

**“Can this team take you where you want to go?”**

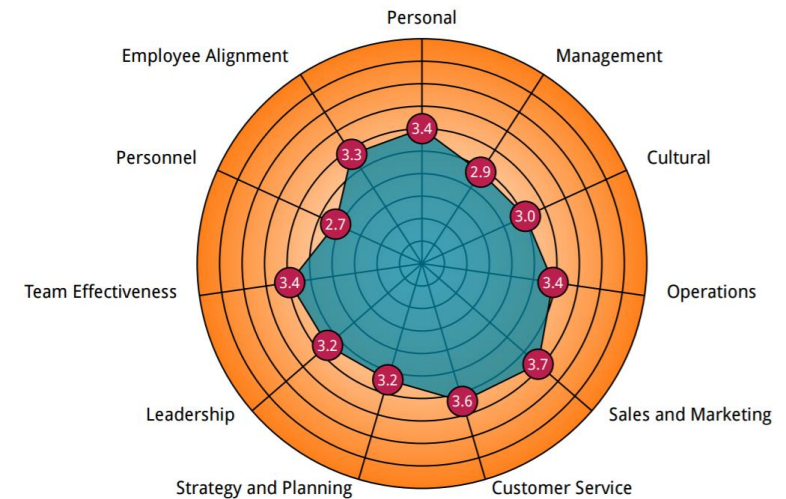
We have the plan, but do we have the team to execute it?

We had all the numbers in front of us. Suddenly it became very apparent. It all made sense, why this team wasn't performing at a high level. Having completed and received, a Team Assessment, and a 3 Part Individual Assessment from everyone on the team, it became very apparent what the biggest challenge for this team was. With this team, they had very smart committed people, but they lacked one essential element, they lacked people on the team who were willing to take ownership of their challenges. This one problem resulted in meeting after meeting of discussion of an issue, with no resolution, no follow through. The amazing part is when you can see the number's that explain why. This analysis leads to the team being able to develop strategies to resolve this issue that is holding them back!

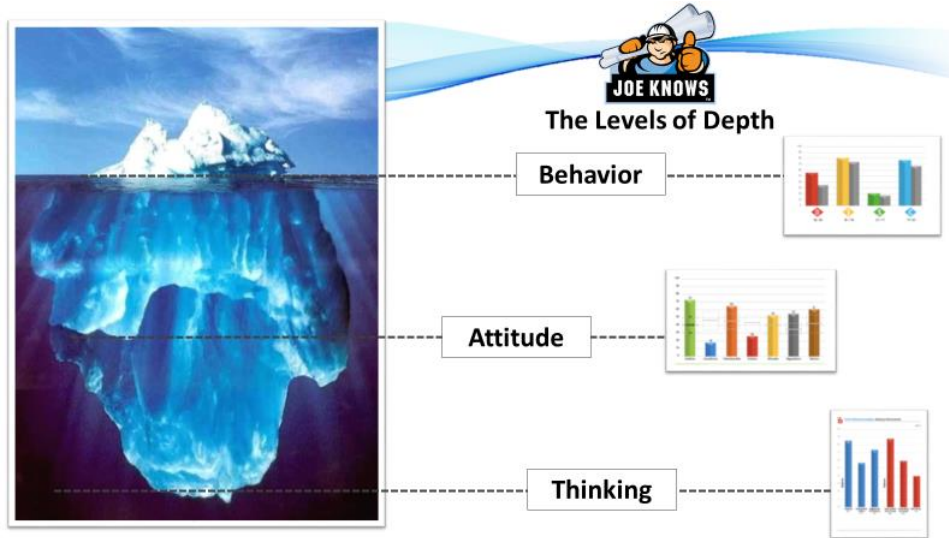
We love to help leaders lead! We combine the latest leadership thinking, including lean and people first leadership, with technology. This technology includes behavioral analytics and digital platforms to review data. Together, these provide the forum for discovery and improvement that are unique for each team

In this paper, we look at several case studies. Over the years, we have learned that leading at a high level is tough. At a high level, each team member must perform at their personal best. The combination of these team members working at their best and aligned to achieve a common goal creates maximum value for the team. Using behavioral analytics to strategies makes this possible.

To understand these case studies, we first need to understand the process that we take the leadership through. First, they are asked questions about their part of the organization. How is it performing on a scale of 1-5 in several dimensions? If we are working with the overall organization, then this includes feedback on the effectiveness of sales, operations, marketing, service, etc.



Team members then assess themselves. This process includes how they behave, what they value and how they think. We utilize tools that have been developed to uncover subconscious thinking that drives our behaviors.



**If you don't have information, you don't have a strategy!**

**Case Study 1- Lack of Accountability:**

With this team, we first discovered their organizational improvement focus. The lack of management training wasn't allowing the team to grow quickly, and the Democratic culture wasn't working. The sales and productions team didn't trust each other. The focus is on a Critical Event, getting the client's decisions early enough. This event then leads to a discussion of a culture that lacks accountability. All parties agreed that they wanted accountability and need to impose deadlines on themselves and their clients.

Looking now at the individual's assessments, as a team, it became apparent that there is a reason why this was happening. They have two blind spots. Areas of lower scores that are impacting their performance.

Members	A	Econ	I	Pol	A	Reg	Theor.
Bill	26	36	58	73	41	60	60
Joe	55	79	26	58	48	60	36
Dan	55	68	25	40	51	78	43
Scott	43	68	80	46	16	35	71
Tom	90	38	66	18	63	33	46
Jim	85	38	43	41	61	33	53
Steve	75	36	71	41	16	61	53
Lebron	63	99	35	53	35	46	30
Kevin	78	30	43	48	25	43	86
Mark	63	83	30	33	18	63	73
Luke	75	49	51	30	26	35	91
	708	624	528	481	400	547	642
	64	57	48	44	36	50	58

Utilizing the Value Index part of the assessment tools, we see that the teams lowest two scores were in the areas of A (36 average), altruistic, willingness to help and in the field of Pol (44 average), political, willingness to take ownership. These two low scores indicate a systemic issue with this team.

This insight led to an awareness that had not existed. What can the team do to overcome this problem? Could they change the people on the team? Could they leverage those who are highest in these areas? Perhaps do some training and build systems that utilize technology to overcome these blind spots? This team is utilizing Bill, who scored 73, to build and maintain an accountability system.

**Case Study 2 -Cautious Team, holding back growth.**

With this team, their most important area of improvement was trying to scale the business by building a performance culture. To do this, the team needs the leadership to lead change. They need to get beyond their individual silo thinking and develop repeatable systems. Looking at their own assessments, we see that there is a reason why this is happening.

Member	D	I	S	C
Cathy	81	81	32	46
Debby	81	81	17	67
Dan	21	39	99	99
Bill	35	99	99	25
Joe	25	39	88	99
Betsy	42	67	53	67
Cindy	67	39	39	99
Jim	56	60	53	53
Joan	21	46	99	88
Emily	25	38	88	99
Jon	49	81	39	67
Andrew	49	39	77	77
Nicole	25	81	77	53
	577	790	860	939
	44	61	66	72

Utilizing DISC part of the assessment tools, we see that they are a cautious group. Seven of 13 of them scored highest in this category. This is indicating a natural tendency to be careful. Four team members had a score of 88 or above. While it is essential to have a good balance on the team, in a fast-moving environment these people are naturally going to resist change. This insight led us to an awareness and a strategic discussion about how to overcome this blind spot. The group is focusing on building systems that all agree will manage the perceived risk of growth and training the leaders to lead more efficiently. This is inspiring their teams to build the business rather than individually trying to do so.

**Case Study 3- Transition from Entrepreneur to team leadership.**

With this team, we discovered that the primary concerns were that the systems and training were not ready for the anticipated growth. As we looked at the individual assessments, we found the following. Through the Value Index, we discovered that the Entrepreneur was ready to turn over leadership to a leadership team. We then looked more closely at the proposed leadership team and found the following.

Members	Envisioning outcome	Understanding supporters	Communicating Vision	Serving Others	Inspiring Others	Guiding Others	Developing self
Skip	7.9	9	7.1	9	8.2	7.8	6.7
Kyle	6.50	7.7	6.20	7.70	7.00	6.60	5.20
Triston	7.00	6.2	6.90	6.10	6.50	6.40	6.70
Bill	7.1	7.2	7.1	7	7.4	7.2	6.7
Kevin	6.5	8.6	6.4	8.2	7.4	6.7	5.3
Rob	6.90	8.3	6.70	8.30	7.60	7.10	6.50
Mary	7.90	8.5	7.70	8.20	8.30	7.90	7.50

Utilizing the Attribute Index for leadership it was apparent that there is a high level of ability to understand their supporters and serve others, but a lower standard of ability to envision outcomes, communicate the vision and guiding others.

With this in mind, the entrepreneur and leadership team can have strategic discussions and look at options such as who should be in what role, should someone else be added to the team, and what training needs to happen.

### Case Study 4- Preplanning and communication

With this team, we discovered that the primary concerns are that the team had not consistently preplanned and communicated with their individual members. The team was rolling out a detailed cost tracking system to facilitate pre-planning feedback.

Members	Dimensional Balance		
	Empathy	Practical Thinking	System Thinking
Mark	6.9-	7.1-	4.3+
Matthew	6.9-	8.1-	8.3+
Luke	8.3=	9.0-	7.6+
John	9.0-	8.1-	8.3+
Peter	6.9-	8.6+	7.1+
Adam	5.5-	5.7+	8.1+
Eve	5.0-	7.9-	7.9+
Simon	8.1+	7.1-	7.4+
Daniel	9.3=	8.8-	8.3+
Paul	8.3-	8.1-	7.6+

As we looked at the individual assessments, through the Attribute Index, Dimensional Balance report, we discovered that the team had relatively high scores in all three areas. Empathy, their understanding of people. Practical Thinking, their ability to get things done. System Judgement, their ability to build and implement systems. Therefore, we concluded that they can do the pre-planning and communication at a higher level and that the primary issues were one of not having the needed training and systems in place. With this info, the team set up daily and weekly reminders to facilitate accelerated learning.

**Joe Knows loves to help leaders lead.** Through these case studies, you can see how we do this. With a combination of insight about the team's performance and individual assessments, we develop further insight that leads to alternative strategies. These plans are based on objective information and can be implemented with more confidence and an objective way of checking progress.