

# BrandSmith

## CULTURE & MANAGEMENT STUDY

August 2024

**Presented to:** Evelyn Smith, President

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## INTRODUCTION

This report describes the BrandSmith culture and your individual communication and management styles based on the three of you as key leaders of the agency. The immediate purpose of this information is to assist in a successful transfer of ownership from you to Jessica and Mary. In addition, it will provide valuable insight to guide the successful selection and onboarding of important new hires.

The first two sections of this report (KEY ASSESSMENT TERMS and HOW THE ASSESSMENTS ARE RELATED) describe the assessments and should help you better understand the culture summary and individual summaries at the end. Note that the team assessment review is presented in this order:

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

The third section, CULTURE & MANAGEMENT SUMMARY, describes the company culture, communication and management styles based the assessments of the three people you identified as the key leaders of the organization – you, Jessica, and Mary. We summarize your culture as being *highly learning oriented* and under Mary and Jessica more bottom-line oriented. Your tagline might become *turning learning into dollars*, though you are still oriented to doing things *in a principled and ethical manner*. Communication is *direct but approachable*, with a *people centric* leadership style slightly more focused on *systems and planning*.

The final and longest section, INDIVIDUAL ASSESSMENTS, are summaries of each person's results, their strengths, potential, and areas suggested for development. The most useful part of this report for you may be the SUMMARY & RECOMMENDATIONS section at the end of each individual write-up.

## KEY ASSESSMENT TERMS

**BEHAVIOR** indicates how people are perceived by others and 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 Myers-Briggs alone cannot reliably 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 a particular team.

### **D – Dominance: Extroverted, Task-Oriented**

Self-confident, assertive (even aggressive), risk-taking, results focused, competitive  
*17% of the U.S. population*

### **I – Influence: Extroverted, People-Oriented**

Charming, enthusiastic, social, optimistic, talkative, approachable, friendly  
*38% of the U.S. population*

### **S – Steadiness: Introverted, People-Oriented**

Patient, team player, good listener, reserved, focused on quality relationships  
*32% of the U.S. population*

### **C – Compliance: Introverted, Task-Oriented**

Precise, analytical, perfectionist, serious, quiet, focused on quality outcomes  
*13% of the U.S. population*

**MOTIVATORS are a key indicator of why people do what they do.** They are useful in predicting success in a role or within a particular group. This assessment tells us what spurs one to action, and so provides insight into the type of culture, industry, or role in which one may be suited to work. They also 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 into leadership or work style, capacity, attitudes, and energy and drive for performance.** They are based on a psychological instrument that reveals beliefs, attitudes, and emotional biases to definitively answer the question, *will one perform?* Competency 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 gas 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

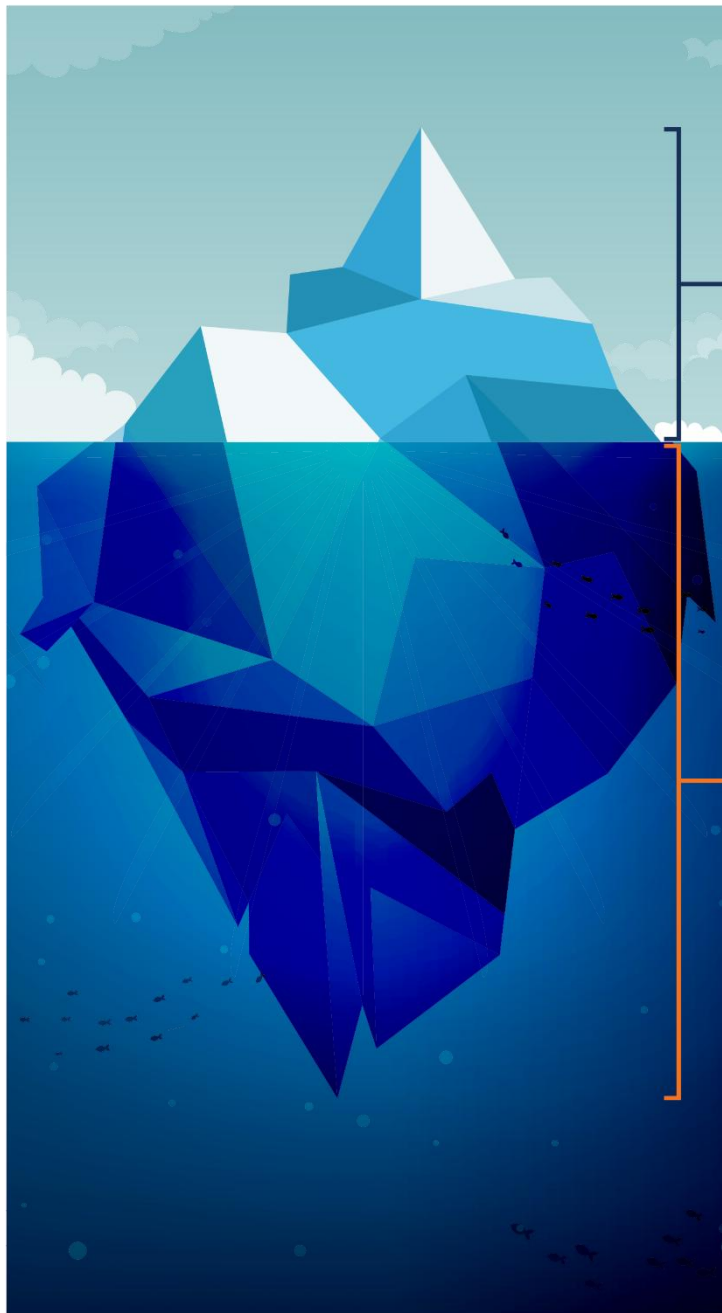
**World View: Systems** – strategy planning and goal oriented; and emotional bias concerning the benefits and problems with systems and rules

**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**

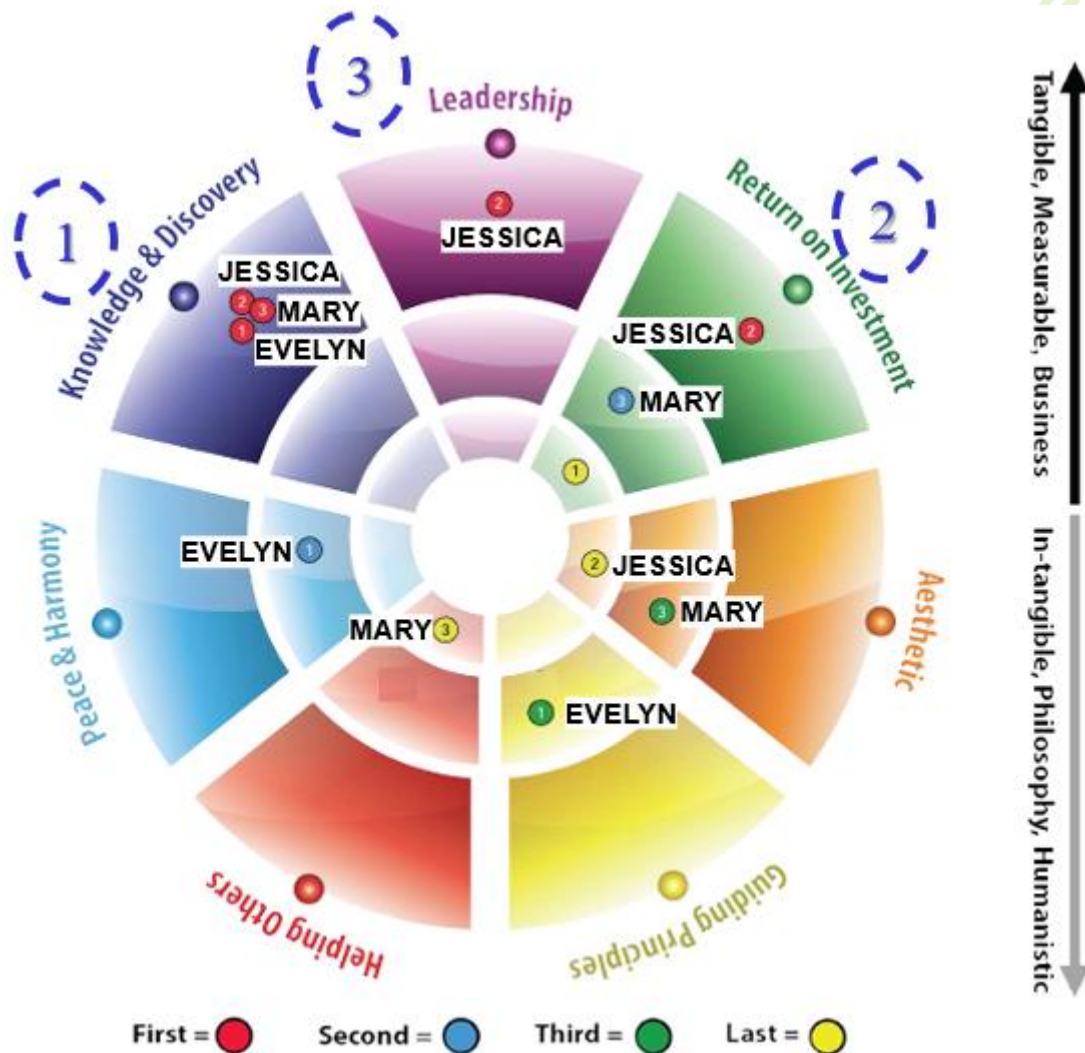
#### *Predict performance (Common Business Success Factors)*

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. As the owner, you are essentially the company's culture. Like you, Jessica and Mary are powerfully motivated by learning, and that is clearly a top priority at BrandSmith.



It is important for team members to have similar motivators to ensure that everyone is moving the company in the same direction, but different enough that there are no blind spots. Jessica and Mary are both focused on the bottom line, but where they differ and complement each other is that Jessica is also driven by being in charge and taking the lead to make sure things get done, whereas Mary is the creative visionary. Mary is not

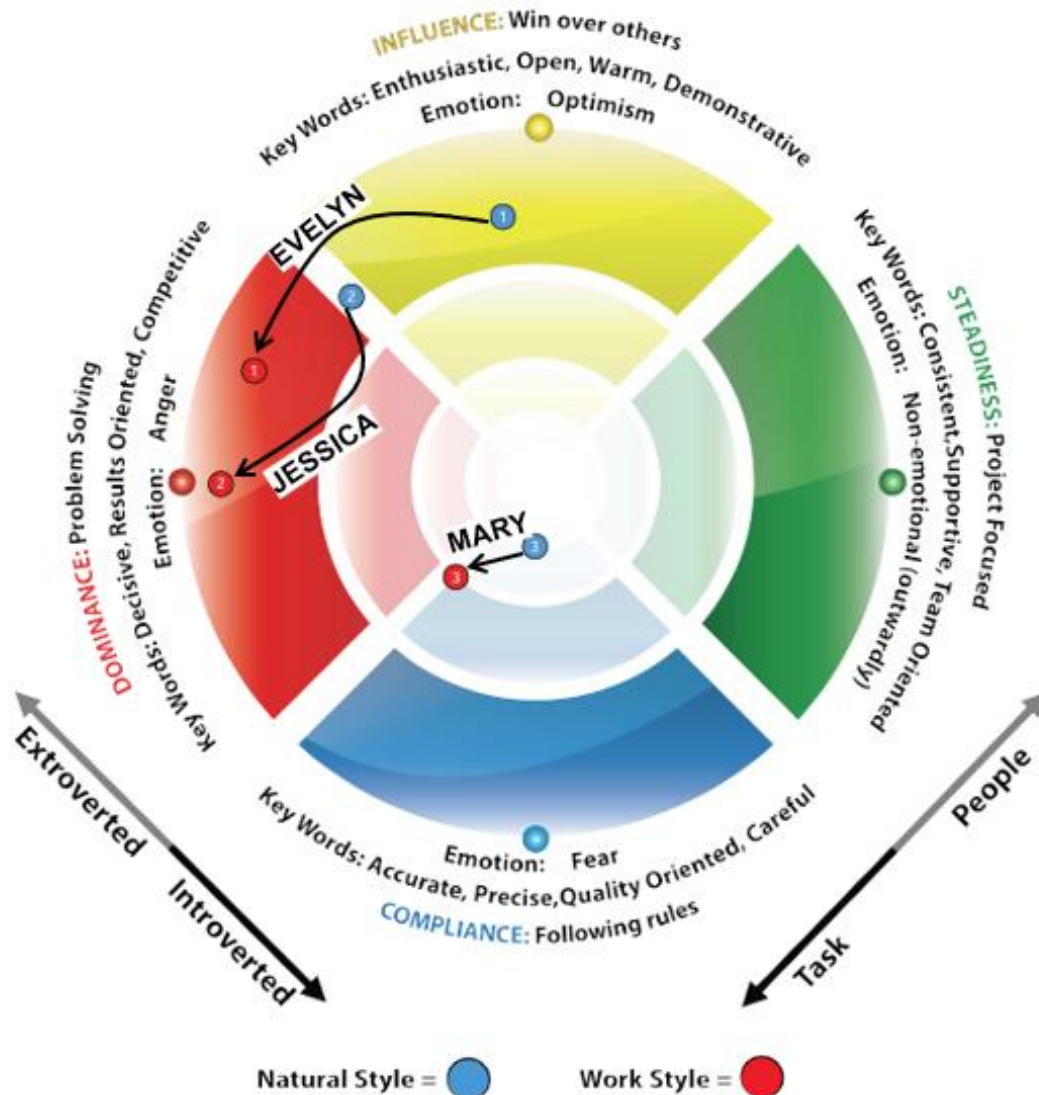


driven to be in charge, and Jessica is not driven to be creative, but both are important for successful leadership of the agency, so they complement one another very nicely.



## 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.

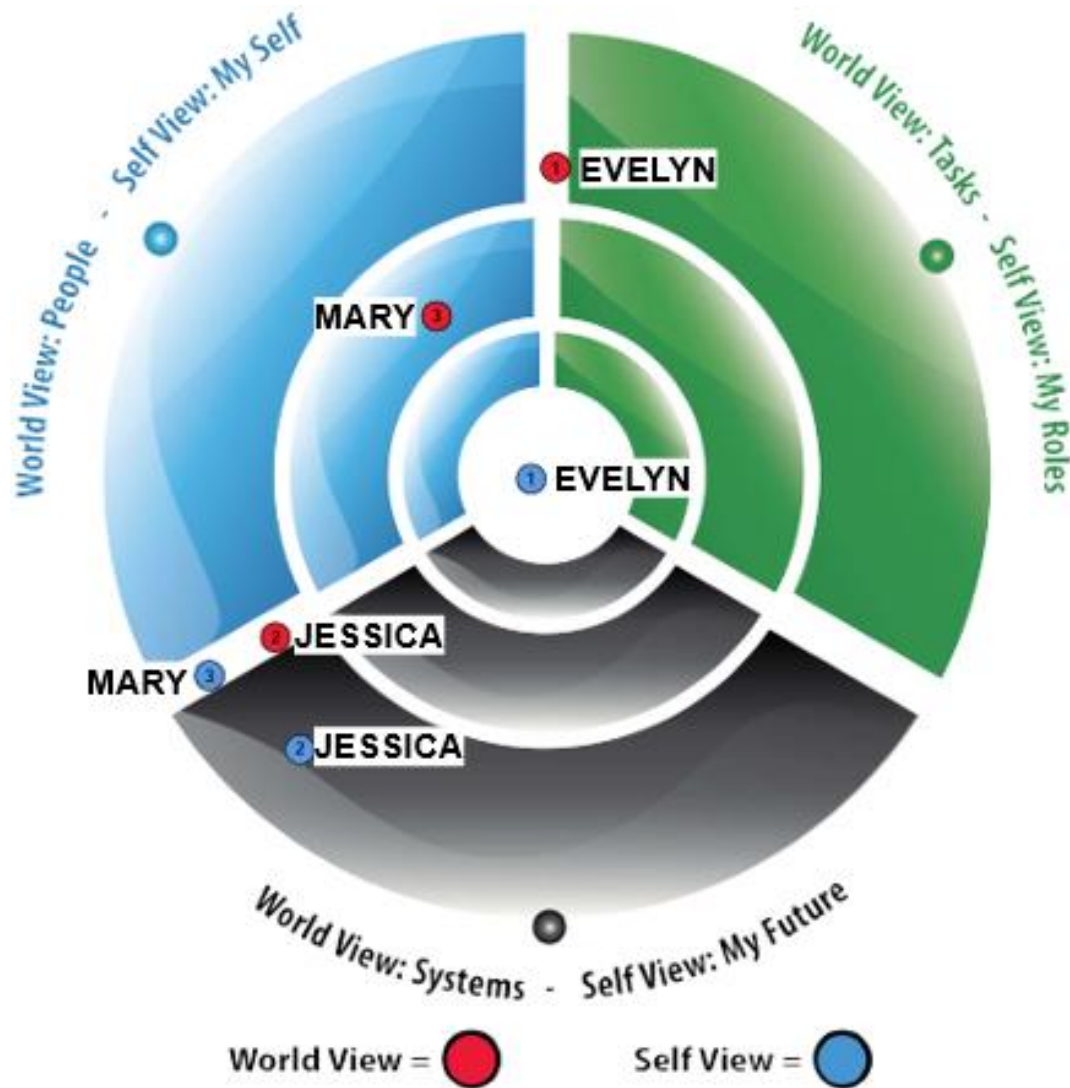


Behaviors tell us *how* one is perceived by others and their approach to communication and problem solving. Note there is a Natural Style (blue dots, the 'real' you) and an adaptation at Work Style (red dots). The closer the dot to the outer edge, the stronger and purer that style, the closer to the center means greater flexibility.

All three of you have a natural orientation toward people and being friendly and outgoing, you in particular. Jessica tends to be equally task focused with a sense of urgency to get things done, and Mary has a quieter, more quality conscious side to her. All three of you adapt to a more assertive no-nonsense work style, particularly Jessica who becomes entirely focused on getting things done and the bottom line which is likely why she comes off as impatient or critical to members of her team. You maintain your friendly demeanor but shift to being more focused on results than you are on relationships. Mary adapts to this more dominant style as well, but to a more moderate extent, likely because she knows she has to do so in order to be heard. You are all very communicative, which is important for any leader.

## Competencies

This chart shows the group's Leadership Competencies as indicated by the **red dots**. The **blue dots** concern Energy & Drive, which is more personal and dealt with primarily in the individual summaries that follow this section.



As leaders you all have different styles, though what you have in common is a clear understanding of people, relationships, communication and listening. You, Evelyn, are focused on developing the next generation of leaders, Jessica on planning and delegating tasks to the right people, and Mary on building relationships and inspiring both her team and your clients. Jessica and Mary lack some practical tools and understanding of leadership which is causing them to be disengaged with, and to a certain extent dissatisfied, with their roles and both indicate that they feel overworked and are struggling

to maintain their workload. They lack clarity and optimism about the future as well. This may be caused by a certain level of fear about taking over the agency.

You likely will have more specific questions about leadership and succession issues once you read this report and the individual write-ups that follow. We can discuss those in a review meeting, and that will help me better understand BrandSmith and answer your questions to the full extent possible.

## INDIVIDUAL ASSESSMENTS

EVELYN SMITH, President

### ASSESSMENT HIGHLIGHTS:

Behaviors	Natural	Work	Change
Dominance	4.6	7.3	2.7 Up
Influence	6.8	6.5	0.3 Down
Steadiness	4.0	3.2	0.8 Down
Compliance	4.6	3.0	1.6 Down

Your **NATURAL BEHAVIOR** is very friendly and outgoing. You are confident and relaxed with others and you love people interaction. You are optimistic and tend to build rapport easily.

Your **WORK BEHAVIOR** maintains the outgoing and friendly manner that we see in your natural style, but you also develop a strong task focus and high sense of urgency to get things done. This adaptation makes sense given your role as the owner of the company. You are decisive and a quick problem solver, you're direct and to the point but you tend to do so in a friendly manner. This adaptation is likely what's driving the comments in your review document about slowing down to listen, which can be a difficult thing to do when you're just so focused on making decisions and getting things done.

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

#### TOP 4 MOTIVATORS

1. Knowledge and Discovery 7.9
2. Peace and Harmony 5.8
3. Guiding Principles 5.7
4. Helping Others 4.8

Your primary **MOTIVATORS** are based in knowing what's what and using your knowledge to do the right thing and serve others. You love to learn and value having peace and balance in your life. You appreciate when things are running smoothly and

without drama. In addition, you are guided by strong principles that reinforce the importance of learning and reducing conflict.

VIEW	People (I)				Tasks (E)				Systems (S)			
World:	8.8	H	S	OF	8.6	H	OF	S	7.6	H	UF	UF
Self:	8.5	H	S	S	8.3	H	OF	OF	8.2	H	UF	UF

Your **LEADERSHIP STYLE** is *developing people*. This is a very strong leadership style which is all about preparing your next generation of leaders. You put an equally strong emphasis on interpersonal relationships and practical results and execution, guiding your employees toward a high level of achievement and personal satisfaction in their work. You are a creative problem solver but more flexible when it comes to systems and structure. You will adjust the plan or bend the rules if it is better for the people involved and/or will help you achieve the desired results. You have a solid team in Jessica and Mary which allows you to concentrate on development without having to do a lot of handholding.

Your strong **ENERGY & DRIVE** for performance comes from being equally satisfied with who you are and what you have accomplished as a leader. You know who you are as a leader and are objective about your strengths and weaknesses, engaged with your role as the leader of the agency, and you know what is next for you professionally, though you are a bit unclear and even pessimistic about how that will materialize. This is not uncommon for someone who is planning a succession – letting go of something that has been such a significant part of your professional life is a huge step.

### SUMMARY & RECOMMENDATIONS:

You are handing over the reins of day-to-day leadership of the company in just a few months and are in a reasonably good position to be doing so. The most important thing you can do right now is engage Jessica and Mary in leadership coaching to better equip them for their future at BrandSmith. Focus your efforts along these lines to boost their understanding of their leadership roles and find ways to ease their burdens of feeling overworked and overwhelmed.

## JESSICA JONES, Vice President of Client Experience

### ASSESSMENT HIGHLIGHTS:

Behaviors	Natural	Work	Change
<b>Dominance</b>	<b>6.8</b>	<b>8.5</b>	<b>1.7 Up</b>
<b>Influence</b>	<b>6.5</b>	<b>5.0</b>	<b>1.5 Down</b>
<b>Steadiness</b>	<b>3.1</b>	<b>1.9</b>	<b>1.2 Down</b>
<b>Compliance</b>	<b>3.6</b>	<b>4.6</b>	<b>1.0 Up</b>

Jessica's **NATURAL BEHAVIOR** is decisive and she does not like to follow rules set by others with which she disagrees. She wants to be her own person and do things in her own way. She is optimistic, has a high sense of urgency to get things done, and will speak her mind in a direct but friendly manner. She is confident and relaxed with others in just about any situation.

Her **WORK BEHAVIOR** is entirely focused on results and getting things done. She means business! This style can be intimidating, particularly for new employees (you noted many on her team have been with you for 18 months or less), or introverted and less communicative people. This explains why she can be perceived as intimidating, condescending, and critical. She has no patience to repeat herself once, never mind four times per your notes!

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

#### TOP 4 MOTIVATORS

1. **Return on Investment 7**
2. **Knowledge and Discovery 7**
3. **Leadership 7**
4. **Helping Others 4.2**

Jessica's primary **MOTIVATORS** are very business oriented - ROI, learning, and leadership are all equally strong. This reinforces her behavioral shift to become very task focused with a high sense of urgency. Notably, Jessica is the only one out of the three of you who is purely business oriented. She has a strong capacity to be the Integrator of the agency and the one who makes sure things done.



VIEW	People (I)				Tasks (E)				Systems (S)			
World:	8.8	H	S	OF	7.8	H	UF	UF	8.5	H	OF	S
Self:	6.4	M	S	OF	5.6	M	S	OF	7.8	H	UF	UF

Jessica's **LEADERSHIP STYLE** is *delegation*. She understands people well and is good at seeing the big picture and how others fit into it, which her to select the right people for any given task. She is very structured and strongly values having a plan to follow, which is different from you and Mary. She is also good at making her expectations clear to others, though she lacks the focus on the individual and patience to assure her communication has been received. It is easy for her to see the direction things need to go but she lacks some practical leadership tools required to guide her team to get there and complete the task in a practical manner. This probably causes Jessica a lot of stress and could be playing a role in her disengagement as a leader which I discuss below.

Jessica's low **ENERGY & DRIVE** for performance is a result of being very disengaged from her role and uncertain and pessimistic about her future direction. She self-reports that she is unhappy with her work life balance and other statements regarding her workload being too much. It is also very likely that her lack of a full understanding of her leadership role is making her job more difficult and contributing to her lack of clarity and optimism about her future.

### SUMMARY & RECOMMENDATIONS:

Jessica is very business oriented and is well positioned to play the *Integrator* role as one of the new owners of BrandSmith. She is all about making sure things get done to the plan, which will complement Mary's creative and more *visionary* style. However, in order for this to be a success, Jessica needs coaching on how to be a more effective leader. There is no doubt that she is a great employee, which is why you trust her to take over the company, but her lack of understanding of leadership tools and techniques fuels her disengagement and frustration. With effective coaching, Jessica could become the balanced leader/integrator she needs to be, which will take her energy and drive for performance to higher levels. You need both Jessica and Mary to be "more naturally relationship based than they are". This can be an explicit focus of coaching but improving Jessica's leadership toolkit will allow her natural relationship capacity to shine brighter.

## MARY JACKSON, Vice President of Sales & Marketing

### ASSESSMENT HIGHLIGHTS:

Behaviors	Natural	Work	Change
Dominance	4.4	6.4	2.0 Up
Influence	6.8	5.4	1.4 Down
Steadiness	2.4	2.9	0.5 Up
Compliance	6.5	5.4	1.1 Down

Mary's **NATURAL BEHAVIOR** is on the one hand extroverted, friendly, and highly focused on people. On the other hand, she can be quiet, task-oriented, and focused on doing things with precision and quality. This drives internal stress, which manifests itself in what you and the team perceive as a failure to communicate effectively when handing off projects.

Her **WORK BEHAVIOR** is similar to you and Jessica in that she increases her focus on getting things done. She is very optimistic and wants to get things done quickly (hence the quick pass-off), though not at the expense of quality. Mary is capable of making decisions within a climate of uncertainty but may hesitate to act under heavy pressure. She is confident and relaxed with others.

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

#### TOP 4 MOTIVATORS

1. Knowledge and Discovery 8.9
2. Return on Investment 5.6
3. Aesthetics 5.5
4. Guiding Principles 4

Mary's primary **MOTIVATORS** are a mix of business and creativity. She is passionate about learning and that is more important than anything else. She is often bogged down by analysis paralysis which can inhibit her ability to make firm decisions. This also contributes to the team's perception that she does not hand off projects well. However, she is creative and is well suited to be the agency's visionary.

VIEW	People (I)				Tasks (E)				Systems (S)			
World:	9.3	H	OF	OF	7.8	H	UF	UF	7.9	H	S	UF
Self:	7.8	H	UF	S	6.7	M	OF	OF	7.8	H	S	S

Mary's **LEADERSHIP STYLE** is *communicating*. Her primary focus is on people and relationships. She has excellent listening and communication skills - explaining necessary changes, checking for understanding, and seeking agreement and commitment from everyone involved. Like Jessica, Mary lacks understanding of the practical side of leadership, above and beyond just facilitating teamwork. She does not make her expectations clear, which is fine if her team is seasoned and self-sufficient, but a young team needs more prescriptive direction and even hand-holding. The theme of her not passing off projects effectively shows up in all three assessments and needs to be addressed through coaching.

Mary's lower ENERGY & DRIVE for performance also stems from her disengagement and lack of understanding of leadership tools. She is generally confident in herself as a leader, though she can identify areas for improvement and is open to coaching to improve. She is not clear about her future direction, as a leader but is open to the possibilities.

### SUMMARY & RECOMMENDATIONS:

Mary is more of a *visionary* type which will complement the new partnership nicely with Jessica as the *integrator*. However, Mary is also in need of working to better understand the tools and techniques of leadership. Providing coaching and solid leadership tools will allow her to develop clarity about her role and engage more fully as a leader. As with Jessica, you need Mary to be "more naturally relationship based than they are". This can be an explicit focus of coaching, but Mary is naturally empathetic, and people oriented. Effective coaching can help expose more of those qualities, right now they are buried beneath frustration at not being able to lead as effectively as she would like.

## NEXT STEPS

We provide this information to be immediately applicable in making key decisions and managing the relationships and development of your team in order to facilitate your successful exit from the agency. 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 full assessment reports 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 coach Jessica and Mary toward a better understanding of their role as leaders.
- Having this information will allow us to more accurately develop benchmarks for recruiting new members to the team and ensure that your new hires are right not only for their particular roles, but also for your culture.

## 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.** This is not a one-off project. Our goal is to partner with you on your strategic initiatives for the long term. If you encounter issues down the line, remember the value of the information in this report and leverage the investment you've already made. We are here with you every step of the way to help solve your people challenges so that you can concentrate on doing what you do best: lead, promote, and grow your business.

There are various ways to use this information:

- Establish benchmarks for future hiring to ensure fit to the position and your culture.
- Determine who on your team is open to and will benefit from coaching *in specific areas* to improve performance and/or leadership capacity.
- Evaluate the depth of your next generation of leadership and create targeted development plans.
- Develop succession plans for key roles.
- Recruit new people to fill gaps in the organization.
- Reassign people to roles to which they are better suited.
- Make adjustments to the way you manage your people.

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.

Are you ready to **get on with it?**

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