HUNTING DOWN HIGH POTENTIAL TALENT + FUTURE LEADERS

IBA ANNUAL CONVENTION
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What? So What? Now What?

What will I share with you today?
- “Potential” maybe hiding in plain sight.
- Talent optimization takes discipline – 4-part framework.

So what? Why should you care?
- Talent challenges are THE most pressing issues facing organizations today.

Now what?
- My hope is that you’ll take these ideas and tools and advance the leadership conversation at your company.
SURFACING LEADERSHIP POTENTIAL IN YOUR ORGANIZATION IS A DISCIPLINED PROCESS.
Context is the key – from that comes the understanding of everything.

- Kenneth Noland
Same red center and concentric circles.

How is the context different?
UNDERSTANDING ORGANIZATIONAL CONTEXT MUST HAPPEN BEFORE YOU CAN DEFINE AND IDENTIFY HIGH POTENTIAL TALENT.
DIAGNOSE: ACTIONS YOU CAN TAKE

• **Measure what matters.** Multiple types of people data are required to understand the employee experience so that you can effectively identify future leaders. Take stock of what types of data you currently collect.
  - Behavioral profiles
  - Cognitive abilities
  - Employee engagement
  - Job performance
  - Organizational and team culture
  - Employee sentiment

• **Decide what measurement tools you need to gather the data that matters.**

• **Remember, context matters.**
  - Future leaders are far easier to find when you have clarity about the challenges facing the organization.
Form Follows Function.

- Louis Sullivan
father of the modern skyscraper
What can we learn from Fallingwater about organization design?
Classes of Strategy

Cultivating
- Focus on employee commitment, morale, and development
- Inwardly-focused innovation, towards employee cohesion
- **Success = high engagement and comfortably positive climate**

Stabilizing
- Focus on improving efficiency and predictability
- Entrepreneurial goals pursued aggressively but selectively
- **Success = coaxing higher performance out of existing offerings to ensure customer loyalty**

Exploring
- Focus on pursuing new opportunities and investigating innovations
- Nimble, flexible, broad rather than focused, willing to experiment
- **Success = product and services that are unique to the market**

Producing
- Focus on accumulating clients and build reputation in the field
- Competitive tactics, focus on price, quality and delivery to outmaneuver competition
- **Success = high market penetration and market share**
Illuminate Leader Agreement

Clear YES

Team Split

Clear NO
Identify Gaps In Leadership Style

- Leaders are supportive, transparent, and empathetic.
- Leaders are well-organized, coordinated, and efficient.
- Leaders are visionary, innovative, and risk-oriented.
- Leaders are driving, competitive, and demanding.
Does culture align with strategy?

- The company values people who work together and demonstrate loyalty
- The company values people who are consistent and follow the rules
- The company values people who create unique or original products or services.
- The company values people who are competitive and win.

“CULTURE EATS STRATEGY FOR BREAKFAST.”
- Peter Drucker
Design: Actions You Can Take

Review your organization’s strategic plan.

• How would you classify your strategy?
  • Cultivating: Success = high engagement and positive work climate
  • Stabilizing: Success = higher performance out of existing offerings and client loyalty
  • Exploring: Success = products and services that are unique to the market
  • Producing: Success = high market penetration and high market share
Design: Actions You Can Take

Review your org chart.

• Are there any roles missing that are important to executing your strategy?
• Any redundancies?
• Any new work-flows that impact org structure?
DESIGN: ACTIONS YOU CAN TAKE

Review your core values.

- Values are the pillars of organizational culture.
- Are these widely understood and embraced?
- Are leaders personifying and coaching to the core values?
No management style can undo the damage of a poor hiring (or promotion) decision.

- Red Scott
Former Vice Chairman of Pier One Imports and grand nephew of General George S. Patton
Leadership fit is multi-faceted.

When promoting leaders from within, we must apply the same level of rigor as we do when we hire from the outside.
# Leader Profile

## Will Like Hearing
- Lead the conversation
- Explore new frontiers
- Freedom to take ownership
- Manage your own priorities

## NOTEWORTHY BEHAVIORS

<table>
<thead>
<tr>
<th>Quick to connect</th>
<th>Careful with rules</th>
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<tbody>
<tr>
<td>Fluent</td>
<td>Conscientious</td>
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<tr>
<td>Fast-talking</td>
<td>Thorough</td>
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<tr>
<td>Lively</td>
<td>Precise</td>
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<tr>
<td>Enthusiastic</td>
<td>Concerned with rules and accuracy</td>
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</table>
**Cassidy is a Collaborator.**
A Collaborator is a friendly, understanding, willing and patient team player.

**Strengths:**
- Warm, friendly, lively, extraverted, easygoing
- Willing team player and member; helpful, understanding, accepting, good listener
- Patient, steady, negative response to pressure

**Caution Areas:**
- Can have difficulty making unpopular decisions
- May not have great follow through with details
- Sometimes appear to others as being too casual

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**BEHAVIORAL INTERVIEW QUESTIONS**

Area(s) of potential behavioral misalignment with job target. Use these questions to EXPLORE if the candidate can behaviorally adapt to the job.

Tell me about a time when you were required to lead a team or a project.

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Describe a situation when you had to initiate something new.
HIRE/PROMOTE: ACTIONS YOU CAN TAKE

• Create Leadership Profiles.
  • Solicit key stakeholder input to ensure everyone sees the purpose and value of the leadership role the same way.

• Create key performance indicators.
  • Given leader’s responsibilities, how will success in the role be measured differently at each level?

• Treat your Leadership Profiles like critical pieces of marketing.
  • Speak to the head, the heart and the briefcase.

• Use a structured interview process and assess fit according to the head, the heart and the briefcase.

• Remember, you want to hire/promote the person who can best DO the job, not the person who can best GET the job.
  • You must discern the true work requirements at each leadership level in order to make the right choices.
Jobs are out.
Journeys are in.

- World Strides recruiting poster
DISCUSS: How has your personal potential changed over time?

Potential is not fixed.
Confidence and productivity increase when people’s inherent motivating needs are met.

Needs
- Control
- Harmony
- Recognition
- Solitude
- Familiarity
- Variety
- Clarity
- Freedom

Behaviors
- Independent
- Accommodating
- Persuasive
- Analytical
- Patient
- Intense
- Detail-oriented
- Flexible
How to Interact with

**NORA ELDER**

- Let me collaborate
- Let me think it through
- Give me variety
- Give me flexibility

DOMINANCE
EXTRAVERSION
PATIENCE
FORMALITY

- Let me drive
- Let me talk it out
- Give me stability
- Give me structure

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Learn more about The Predictive Index at www.predictiveindex.com.
NORA ELDER

This Personal Development Chart provides you with actionable insights based on your behavioral drives as measured by The Predictive Index. The Chart includes a description of your natural Strengths and respective Caution areas to consider. The Self-Coaching Tips provided can help you balance your most naturally occurring behavioral style in a variety of situations.

DOMINANCE (A) - The need to control

<table>
<thead>
<tr>
<th>MODERATELY</th>
<th>MODERATELY</th>
<th>VERY</th>
<th>EXTREMELY</th>
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</table>

**STRENGTHS**
- Understanding and collaborative
- Accepting of others’ decisions
- Supportive management style
- Interested in team welfare and development

**CAUTIONS**
- May shy away from tough conversations
- May have difficulty making unpopular decisions
- May be seen as too cautious or not strategic enough

**SELFCOACHING TIPS**
- Shift your mindset from "I want to go along" to "I want to be fair"
- Stand your ground when you know you're correct
- Come to situations and meetings prepared to contribute

**STRENGTHS**
- Drives change and challenges status quo
- Seeks to lead and have an impact
- Innovative, self-motivated
- Able to think "big picture"

**CAUTIONS**
- May be seen as overly aggressive
- May intimidate rather than motivate
- May have difficulty delegating authority
- May appear to be tough-minded and directive

**SELFCOACHING TIPS**
- Actively seek input from multiple sources
- Practice active listening and allow people to express their opinions or ideas
- Think before you speak; think of how your message will be received
**EXTRAVERSION (B) - The need for social interaction**

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<tr>
<th>EXTREMELY</th>
<th>VERY</th>
<th>MODERATELY</th>
<th>MODERATELY</th>
<th>VERY</th>
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<tbody>
<tr>
<td><strong>STRENGTHS</strong></td>
<td><strong>CAUTIONS</strong></td>
<td><strong>STRENGTHS</strong></td>
<td><strong>CAUTIONS</strong></td>
<td><strong>SELF-COACHING TIPS</strong></td>
<td><strong>SELF-COACHING TIPS</strong></td>
</tr>
<tr>
<td>Creative, problem solver</td>
<td>May be slow to trust and reluctant to share until comfortable</td>
<td>Motivating, stimulating communicator</td>
<td>May be too optimistic or overly trusting</td>
<td>Give presentations in your area of expertise</td>
<td>Allow others the opportunity to contribute and influence outcomes</td>
</tr>
<tr>
<td>Data driven, analytical</td>
<td>Communication may be pointed or minimalist</td>
<td>People-oriented, sociable</td>
<td>May prioritize being liked or being the focus of attention</td>
<td>Initiate conversations or schedule time to speak with others</td>
<td>Consider how much detail or tangible information is needed when communicating</td>
</tr>
<tr>
<td>Thoughtful approach to communicating information</td>
<td>May appear overly task-focused or remote</td>
<td>Builds team cohesion and collaboration</td>
<td>May appear overly talkative and superficial</td>
<td>Anticipates problems</td>
<td>Ask about potential problems or risks</td>
</tr>
<tr>
<td>Reflective and introspective</td>
<td></td>
<td>Thoughtful delegator</td>
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</table>

**SELF-COACHING TIPS**
- Allow others the opportunity to contribute and influence outcomes
- Consider how much detail or tangible information is needed when communicating
- Ask about potential problems or risks
# PATIENCE (C) - The need for stability

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>CAUTIONS</th>
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</thead>
<tbody>
<tr>
<td>- Proactive and results-oriented</td>
<td>- May appear to be terse; “cut to the chase”</td>
</tr>
<tr>
<td>- Able to deal with time pressure</td>
<td>- May tend to be intolerant of delays especially when impacting results</td>
</tr>
<tr>
<td>- Able to deal with variety and change</td>
<td>- May become frustrated in stagnant environments</td>
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<tr>
<td>- Multitasker, able to juggle priorities</td>
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</table>

<table>
<thead>
<tr>
<th>SELF-COACHING TIPS</th>
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</tr>
</thead>
<tbody>
<tr>
<td>- Reflect on situational urgency - does everything need to be done right now?</td>
<td>- Clarify timelines and focus on “when”</td>
</tr>
<tr>
<td>- Recognize that people have different paces and manage expectations</td>
<td>- Manage time wisely - start early and leave time for the unexpected</td>
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<tr>
<td>- Honor priorities and see initiatives through to completion</td>
<td>- Keep others informed when progress is made</td>
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<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>CAUTIONS</th>
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<tbody>
<tr>
<td>- Calm and stable</td>
<td>- May appear uncomfortable with change</td>
</tr>
<tr>
<td>- Thoughtful listener</td>
<td>- May appear to over-analyze situations or be too cautious</td>
</tr>
<tr>
<td>- Builds solid group processes</td>
<td>- May have difficulty under time pressure</td>
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<tr>
<td>- Gives people time to process</td>
<td>- May be too comfortable with the familiar and slow to adopt new ideas</td>
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<tr>
<td>FORMALITY (D) - The need to conform</td>
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<td>-----------------------------------</td>
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<tr>
<td><strong>STRENGTHS</strong></td>
<td><strong>CAUTIONS</strong></td>
</tr>
<tr>
<td>EXTREMELY</td>
<td>VERY</td>
</tr>
<tr>
<td>Flexible approach to most situations and people</td>
<td>May provide limited follow up or attention to detail</td>
</tr>
<tr>
<td>Able to delegate details easily</td>
<td>May not adhere to structure or direction</td>
</tr>
<tr>
<td>Adept at changing organizational needs</td>
<td>May appear to others as too casual or uninhibited</td>
</tr>
<tr>
<td>Deals well with ambiguity</td>
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<tr>
<td><strong>SELF-COACHING TIPS</strong></td>
<td></td>
</tr>
<tr>
<td>Seek data to support your decisions</td>
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<tr>
<td>Evaluate decisions from multiple perspectives or partner with someone who can provide a balanced view</td>
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<tr>
<td>Respect questions others have about “how” things will be done</td>
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</tr>
<tr>
<td><strong>STRENGTHS</strong></td>
<td><strong>CAUTIONS</strong></td>
</tr>
<tr>
<td>MODERATELY</td>
<td>VERY</td>
</tr>
<tr>
<td>Strong discipline and execution</td>
<td>May be uncomfortable in ambiguous situations</td>
</tr>
<tr>
<td>Builds structure and respect for the plan</td>
<td>May struggle with situations that call for flexibility</td>
</tr>
<tr>
<td>Focuses team on how to get things done right</td>
<td>May be seen as a perfectionist</td>
</tr>
<tr>
<td>Organized and thorough follow-up</td>
<td></td>
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<tr>
<td><strong>SELF-COACHING TIPS</strong></td>
<td></td>
</tr>
<tr>
<td>Learn how to move forward when “enough” information is available</td>
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<tr>
<td>Ask yourself: Is it worth this much time?</td>
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</tr>
<tr>
<td>Recognize and respect flexibility shown by others</td>
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</table>
INSPIRE: ACTIONS YOU CAN TAKE

• Identify new leadership roles needed as your organization grows.
  • Solicit key stakeholder input to ensure everyone sees the future in a similar way

• Identify career paths within each functional area and across functional areas.
  • Ensure that every leader can answer this question from an employee: “If I am successful in my current role, where can I go next?”

• Invest in leadership development.
  • Most managers and leaders are tragically under-skilled when it comes to coaching, giving feedback, building trust and displaying empathy.

• **Remember**, people want journeys, not jobs.
  • High potentials need self-awareness of their own strengths and coaching to progress into future leaders.
Talent Optimization Is A 4-part Discipline
What? So What? Now What?

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Email me at hhaas@advisausa.com for a free Ultimate Guide to Talent Optimization.
THANK YOU!