



Executive Development Review

Joe Smith
Title
Company

July 2018

Confidentiality

This review is considered confidential, providing a perspective on the candidate related to his capability and potential for the role in question and future opportunities. This information should be considered in combination with other information on the individual to provide a full view of them as a contributor and a leader for the organization and for succession.

This report should be maintained in a secure file. Access should be available only to the individual in question and those who have direct involvement in the career management of the individual. Distribution beyond this should be at the expressed request of the individual. Use of this information should only be upon receipt of guidance on its interpretation. Requests for guidance can be made to info@organizationdynamic.com.

Information shared in this review is considered valid until July 2020.

Mary Marcus, MBA PhD
Principal Consultant
July 2018

Overview of Process

The assessment summary below has been conducted with Sally related to the role of Director of Operations. The details provided is the result of three assessments: Caliper Profile online psychometric assessment, Facet 5 online personality assessment, Firo B for Business. This is supplemented with a 4 hour biographical and explorative interview. The information provided should be combined with other available information on the individual, including personal interaction, references, etc. to derive a full perspective.

Executive Summary

Joe Smith is a high energy, enthusiastic, and passionate leader. He is fiercely loyal to the company. He is well-rounded, balancing the operational and the strategic aspects of his role with the people side. He is self-directed and resourceful, he prefers receiving clear direction and then being given the latitude to act. Contrasting this is a rule-following aspect to his style. In consequence, despite his curiosity and desire to explore new ways of doing things, he constrains himself by the parameters that have been set for him, or the mandate of the moment.

Joe enters any new challenge with confidence that he can figure out the path to success. He does the right thing from a leadership perspective almost intuitively. His career to date has been built on a combination of disciplined execution and luck, typically with his focus being the immediate mission at hand. He consequently tends to take his broad and multifaceted experiences as discrete events rather than additive critical experiences to shape his leadership, and he has yet to experience a shaping failure that would provide him added wisdom and maturity. He now has the opportunity to shape his personal leadership brand and take a more considered approach to his development as a senior leader which will also help to ground his executive presence.

Potential and Recommendations

Joe's instinctive leadership style, his problem solving ability, and high learning orientation point to a substantial potential to grow as an executive. He will benefit from the support of a mentorship type relationship from whom he can learn. Working with a coach will also ensure that Joe takes his experiences and packages them into a more fulsome definition of his leadership brand and will help him take full ownership of his strategic leadership role.

Participation in case-based, topical leadership programs where he is exposed to peers from other industries would benefit his overall formal leadership development. The proviso is that these sessions be timely and immediately applicable in his work context. Most immediate he should consider focusing on strategy and building team and teamwork.

Detailed Profile

Joe's **intellect** is anchored in energy and action orientation. He is self-confident and ready to take on any new endeavor. He thinks quickly and accurately, at his best when he has multiple things on the go and is tackling worthy challenges. His reasoning was measured in the high to very high range, balancing very high tactical and critical reasoning with high strategic reasoning. When provided with a clear brief, he jumps to action with self-assuredness, ready to experiment in search of the best answer. He relishes discussion and debate on problems and solutions, both within and outside of his mandate. These keep him thinking and learning. Despite a lower affinity to detail, his decisions are based on some analysis, and his logic will be sound. Once he has set the path, he is diligent and methodical in execution. While he will not delay execution, he likes to have some degree of a plan, applying his reflective style to consider the consequences of actions at a broader but more immediate level. With this approach, he attends comfortably to both the operational and people aspects of the work, and thus effectively to managing change. He does, however, have the potential to think his answer is right and may be difficult to sway once he has landed on a course of action.

Motivationally, Joe is ambitious and passionate. He embraces everything with an optimism and enthusiasm that is infectious. This is paired with a self-confidence that is equally engaging. He is independent in style and prefers to be in control of his work. He wants precise delegation, and then within that, freedom to act. His ambition is bridled by his loyalty. Consequently, despite his adventuresome energy and openness to change and experimentation he will stay inside the lines of the mandate he is assigned. His motivation comes from not wanting to let anyone who matters to him down. While he doesn't seek overt reward for his contribution, it is important for him to be respected for his abilities and to be treated fairly. With his high energy, when engrossed in a project, he puts his all into it, making him potentially blind to new developments to which he should pay attention. Ambiguity is not his comfort zone and his frustration piques when the path to what is right is tested. It is important to him to have a clear grip on the context he is dealing with and a perspective he can lead from. While he enjoys being a sounding board for others, and will debate things he is working on, he is less likely to reach out actively for help when he is struggling.

Interpersonally, loyalty and team-play are fundamental to Joe's modus operandi. With this, he is inclusive and open to the input of a diverse population. He is generous with his time, builds relationships that last, and he has a deep desire to understand the contexts of others. In service of this, he reaches into the organization and is always ready to work shoulder to shoulder with all levels of the organization to understand their experiences. He has a healthy respect for hierarchy yet at the same time is not hierarchical with his reports. Trust and respect are very important to him

and he starts any new relationship, particularly with a person in an authority role, with optimism yet also with skepticism, looking for positive signs that his loyalty and trust is warranted. In consequence, he is deeply impacted when this trust and respect is challenged. His communication style is welcoming, and he readily shares knowledge and information. Despite his social outer core and support for others to be open with him, his independent streak makes him selective to whom he opens up to at a personal level and this can make him harder to read and to get to know. Even when faced with less than positive situations, he maintains an optimistic front, in part because he doesn't want others to lose momentum, and in part because he is not comfortable showing his vulnerability.

In terms of **emotional intelligence**, Joe is highly learning-oriented and eager to grow himself. His development is steeped in courage and curiosity. He looks at every new opportunity as an adventure, enjoying the intellectual pursuit of the solution. This makes him open to learning from his experiences and to feedback. He is equally prepared to go after what he wants or to promote the next adventure. He is less one to stitch together his experiences and to consider the longer-term implications for him or his career. His longer-term view of his career is currently focused more on loyalty than aspiration. In relation to others, he likes to understand their motives and motivators. He recognizes talent and is a willing coach. He applies his intuition in these cases to understand them and works to adapt his style to have the most impact with them. His focus is on unleashing the passion of each individual and on looking for ways to place them where they will be most engaged.

Joe steps comfortably into the role of **leader**. This is punctuated by his inclusive and participative style. This said, while he puts his ideas out to others for input, it is important for him to maintain a sense of control. He doesn't feel compelled to be involved in everything and is comfortable when people take ownership of their accountabilities, however he likes to be in the know of what is going on. He will want to ensure his interest doesn't read as micromanagement. His leadership lens is toward people and how they are feeling. Thus, he invests time to get people on board with the direction he is proposing, and he is sensitive to not stepping on anybody's toes. In consequence, he is less one to set behavioural expectations, looking more to how he needs to adapt for them, than having them adapt to the culture he is trying to create. Operationally, once the plan of action has been set, he is astute at monitoring progress against this. He takes pride in the successes of others and is overt in his celebration.

Strengths

Joe's key strength is his **energy and passion**. He is optimistic, and possibility focused, jumping into any challenge with a confidence that he can find the path to success. This is supported with creativity, resourcefulness, and a willingness to experiment and try a new way of achieving a goal. This supports him as an individual, taking on new opportunities to grow and develop. It also supports him as a leader, building momentum and action focus in his followers. Grounding this in a vision of where he is taking the organization will further round out this capability.

Other Strengths

- Joe is **inclusive and engaging**. He does things with people, not to people. This drives a focus on bringing out the best in others. He is patient and will invest in listening actively to the perspectives of others. He takes his time and will ensure he is building a full understanding of those around him. People will follow him because they feel their interests are being supported and that they are a valued member of the team.
- Linked to the previous strength is an **astute ability to read people, and empathy to support their success**. He likes to understand the style and motivators of others, particularly of people on his team. He uses this to flex his style to better engage them. He also actively looks at how best to deploy people to capture their passion. To capitalize on this strength, he will want to index further how he connects people to the results he is looking to drive.
- **Loyalty** underpins Joe's persona. He is keenly committed to deliver on expectations that have been set for him. His loyalty also drives a dedication to the success of the organization he is working with and to the people around him. This feeds a confidence that Joe will always work in the best interest of the commitments he makes, and with this builds his credibility and followership.
- **Learning orientation and curiosity** steep Joe's style. He is reflective and thoughtful in assessing his actions and ready to learn from his experiences. This will serve him well in the next stage of his development which will involve him shaping his leadership story, his longer-term aspiration, and ultimately his leadership brand.

Key Development

Joe's key development is in support of his evolution as an executive within the broader organization. That is to bring together his experiences and shape what wants to stand for as a leader. It is a development opportunity that will take him from solving the next problem with the company to truly setting direction and leading the organization into the future. To optimize this shift in his development, a formal course on strategic leadership and the support of a coach to translate this learning into practice at the company would be a recommended approach.

Other Development Includes:

- Linked to the previous recommendation, Joe should learn to practice thinking more actively into the future and creating a longer-term vision for what he sees as possible. While he thinks about the potential consequences of actions he recommends, his lens is firmly on the challenge he is facing in the moment and not the longer-term view of what is possible.
- His **independence** is a strength that can become a weakness for him. On the positive side, he will move forward actively once he has a clear mandate. On the down side, he is less likely to allow his vulnerability to show, and more importantly, reach out and ask for help when it is needed. When he loses his direction or confidence, the risk is a tailspin as he tries to problem-solve in isolation. Letting go of his need to always be in control will help in seeking input and guidance more genuinely. This will also build his authenticity as a leader.
- As described on the strength side, Joe is very people oriented and sometimes his decisions will over index on the person vs the result he is driving for. He will want to **develop a more pragmatic view around people and people decisions** as he moves into his enterprise leadership role. This doesn't mean that he must let go of his natural tendency to want to optimize the capability of the individuals reporting to him, but rather to test his thinking against his established vision and strategy. Working with a coach will help him in this.
- Joe is a quick and intuitive thinker. This allows him to determine a course of action quickly. His decisions are generally grounded in logic, but he will want to **ensure his quick thinking doesn't overwhelm others**. He will therefore want to **edge up his analytical reasoning** to ground and assert his decisions, and thus explain the rationale behind his thinking.