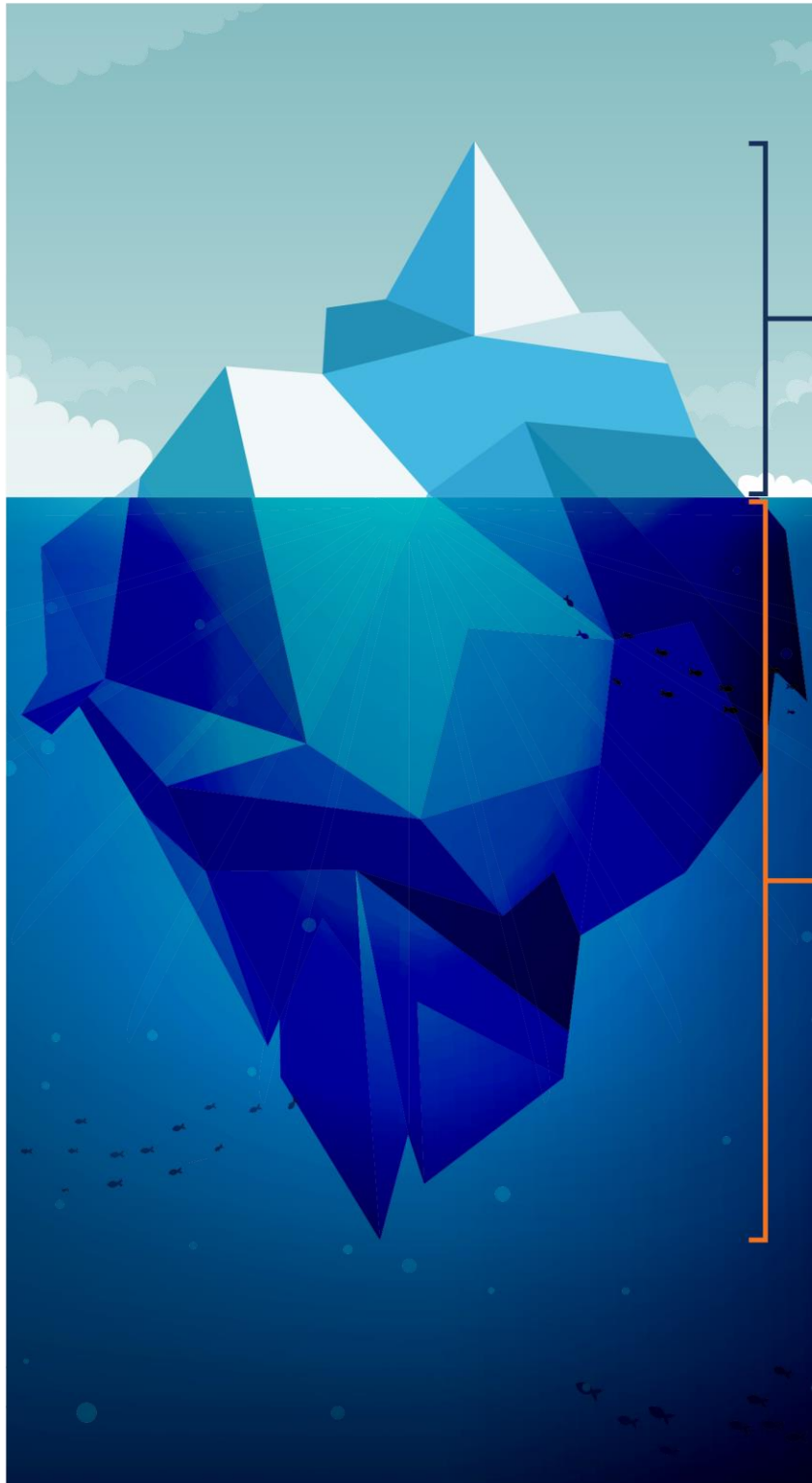
World View: Systems – strategy planning and goal oriented; and emotional bias concerning the benefits and problems with systems and rules

Self-View: My Self – appreciate of one’s worth and value; and emotional bias concerning personal potential and short-comings

Self-View: My Professional Role – understanding and engagement with one’s role; and emotional bias concerning peak performance or problems

Self-View: My Professional Future – clarity about personal goals and direction; and emotional bias concerning attaining one’s goals or experiencing setbacks

HOW THE ASSESSMENTS ARE RELATED



Behaviors

How one is perceived to perform (Communication Style)

Behaviors are visible and observable. They are not about us so much as how we are perceived by others. We are judged by how we communicate and interact with others.

Motivators

Why one performs

Motivators shape Behaviors. They show how we determine the importance of people and things around us and what spurs us to action.

Competency

Will one perform (Capacity, Attitudes, Energy and Drive)

Competency shapes both our Behaviors and Motivators. It informs how we think about the world around us and ourselves. Competency includes attitudes, beliefs, energy and drive.

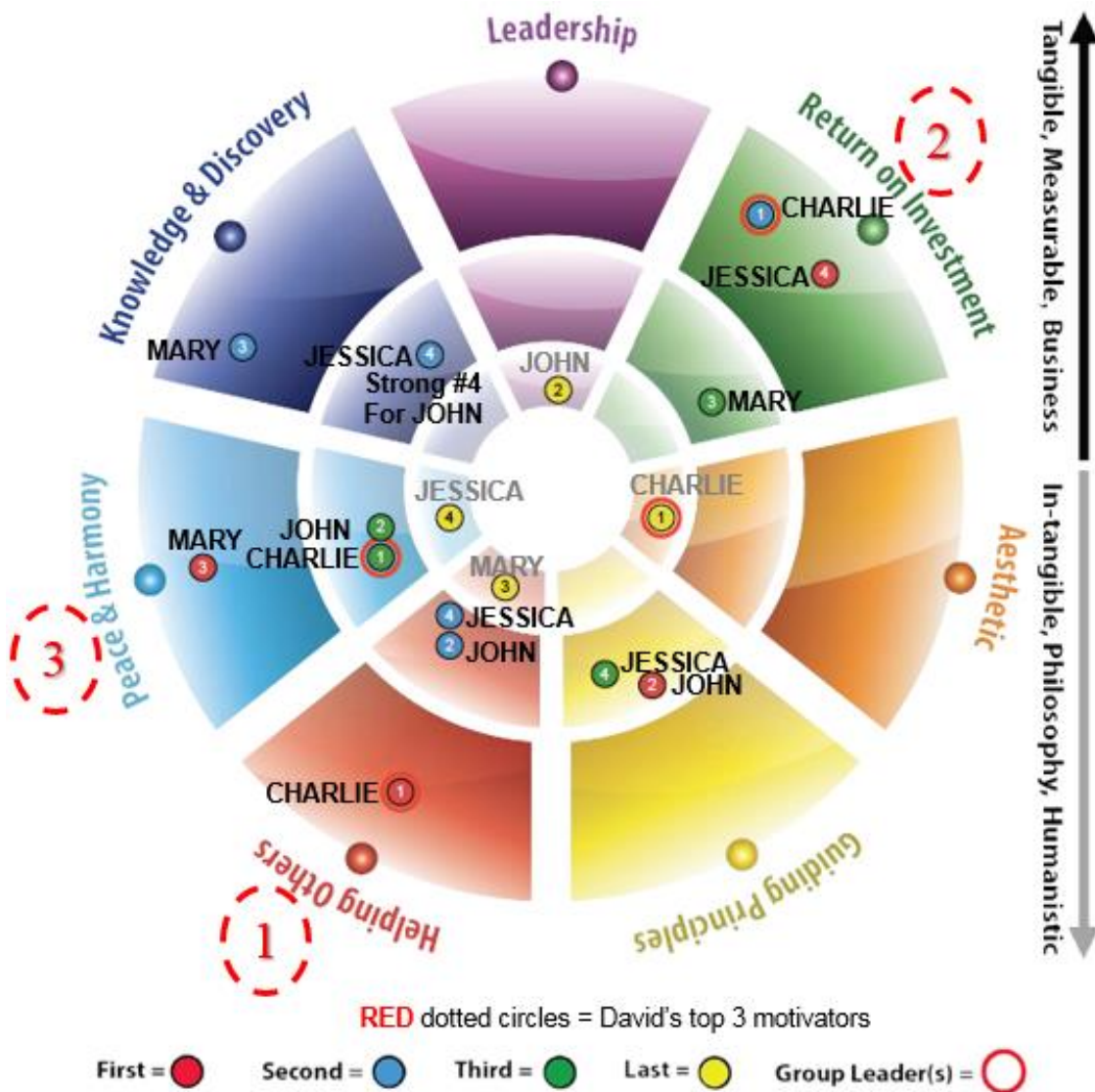
Attributes

Predict performance (Common Business Success Factors)

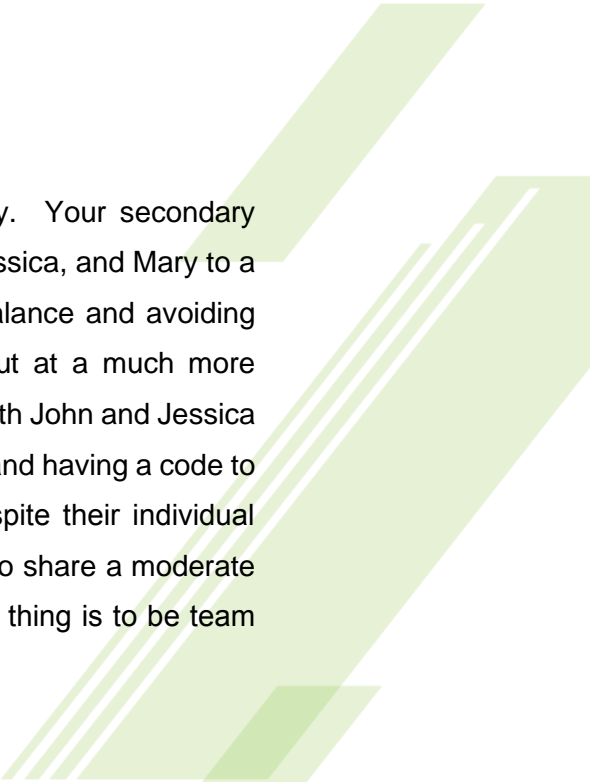
Attributes are specific factors common in business and organizational life that speak to our predicted performance.

CULTURE & MANAGEMENT SUMMARY

Motivators



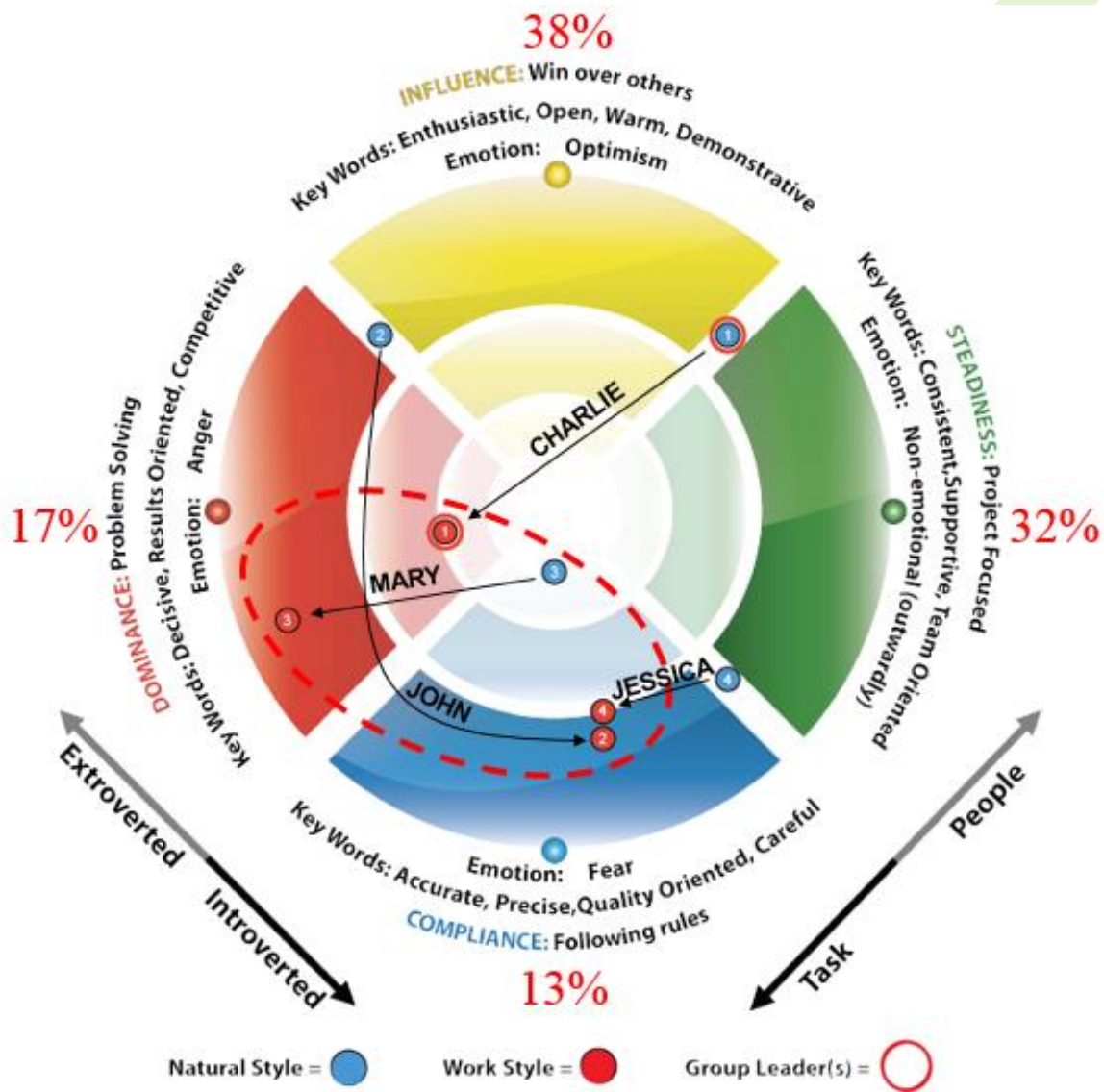
Although they don't tell the whole story, motivators are a key indicator of an organization's culture. In small companies such as yours, the culture is largely defined by the owner(s) and the BRANDSMITH culture as defined by you, Charlie, could best be described as, "Keep calm, help our customers, and make money doing it". Your primary motivation is to be helpful and service oriented, a quality shared at a more moderate level by



Jessica and John, but notably of little value to Mary. Your secondary concern is for the bottom line which you share with Jessica, and Mary to a lesser extent. Mary's primary focus is on work-life balance and avoiding conflict, which is also a factor for you and John, but at a much more moderate level. Guiding Principles comes in to play with John and Jessica which is the idea of being concerned with rules, laws, and having a code to live by – do the “right” thing in the “right” way. Despite their individual rankings, their scores are both moderate and they also share a moderate Helping Others focus indicating that part of the “right” thing is to be team and service oriented.

Behaviors

Behavior assessments are useful in determining where we are in the universe of human behavior, and where others are, so that we can best determine how to adjust our style to match or complement another. This is how one connects and builds rapport with others. Behavior alone cannot explain the full measure of conflict, communication, or relationship issues and they are not consistently useful to predict success in a particular role. For that information, we turn to STM's other two assessments.

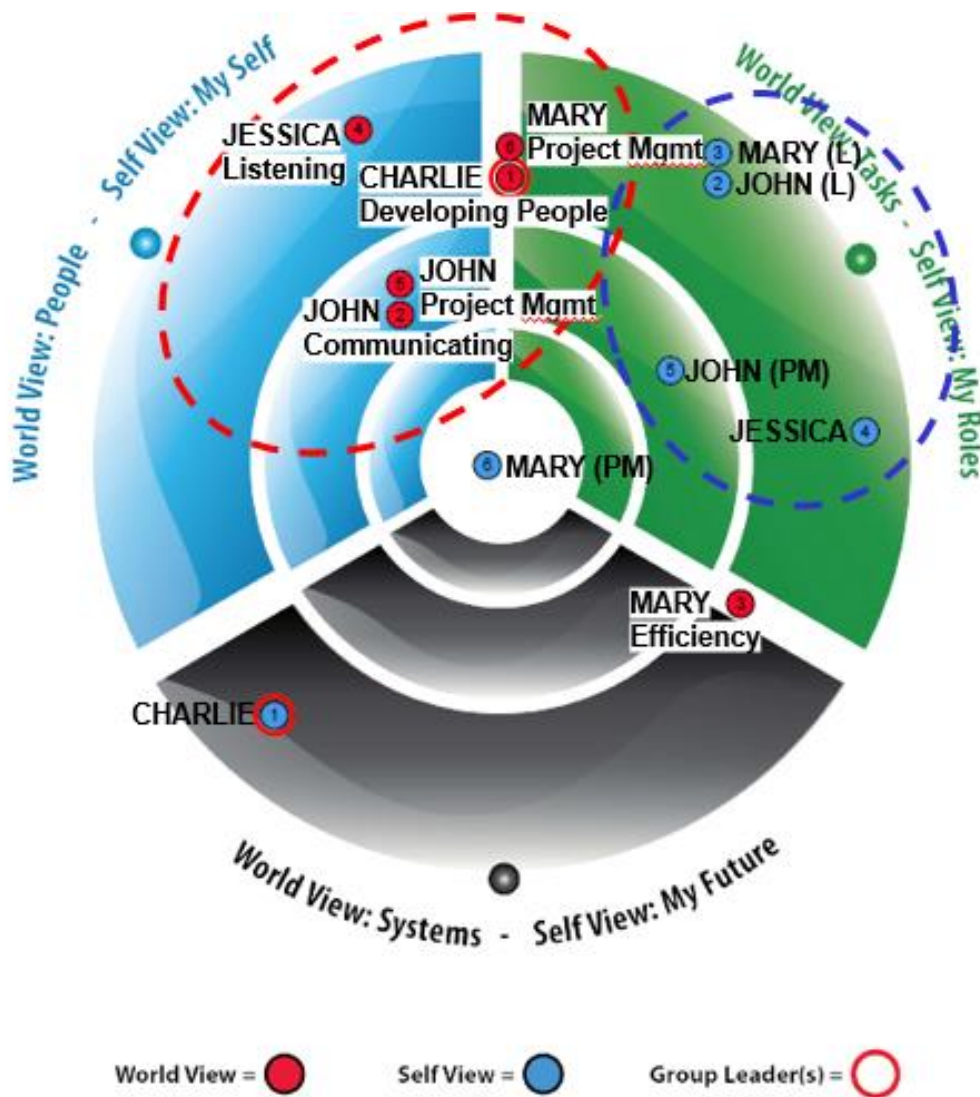


Behaviors tell us *how* one is perceived by others and their approach to communication and problem solving. Note there is a Natural Style (blue dots, the 'real' you) and an adaptation at Work Style (red dots). The closer the dot to the outer edge, the stronger and purer that style, the closer to the center means greater flexibility. The dashed circle shows how everyone follows your lead in adapting to a task-oriented WORK style and the percentages around the graph indicate the approximate percentage of the general population with each behavior style.

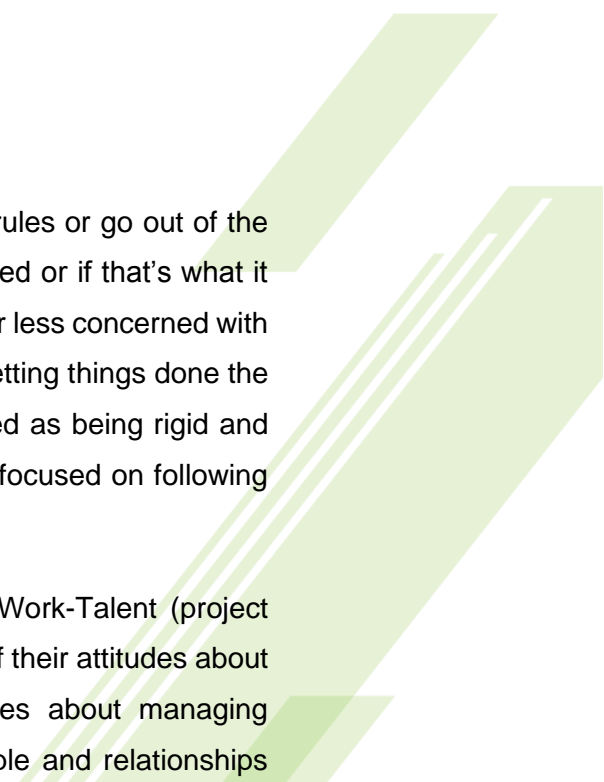
You tend to be more people focused, while Jessica, John, and Mary are on the cusp between people and tasks and likely fall in one camp or the other depending on what they perceive is appropriate for the situation at hand. You all show conflict or stress in your NATURAL styles that you each resolve by adapting to be more focused on tasks, quality, and getting the job done.

Competencies

The next graph shows the group's Leadership and Work-Talent (Project Management) Competencies as indicated by the red dots. The blue dots concern Energy & Drive, which is more personal and dealt with primarily in the individual write-ups that follow.



All your leadership styles are different, but for you, Jessica, and John the are primarily focus is on people and relationships with a secondary focus on practicality and getting things done. The three of you are creative



problem solvers and you won't hesitate to bend the rules or go out of the box if you think it is what's best for the people involved or if that's what it takes to get the job done. Mary on the other hand is far less concerned with people and relationships and more concerned with getting things done the right way according to a plan. She may be perceived as being rigid and inflexible by the rest of you because she is so laser focused on following the plan and rules to the letter.

In addition to the Leadership profile, we used the Work-Talent (project management) assessment on John and Mary to see if their attitudes about managing projects was different from their attitudes about managing people. For John, it was much the same with people and relationships being his primary focus. There is a slight difference in that as a project manager or 'doer' he understands and appreciates systems and planning more so than he does as a leader. His self-view (energy and drive) is similar as well. With Mary we saw a drastic difference in both her attitudes (world-view) and energy and drive (self-view). As a project manager she is far more focused on people and relationships and significantly less concerned with systems, structure, and planning. She is more confident in her abilities in this role and sees her future more clearly.

In terms of self-view (energy and drive) you may see some problems in your present situation but are clear about and open to what the future holds – you know where you're headed and have some notion of how you're going to get there. Your team, on the other hand, are very engaged and positive about their leadership roles and their work in the present but are unclear and pessimistic about the future. Perhaps you have plans that you're excited about but have not communicated, but they do not share your vision or enthusiasm for what's to come.

INDIVIDUAL ASSESSMENTS

CHARLIE SMITH

Behaviors	Natural	Work	Change
Dominance	4.9	7.4	2.5 Up
Influence	5.6	3.6	2.0 Down
Steadiness	5.6	5.8	0.2 Up
Compliance	3.9	3.1	0.8 Down

ASSESSMENT HIGHLIGHTS:

Your NATURAL BEHAVIOR tends to lean toward being people oriented but you also have a healthy dose of task

focus. You are friendly, enjoy people interaction, and you're a team player. You are comfortable in social situations but are more comfortable in the company of trusted friends and colleagues. You generally prefer to wait out problems and difficult encounters rather than confront them. Your scores are close across all four behavior styles which indicates a flexibility and an ability to adjust in order to connect with other people but it can also be stressful for you in trying to be all things to all people

Your WORK BEHAVIOR is more assertive and task oriented. You have a stronger sense of urgency to get things done and unlike your natural style, you choose to go after solutions to problems rather than waiting them out. You follow your own plans and are a quick decision maker and problem solver. You maintain your focus on being a helpful team player, but that takes a backseat to getting the job done.

Note that under high stress everyone tends to revert to their natural behavior style.

TOP 4 MOTIVATORS

1. **Helping Others 8.1**
2. **Return on Investment 7.9**
3. **Peace and Harmony 6.4**
4. **Knowledge and Discovery 4**

Your primary MOTIVATORS are Helping others, Return on Investment (both very strong), and Peace and Harmony. You highly value being supportive

and of service, but you balance that with an equally strong appreciation for practical results and the bottom line. Your secondary focus is on making sure things run smoothly so that you can enjoy a balanced and conflict-free life and environment. In summary, you want to stay calm and help people which is why you pursue profits. Personally you tend to make money and give it away.

COMPETENCY ASSESSMENT 1/1/2022

VIEW	People (I)				Tasks (E)				Systems (S)			
World:	8.5	H	S	S	8.6	H	OF	S	7.9	H	UF	S
Self:	7.0	H	S	S	5.8	M	UF	OF	8.2	H	S	UF

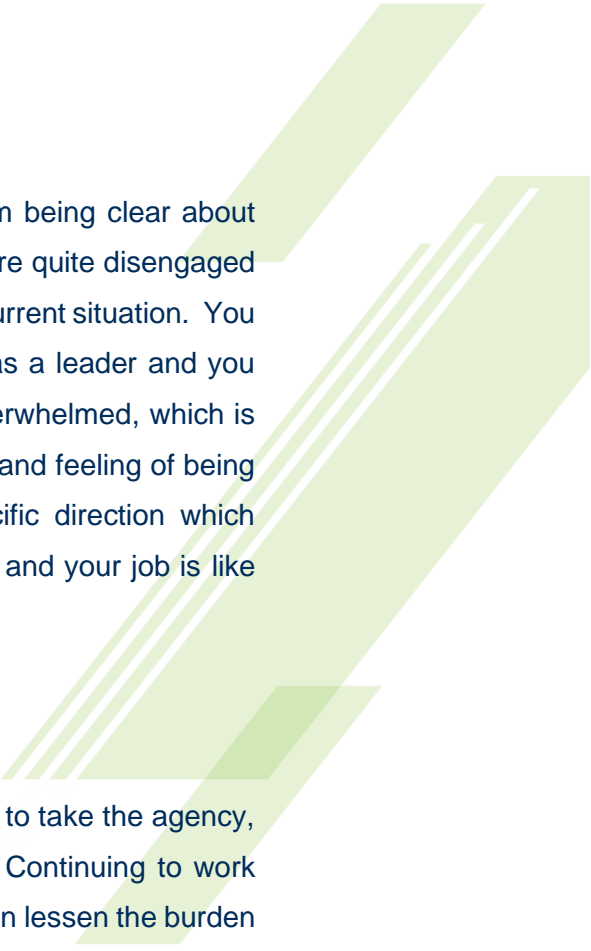
(I=E)>S

S>I>E

Social/Facilitator

Driven/Persistent

Your LEADERSHIP STYLE is *developing people*. You have the capacity to read people well, be a good listener and communicator, and understand the importance of having strong relationships. You are also very practical, which is consistent with your “get it done” attitude and appreciation for bottom line results. You see a lot of value in getting things done and you know how to effectively lead your team to successfully achieve goals and objectives. You are less focused on systems and planning and you won’t hesitate to break the rules or deviate from the plan if they’re getting in the way of maintaining relationships or getting things done. You don’t like to be micromanaged and don’t want to micromanage others – you want to do things your own way and you allow others to do so as well rather than dictating specific directions or expectations. That is fine if you have a team of seasoned people who are comfortable with ambiguity and can just take a rough idea and run with it. However, greener team members or those who crave more structure will need to be more closely managed. Mary in particular is highly systematic and uncomfortable with uncertainty. She is craving specifics and direction that you may not be giving her.



Your ENERGY & DRIVE for performance comes from being clear about your future and open to possibilities. However, you are quite disengaged from your role and see significant problems with your current situation. You tend to be hard on yourself and doubt your abilities as a leader and you recognize that you are overworked, perhaps even overwhelmed, which is sapping your energy and drive. Your disengagement and feeling of being overworked is directly connected to not giving specific direction which means you are not getting the results you really want and your job is like “herding cats”.

SUMMARY AND RECOMMENDATIONS:

Although you have a clear idea about where you want to take the agency, the path for you to make that a reality is uncertain. Continuing to work toward getting the right people on board in key roles can lessen the burden you’ve placed on yourself and allow you to be more satisfied and fully engaged in taking the practical steps today that will bring you closer to future you envision. You may not be managing the resources you have clearly enough in order to get the most from them.

When we look through the lens of all three assessments, we see a culture that is to be whoever you are and do things however you want to do them. Is that really working for you? You need to develop clarity around corporate goals and be comfortable communicating those to your team. This likely fits in well with the work you are doing with Craig Barnes.

JESSICA JONES

Behaviors	Natural	Work	Change
Dominance	5.0	4.7	0.3 Down
Influence	4.3	5.0	0.7 Up
Steadiness	5.6	4.8	0.8 Down
Compliance	5.1	5.5	0.4 Up

ASSESSMENT HIGHLIGHTS:

Jessica's NATURAL BEHAVIOR is that she tends to be a quiet and people-oriented team player. However, her focus on tasks is

also fairly strong and under heavy pressure she may struggle with an internal conflict between 'get it done' and 'get it right'. She wants to get things done quickly but not at the expense of quality and precision. She, like you, has a "tight" behavior with all scores being close together. She is flexible but this also can cause a great deal of stress. She may come across to others as moody and unpredictable.

In Jessica's WORK BEHAVIOR, her concern for quality increases as does her focus on relationships and building rapport. She is polite and cooperative with people, but also quality conscious. This shows an ability to be flexible with how she communicates so she can connect with a variety of people, but because of this ability to be a "chameleon" you may not know which Jessica you're going to get in any given situation.

TOP 4 MOTIVATORS

1. **Return on Investment 8.5**
2. **Knowledge and Discovery 5.6**
3. **Helping Others 5.6**
4. **Guiding Principles 5.5**

Jessica's primary MOTIVATORS are Return on Investment (very strong), Knowledge and Discovery, Helping Others, and Guiding Principles. Making

money and avoiding wasting her time and effort are extremely important to Jessica. This focus on results and the bottom line is generally a great quality to have in your #2, but Jessica's ROI focus is so strong and so much more significant than anything else that drives her that it raises a concern for short-term thinking – making a dollar today may be more important than

playing a longer game for a greater reward. In a distant second place, she places equal emphasis on learning, supporting the team, and doing the right thing. She has the capacity to be a good trainer and mentor, but because of her very strong ROI she will only be interested in doing this with people who she feels are worth her time and effort.

COMPETENCY ASSESSMENT												1/1/2022	
VIEW	People (I)				Tasks (E)				Systems (S)				
World:	9.7	H	OF	OF	8.1	H	S	UF	7.2	H	UF	UF	
Self:	6.7	M	S	S	8.6	H	OF	S	7.2	H	UF	OF	
I>E>S				E>S>I									
Empathetic/Collaborator						Expert/Knowledged-Directed							

Jessica's LEADERSHIP STYLE is *listening*. Her overwhelming focus is on people and relationships. She reads people well and is highly empathetic, and friendships, social relationships, and collaboration of primary importance to her. She counts on having mutual trust and respect with the people she works with. Her secondary emphasis is on practical tasks and execution which is in line with her very high ROI motivation, but it definitely takes a backseat to her concern for people. She is significantly less engaged with systems, procedures, plans, and the big picture. She won't hesitate to bend the rules if she thinks it better for the people involved. In fact, she has a tendency to be so accommodating that she may be too forgiving and have a hard time being assertive and directive in holding people accountable. Jessica is one of those people who appreciates your laissez faire attitude about management. She neither takes nor gives direction well.

Jessica's ENERGY & DRIVE for performance comes from understanding her role very well and being highly engaged. She is professionally anchored and is confident in her abilities to perform well. However, she tends to be very hard on herself and indicates that she feels unappreciated

and overworked. She is unclear and pessimistic about her future which is having a negative impact on her energy and drive and if not addressed, could affect her role engagement in the long run.

SUMMARY AND RECOMMENDATIONS:

Jessica understands that she still has room to learn and grow so she is likely to be open to coaching and development opportunities. Give them to her! She doesn't need (or want) a lot of specifics and structure but she could definitely benefit from having a clearer idea about what the future of the agency and her career looks like. Share your vision with her and involve her in creating the strategy and plan to move forward with its execution. Work with her to develop a personal career plan that supports those efforts and takes advantage of her natural engagement and enthusiasm for the work.

You had asked in an earlier conversation about Jessica's ability to be a strong #2. The answer is that she has the capacity but is not ready to move fully into that role today. Her focus on people is so strong and is such a priority for her that the concern is for his ability to balance that with getting practical results and creating the structure to move the agency forward. She may not understand or embrace the overall system and big picture which is a critical component of the "integrator" you're looking for. In addition to working with her on personal goals and the big picture for her career, I would recommend involving her in creating that big picture for the agency as a whole.

JOHN WALSH

Behaviors	Natural	Work	Change
<u>Dominance</u>	5.5	5.0	0.5 Down
<u>Influence</u>	5.5	4.4	1.1 Down
<u>Steadiness</u>	4.3	4.3	0.0 Equal
<u>Compliance</u>	4.8	6.4	1.6 Up

ASSESSMENT HIGHLIGHTS:

John's NATURAL BEHAVIOR leans toward being extroverted and he is equally focused on people and tasks. Like you and

Jessica, this is what we call a "tight" pattern in that the scores across the board are close together. This is flexible but stressful.

He shifts to a task-oriented WORK BEHAVIOR and he tends to be much more reserved and focused on quality, precision, and following the rules. There is likely a practical reason that he retreats from his naturally outgoing self. He puts his head down and just focuses on the task at hand, but it is a highly stressful adaptation away from his true self.

TOP 4 MOTIVATORS

1. **Guiding Principles 6.7**
2. **Helping Others 6**
3. **Peace and Harmony 5.7**
4. **Knowledge and Discovery 5.6**

John's primary MOTIVATORS are Guiding Principles, Helping Others, Peace & Harmony, and Knowledge & Discovery. John has strong beliefs and doing the "right" thing is of primary

importance to him. The caution is that if his idea of "right" is in conflict with others, he can appear rigid, inflexible, and be one to dig in his heels. This starts to explain his being blunt and thinking that his marketing competence is high – he knows what's what and he won't hesitate to tell you. Beyond that, he values helping people, being a supportive team player, and he has the capacity to be strong in customer service. Because he values learning, keeping things running smoothly, and being helpful, he also has the capacity to be a good coach or mentor and likely would welcome having someone be that for him in return.

Leadership Competencies

COMPETENCY ASSESSMENT 12/28/2021												
VIEW	People (I)				Tasks (E)				Systems (S)			
World:	9.0	H	OF	OF	8.2	H	S	S	7.8	H	UF	UF
Self:	7.2	H	S	OF	8.8	H	OF	S	6.7	M	UF	S
I>(E=S) <input type="button" value="v"/>					E>I>S <input type="button" value="v"/>							
Supportive/Affiliative					Professional/Role-Anchored							

Work-Talent Competencies (Project Management)

COMPETENCY ASSESSMENT 1/13/2022												
VIEW	People (I)				Tasks (E)				Systems (S)			
World:	8.8	H	OF	S	7.9	H	S	UF	8.3	H	UF	OF
Self:	7.8	H	OF	OF	8.5	H	S	S	7.8	H	UF	S
I>(E=S) <input type="button" value="v"/>					E>(I=S) <input type="button" value="v"/>							
Supportive/Affiliative					Performer / Multi-tasker							

John's LEADERSHIP STYLE is *communicating*. Like you and Jessica, he understands people very well and he values people and relationships above all else, but not quite to the extreme that we see in Jessica. He will go the extra mile to help whoever needs it and tends to put building relationships above all else. The question in his account management role is whether he can *maintain* those relationships. Does he follow through with the action necessary to deliver what he's promised? Although his high Guiding Principles motivation suggests that he likes to follow the "rules", those rules and following the chain of command must serve his relationships well. He is not good at making his expectations clear or holding people accountable and he will likely be very uncomfortable with anything that he perceives as being micromanaged. This is something to keep in mind as you bring in the VP of Client Services to manage him. If he doesn't agree with their rules and completely buy in to their plans, you're likely to see some pushback.

John's WORK STYLE is similar but he puts slightly less emphasis on practical details and is more of a creative problem solver and big picture thinker than he is as a leader.

John's ENERGY & DRIVE for performance as a *leader* comes from being very engaged in his role. He is relatively clear about his strengths and weaknesses as a leader but tends to overfocus on the weaknesses. He is so focused on what is happening in the present and really loves his work, but he doesn't see his future in leadership. He is unclear and pessimistic about the future and self-reports that he doesn't feel good about the direction of his career. As a *doer* (project manager) he has a similar profile but is slightly more confident in his abilities and she sees his future more clearly in this role.

SUMMARY AND RECOMMENDATIONS:

You asked if John is happy in his role and we do see high role engagement in both the leadership and project management assessments. However, he lacks the clarity and optimism about his future from both perspectives. He may be engaged and relatively happy with what he's doing *today*, but he doesn't see his *future* in it. Having a conversation with him about what he wants and creating a plan and path for him would be the first step in boosting that clarity and in turn, his overall energy and drive. Be very clear about what you see as his potential, but equally so about where he could benefit from professional development. He needs to be more clear and specific in communicating his expectations to others, learn to effectively delegate, and hold people accountable.

John has a tendency to think he knows what's "right" – what to do and how to do it, although he struggles to make her expectations clear leaving the rest of you to wonder what her version of "right" may be. He resists having systems, procedures, and rules imposed upon him which is something your new VP of Client Services should be aware of. It will take some extra effort

for him understand and buy in to what needs to happen and *why* it is important.

MARY JACKSON

Behaviors	Natural	Work	Change
<u>Dominance</u>	4.6	8.1	3.5 Up
<u>Influence</u>	6.3	3.4	2.9 Down
<u>Steadiness</u>	2.9	1.9	1.0 Down
<u>Compliance</u>	6.2	6.5	0.3 Up

ASSESSMENT HIGHLIGHTS:

Mary's NATURAL BEHAVIOR is conflicted. On one hand she is outgoing, friendly, and people-oriented but on the

other she is reserved and focused on tasks, production, and quality. People likely perceive her as moody because they don't know which Mary is going to show up.

She resolves this conflict in her WORK BEHAVIOR by shifting to being strictly task oriented and quite assertive. She is competitive, driven, and has a high sense of urgency. Although she is focused on results and expediency, she maintains a concern for quality and precision. She is highly control-oriented but this still leaves her conflicted – get it done or get it right?

TOP 4 MOTIVATORS

1. **Peace and Harmony 7.3**
2. **Knowledge and Discovery 6.9**
3. **Return on Investment 6.7**
4. **Guiding Principles 4.8**

Mary's primary MOTIVATORS are Peace and Harmony, Knowledge and Discovery, and Return on Investment. Mary highly values having balance in her life, particularly

work-life balance. She also values learning, making money, and getting a good return on her efforts – she doesn't like to waste her valuable resources. This is consistent with what we see in her leadership style in the next section.

Leadership Competencies

COMPETENCY ASSESSMENT 12/31/2021

VIEW	People (I)				Tasks (E)				Systems (S)			
World:	7.6	H	UF	S	8.6	H	S	S	8.8	H	OF	S
Self:	7.9	H	S	OF	8.9	H	OF	UF	7.1	H	UF	S

(E=S)>I

E>I>S

Efficient/Resourceful

Professional/Role-Anchored

Work-Talent Competencies (Project Management)

COMPETENCY ASSESSMENT 1/14/2022

VIEW	People (I)				Tasks (E)				Systems (S)			
World:	8.8	H	S	OF	8.5	H	S	S	7.8	H	UF	UF
Self:	8.6	H	OF	S	8.2	H	S	S	8.2	H	UF	UF

(I=E)>S

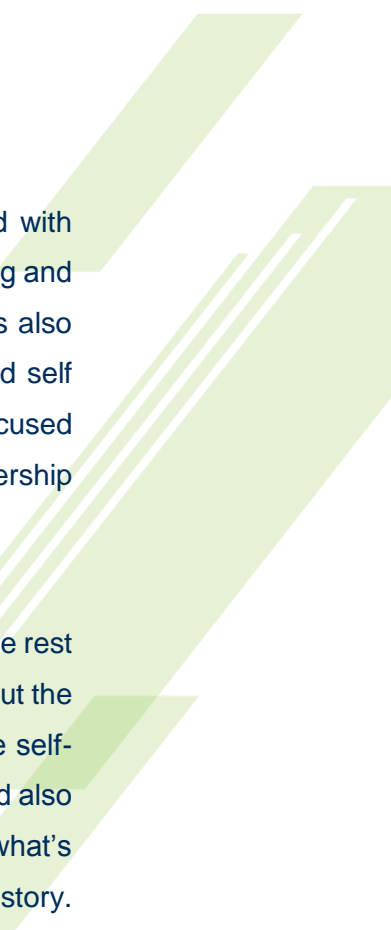
I=E=S

Social/Facilitator

Self-Actualized / Self-Transcending

Mary's LEADERSHIP STYLE is *efficiency*. She is a strategic thinker and is focused on getting things done and following the plan, procedure, or rules to the letter. In comparing leadership styles, Mary is highly focused on the exact things that you are not. She knows what needs to be done and how it should be done, and she will just do it herself rather than teaching or delegating anything. If she runs into problems, she will try to solve the problem herself rather than asking for help. Although she has the capacity to communicate specific expectations, she would rather roll up her sleeves and do it herself as a demonstration rather than taking the time to develop other people on her team. She tends to be so focused on what she's doing that she doesn't really connect with the people around her and she may come across as insensitive or distant but the truth is that she doesn't read people well and is oblivious to their reactions and feelings. She highly appreciates structure and direction. Give it to her!

Mary's WORK style is the opposite. Although she maintains the same emphasis on practical tasks, details, and getting things done, she is much



more concerned with people and relationships and less concerned with structure and planning, or the big picture. She knows what she's doing and doesn't need (or want) to be told what to do or how to do it. She is also comfortable in being her outgoing, friendly, and relationship-oriented self as a doer as opposed to a more buttoned up and task/process-focused leader. This is a sign of not understanding leadership - she does leadership like she does her work – she needs to learn to develop others.

Mary's ENERGY & DRIVE profile as a *leader* is virtually identical to the rest of your team – high role engagement but unclear and pessimistic about the future. She loves what she does but doesn't see a future in it. She self-reports that she doesn't feel good about the direction of her career and also indicates that she may not do what's best for the agency if it's not what's best for her personally. Her energy and drive as a *doer* is a different story. She is more confident in her abilities as a doer and has a clearer idea of where that may take her, but the path forward is still murky.

SUMMARY AND RECOMMENDATIONS:

In the doer role she has a high opinion of herself, is not open to growth, and may be bored which is why she wants a leadership role. But to be successful, she needs coaching. As a leader, she is highly structured and needs to follow a plan. In the absence of having one prescribed to her, she will create her own and do it her way. This attitude could be an issue when you bring the new VP as her manager. Including her in creating the systems, procedures, and plans moving forward will be important in keeping her engaged and increasing her future clarity.

Mary demonstrates good listening skills in her work style but could benefit from coaching to improve her active listening skills and take more time to make others feel heard in a leadership capacity. As a leader she is in the habit of providing her own structure and doing things herself, but she needs

to learn how to communicate her expectations, show people what she wants done, and then step back and let them do it. I highly recommend that you, or the new VP, work closely with her on goal setting and defining a clear career path with specific and measurable benchmarks.

NEXT STEPS

We provide this information to be immediately applicable in making key decisions and managing the relationships among your team. Typical next steps include:

- I will review this report with you to be sure I clearly understand the current situation and how you wish to proceed.
- Once the first step is complete, I recommend a presentation involving everyone who took an assessment. I will do a high-level review of this report and then meet with everyone one-on-one to answer their specific questions.
- Along with this report, I am returning everyone's assessments, so that you have a chance to review the materials and prepare your questions or comments, although though you need not wait until a scheduled meeting to ask questions.
- I will make myself available to you one-on-one if you have personal questions or concerns now or after our meeting.
- You can pass along everyone's assessment closer to our review with them or have me do so. **DO NOT SHARE THIS REPORT.**
- After we've completed the review, presentations, and individual assessment reviews, we can work together to determine the best path forward and how STM may contribute to your future success.

NOW WHAT?

This Culture & Management Study provides information to *diagnose* the source of your specific people challenges and *prescribes* some solutions. Now comes the pay-off: **plan, implement solutions, and measure your improvement.** There are various ways to leverage this information:

- Clearly define your organizational culture
- Establish benchmarks for future hiring
- Utilize STM assessments before hiring to ensure “fit” with the position *and your culture*
- Determine who is open to and will benefit from coaching *in specific areas*
- Coach employees to improve performance and leadership
- Make changes in the way you communicate with your people
- Reassign people to roles to which they are better suited
- Evaluate the depth of leadership in your next generation team
- Create development plans for the next generation of leaders
- Develop succession plans for key roles
- Recruit new people to fill gaps in the organization

However, you choose to move forward, STM is here to help you solve your people challenges so that you can concentrate on doing what you do best: lead, promote and grow your business.

Thank you for your faith in our work. we look forward to working with you and your team.

Best wishes and *get on with it!*



Sue MacArthur / President