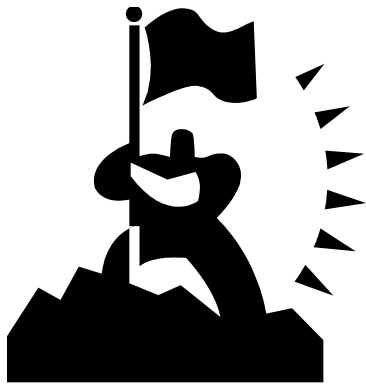
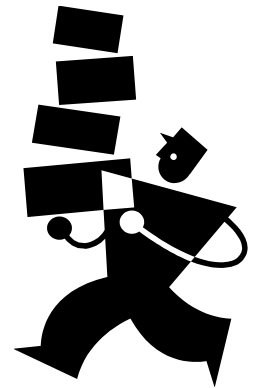


# Real-Life Stories about Familiar Leadership Challenges



A D V I S A  
Creating Confident Organizations

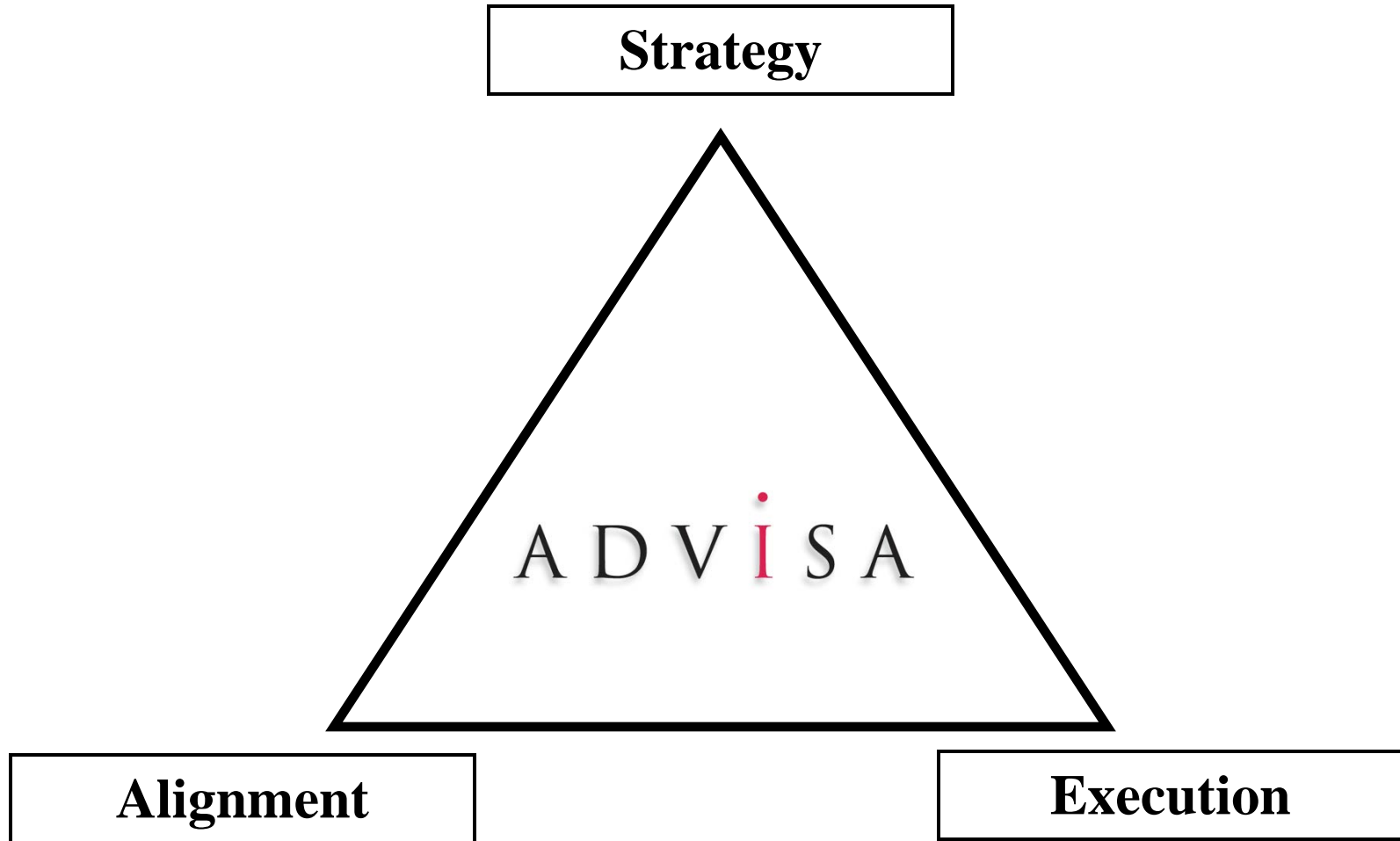
Paul Dumouchelle  
Management Consultant  
[www.advisausa.com](http://www.advisausa.com)



# Creating Confident Organizations

## The Triangle of Confidence

A D V I S A



# Creating Confident Organizations

## The Triangle of Confidence

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### Strategy

*WHAT ARE OUR GOALS?*

- Mission
- Values
- Vision
- Objectives

### Alignment

*WHO WILL ACHIEVE OUR GOALS?*

- Hiring and Selection
- Leadership Development
- Organizational Structure
- Performance Metrics
- Succession Planning



### Execution

*HOW WILL PEOPLE ACHIEVE OUR GOALS?*

- Motivation & Coaching
- Teamwork
- Innovation
- Change Management
- Sales Skill Training

# “Real-Life Stories” Focus on Alignment & Execution



## Alignment

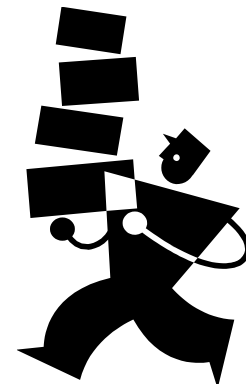
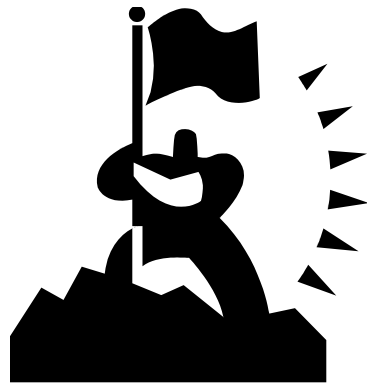
*WHO WILL ACHIEVE OUR GOALS?*

- Hiring and Selection
- Leadership Development

## Execution

*HOW WILL PEOPLE ACHIEVE OUR GOALS?*

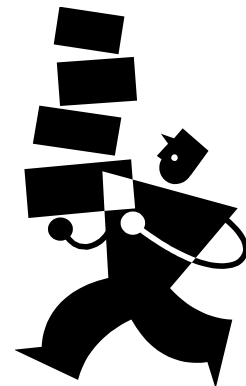
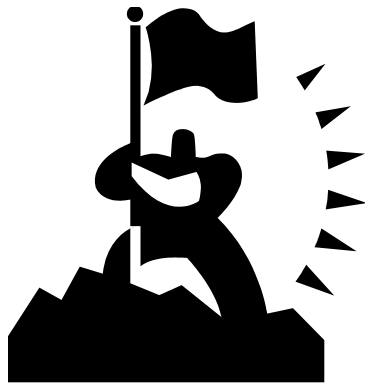
- Motivation & Coaching
- Teamwork



# “Real-Life Stories” & Anonymity

**The “Real-Life” element in this material involves the management issues and the types of people involved.**

**Other details have been changed to protect confidentiality.**



# “Real-Life Stories” Headlines

## Leadership Effectiveness

1. When the “Golden Rule” isn’t Good Enough
2. Communicating with Someone who Will Not Listen
3. Getting a “Perfectionist” to Delegate Work
4. Am I Doing a Good Job?



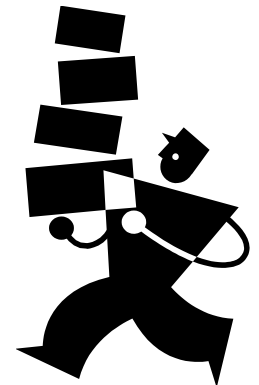
## Teamwork

5. Herding Cats
6. Rules? What Rules?
7. Defusing Conflict



## Job Fit

8. “Stop Chatting & Get to Work” – Do You Say That Too Much?
9. Knowing Exactly What You Want



# “Real-Life Stories” Headlines

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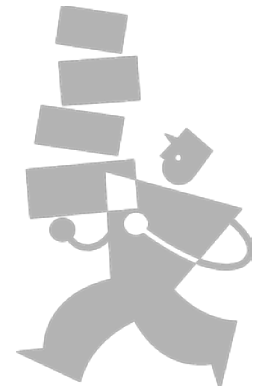
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# When the “Golden Rule” isn’t Good Enough

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## Scenario:

- A team conducts research for a professional services firm.
- Large reductions in team headcount took place during the 2008-2009 recession.
- With sales recovering, the company isn’t getting fast enough responses from the team and needs to correct the situation.



# When the “Golden Rule” isn’t Good Enough

A D V I S A

## The Issue:

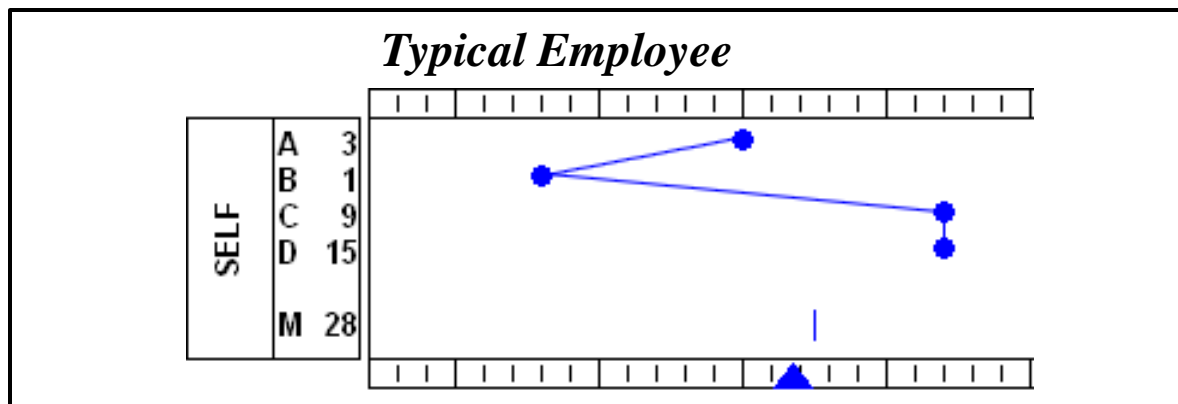
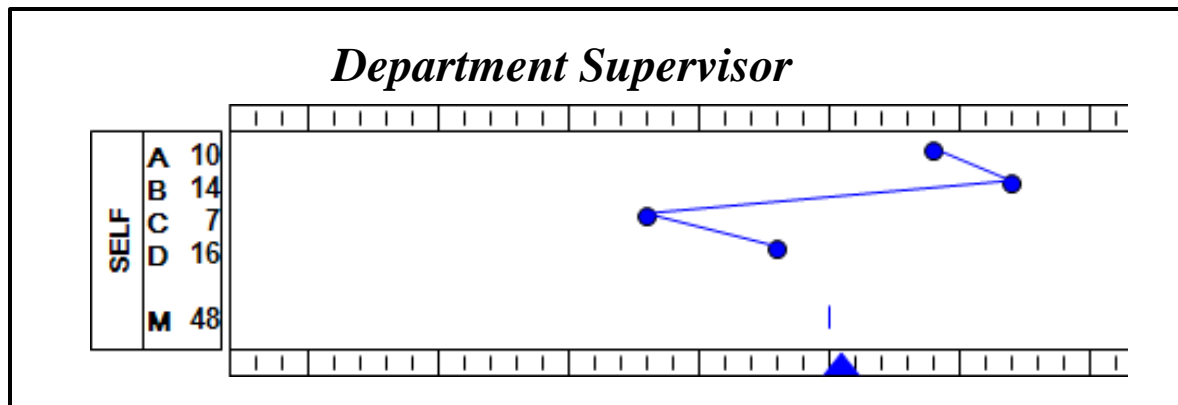
- The team complains that their Supervisor does not communicate with them well.
- The Supervisor is an impatient extrovert who loves to talk with everyone in the company and he is shocked, and even hurt, by his team’s complaint.
- The typical employee is an introverted, “heads-down” worker who focuses on data and facts while preparing reports.



# When the “Golden Rule” isn’t Good Enough

## PI Patterns:

The Predictive Index® Organization Survey (PI) provides objective personality descriptors.



# When the “Golden Rule” isn’t Good Enough

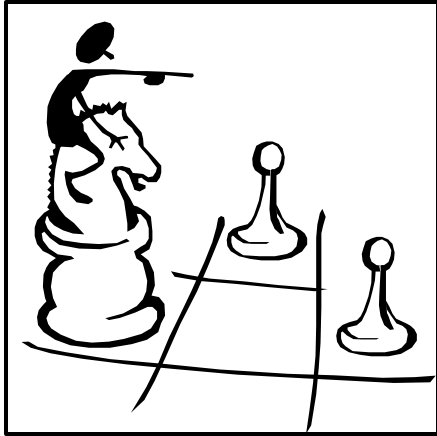
A D V I S A



## Analysis:

- **The fundamental disconnect revolves entirely around communication style.**
- **The Supervisor is a natural communicator with good interpersonal skills & was blind-sided when communication dysfunction created performance shortfalls.**
- **Team-members still worry about their employment status. One-on-one conversations makes those not included suspicious. Constant updates on “news” in the company are disjointed interruptions that get in the way of work.**

# When the “Golden Rule” isn’t Good Enough



## Recommendations:

- **The Supervisor should focus on the communication needs of his team rather than rely on his natural style.**
- **His team will understand and respond more effectively to structured, formal communication that puts everybody on the same page at the same time.**
- **Taking the time to explain in detail how changes impact current priorities to maximize workflow predictability will pay dividends in improved performance work.**

# When the “Golden Rule” isn’t Good Enough

## Results:

- The Supervisor began regular team meetings with advance agendas and follow-up “minutes” to document key decisions.
- The Supervisor delegated the meetings’ administrative tasks to ensure quality work.
- The communication dysfunction ceased to be a problem.



# When the “Golden Rule” isn’t Good Enough

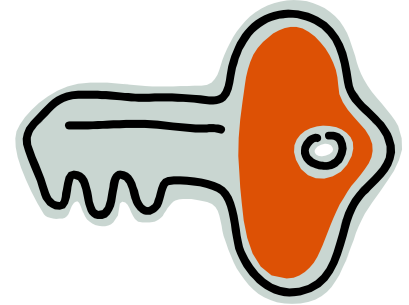
A D V I S A

## Key Lesson:

Leadership effectiveness improves when leaders focus on what the others in their team need – not their own needs.

Try the “Platinum Rule” . . .

*“Treat others in the way they  
like to be treated.”*

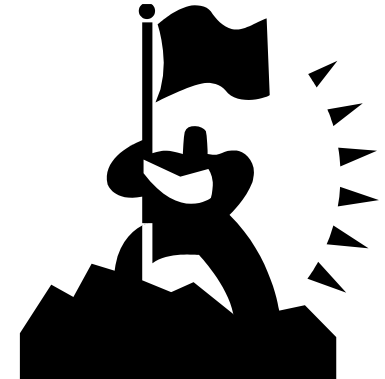


# “Real-Life Stories” Headlines

A D V I S A

## Leadership Effectiveness

1. When the “Golden Rule” isn’t Good Enough
- 2. Communicating with Someone who Will Not Listen**
3. Getting a “Perfectionist” to Delegate Work
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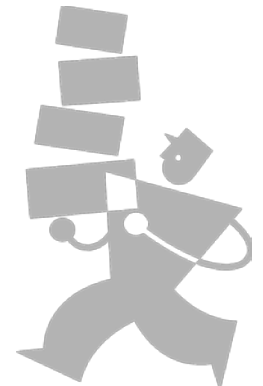
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# Communicating with Someone Who Will Not Listen

## Scenario:

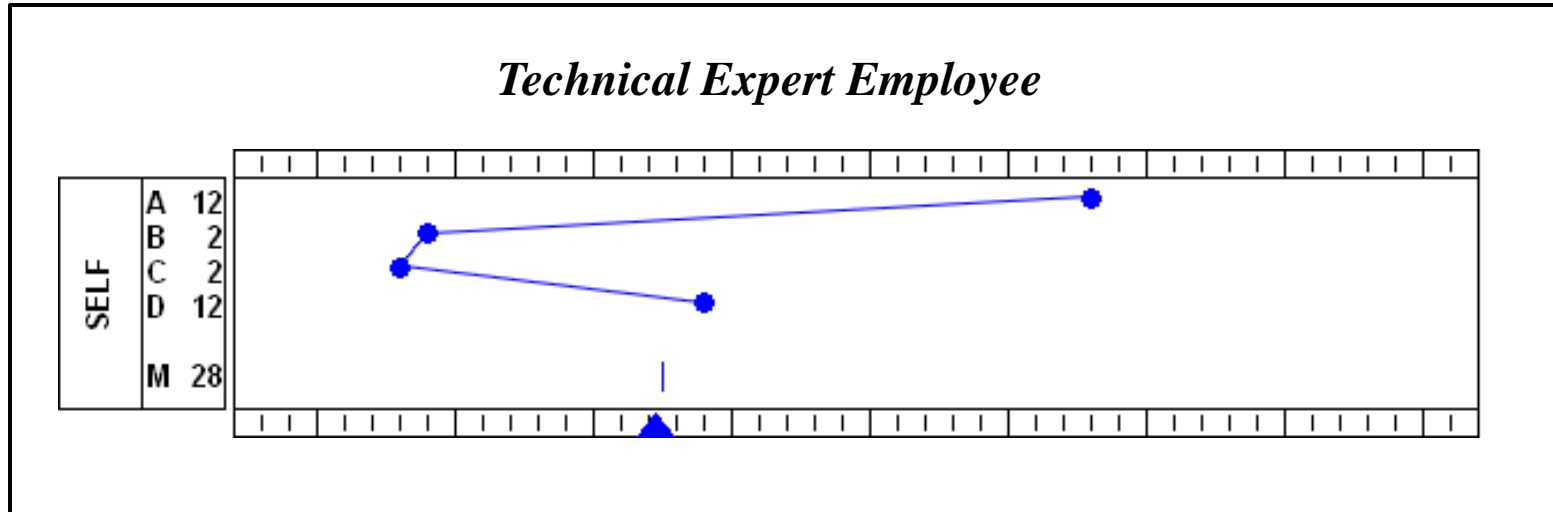
- A long-term and valuable employee is in a key role as a technical expert supporting front-line operations in a service business.
- This person can solve problems that others cannot.
- Despite these positives, several issues need correction.



# Communicating with Someone Who Will Not Listen

## PI Pattern:

The Predictive Index® Organization Survey (PI) provides objective personality descriptors.



# Communicating with Someone Who Will Not Listen

A D V I S A

## The Issue:

- The person's behavior matches his PI Pattern
- Some behaviors simply support his good results – He thinks his ideas are best; He thinks and acts independently; He seeks authority & control
- There are also negative aspects that are the key issue – He dismisses others' input; He refuses to share information; His solutions can create “collateral damage” that negatively impacts the overall system



# Communicating with Someone Who Will Not Listen

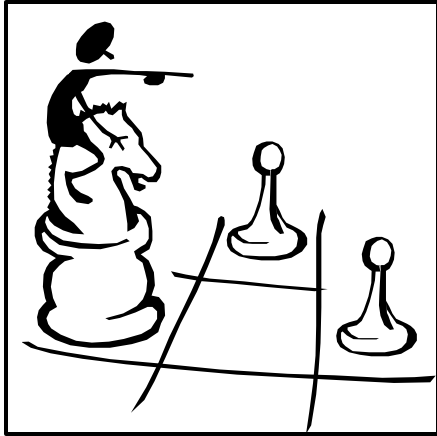


## Analysis:

- **Coaching this type of person into new behavior is a very difficult challenge.**
- **The person wants to maintain control of their side of the relationship. Simply telling them what to do or coaxing them is usually ineffective.**
- **The primary rule is to ensure you and they are in agreement on the goal. Once this is done in an effective way, you can give the person the independence and freedom they desire in reaching that goal.**

# Communicating with Someone Who Will Not Listen

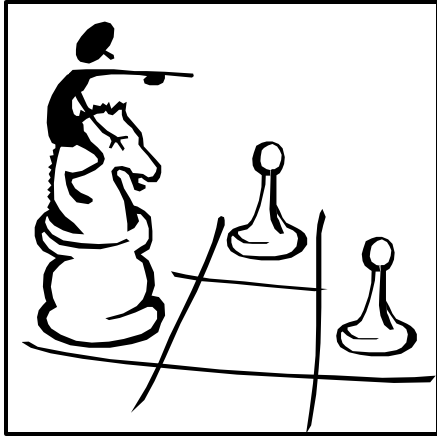
A D V I S A



## Recommendations:

- Create agreement on a goal through collaboration - and if that doesn't work, by maneuvering the person into thinking the goal is their own.
- If YOU say an idea then you immediately take ownership and the other person will never truly own it.
- It is important to have the other person think of the idea AND say it, too. Get there via LEADING QUESTIONS - questions that can only be answered one way, or questions where you already know the answer.

# Communicating with Someone Who Will Not Listen



## Recommendations (continued):

Some examples in this scenario include:

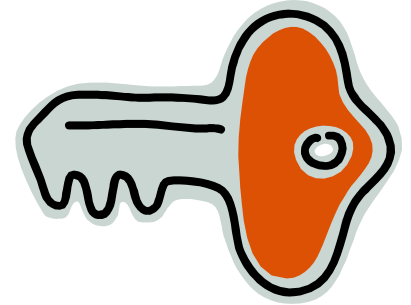
- *Do you think it helps our customers when your colleagues can't answer a question because only you have the necessary information?*
  - *If the solution to a problem creates another, bigger problem, is that a good solution?*
- 
- **Once the other person states the obvious, you can then ask them how to avoid this situation and let them craft the solution, or at least take part in crafting it.**

# Communicating with Someone Who Will Not Listen

A D V I S A

## Key Lesson:

Simply telling people what goals to pursue, and how to pursue them, does not lead to good results with strongly independent, assertive and self-motivated individuals.



# “Real-Life Stories” Headlines

A D V I S A

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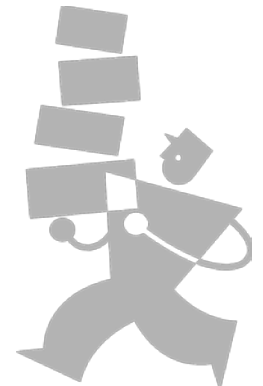
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## Job Fit

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# Getting a “Perfectionist” to Delegate Work

## Scenario:

- A company has fast-growing volume in a key product area and is struggling to keep up with demand.
- Part of the solution is to expand labor capacity by hiring new workers and promoting a skilled and experienced employee to supervise them.



# Getting a “Perfectionist” to Delegate Work

## The Issue:

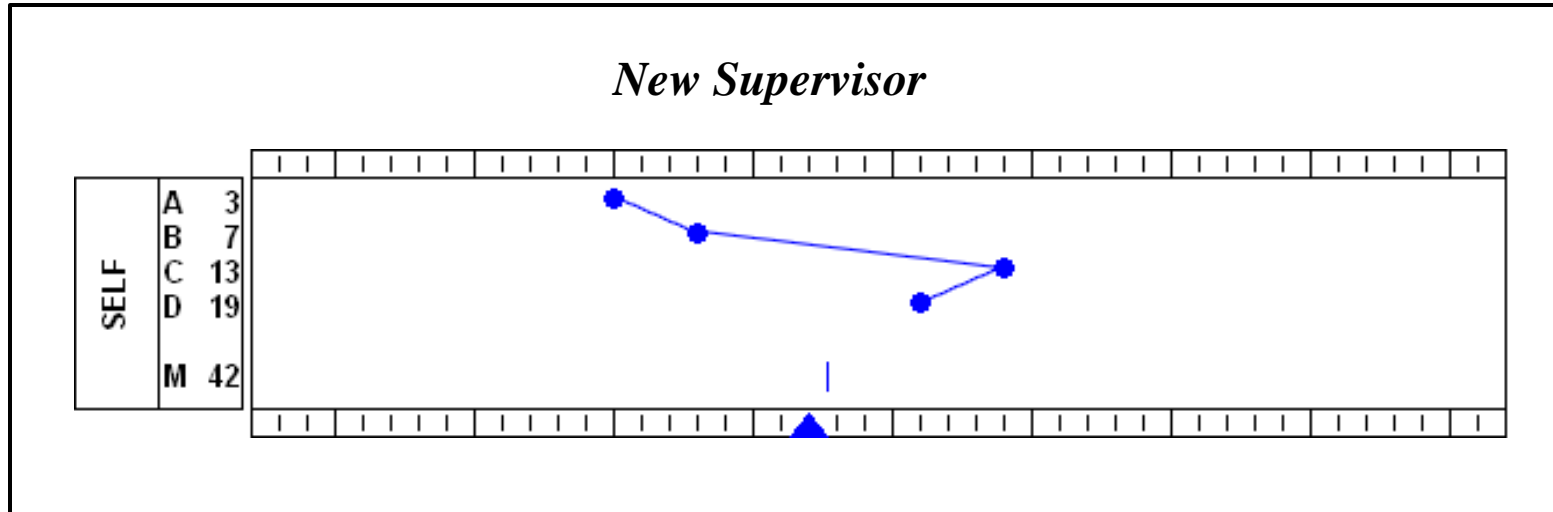
- The new supervisor is reluctant to delegate tasks to his new subordinates; he says they are not ready yet.
- The supervisor continues to do too much of the work himself - creating a bottleneck.
- The supervisor spends too much time on the job and has stress-related diseases that could worsen if this situation continues.



# Getting a “Perfectionist” to Delegate Work

## PI Pattern:

The Predictive Index® Organization Survey (PI) provides objective personality descriptors.



# Getting a “Perfectionist” to Delegate Work

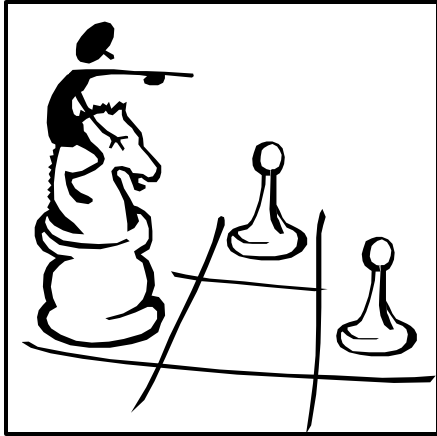


## Analysis:

**Two related issues exist here, one focused on the need for delegation, the other about stress.**

- **By saying his newly-hired subordinates “are not ready” the Supervisor feels delegation is too risky. This risk avoidance is a core element of the Supervisor’s decision-making.**
- **Patient, methodical people do not thrive on pressure. The increased activity & the recent promotion have created more stress. The person’s health adds urgency to the need for a management solution.**

# Getting a “Perfectionist” to Delegate Work



## Recommendations:

- **The Supervisor’s Boss should force the delegation and take the risk on herself. That is, if the new-hires do not perform adequately the Supervisor would be held harmless. This is a tried-and-true approach to finesse a risk-averse person and keep an organization moving forward.**
- **Another way to reduce stress would be to redesign the process with more-efficient methods. This is the best way to make methodical people more-productive.**

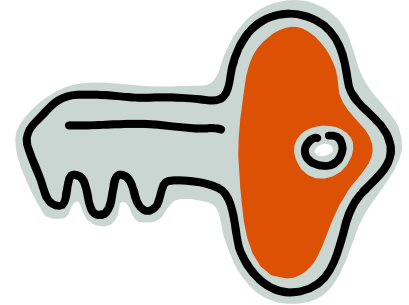
# Getting a “Perfectionist” to Delegate Work

## Key Lesson:

The risk orientation people have in their personality has a profound impact on their decision-making.

If people are not taking action because it appears too risky then:

1. Take the “ownership” of the risk away from them (as in this case), or,
2. Find a way to eliminate the risk (e.g. more research, new methods)



# “Real-Life Stories” Headlines

## Leadership Effectiveness

1. When the “Golden Rule” isn’t Good Enough
2. Communicating with Someone who Will Not Listen
3. Getting a “Perfectionist” to Delegate Work
4. **Am I Doing a Good Job?**



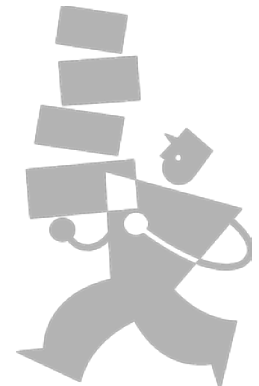
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## Job Fit

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9. Knowing Exactly What You Want



# Am I Doing a Good Job?

## Scenario:

- **A New Manager was hired to run a key operation.**
- **The New Manager had done the exact same job at another, identical type of business.**
- **The Boss supervising the New Manager did not have direct experience in the New Manager's type of operation. There was no job description for the New Manager's position.**



# Am I Doing a Good Job?

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## The Issue:

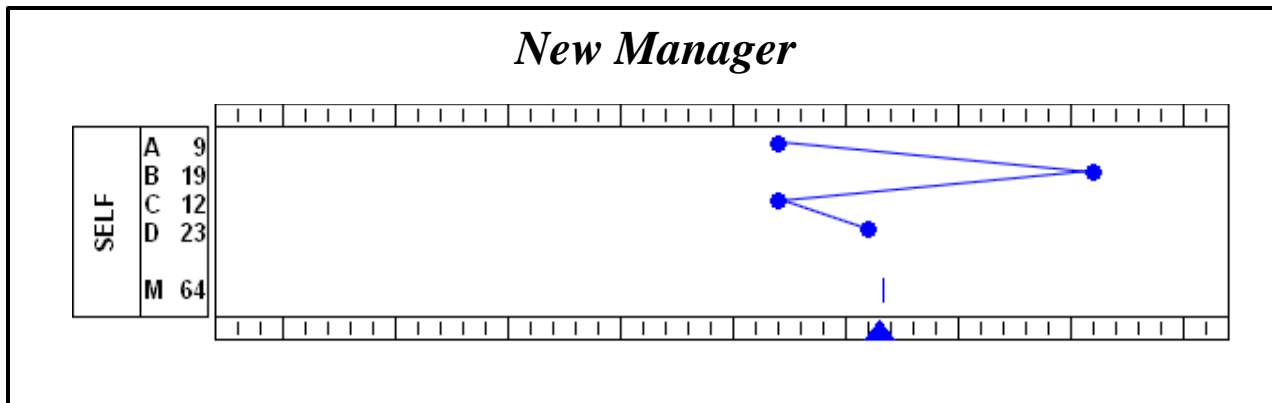
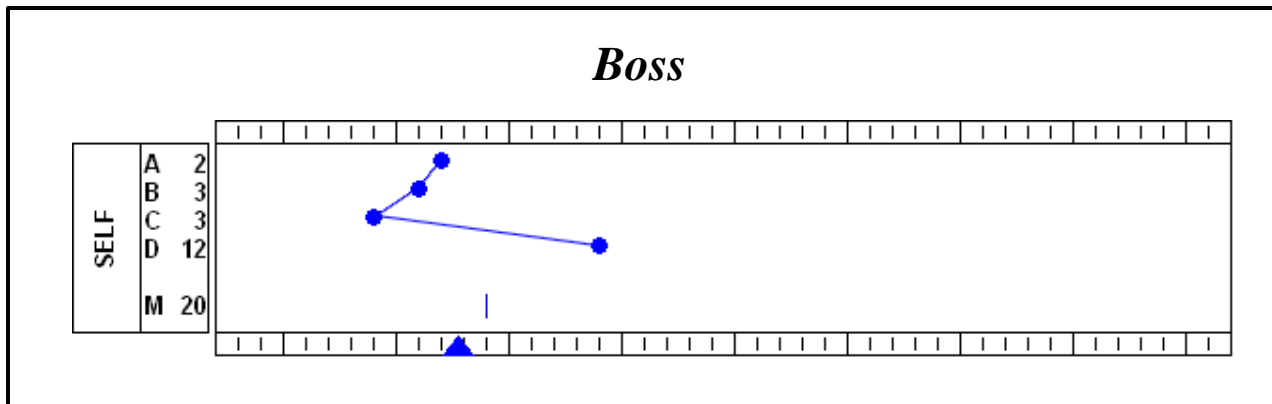
- **The Boss expected the Manager to know how to run his operation by himself.**
- **After one month on the job the Manager called the Boss at home to ask, “Am I doing a good job?” The Manager also had daily questions and asked for confirmation that the Boss agreed with the Manager’s plans.**
- **The Manager’s questions undermined the Boss’ confidence about this new hire.**



# Am I Doing a Good Job?

## PI Patterns:

The Predictive Index® Organization Survey (PI) provides objective personality descriptors.



# Am I Doing a Good Job?

A D V I S A

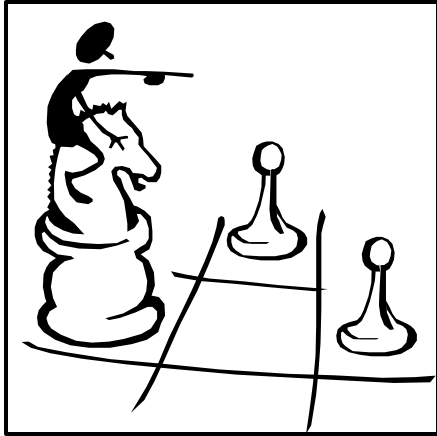


## Analysis:

- The call to the Boss at home asking “Am I doing a good job?” was like a cry for help!
- The extroverted Manager defines success in terms of how he is accepted and viewed by others. The highly formal Boss defines success with an objective standard, doing what is “right.” The Boss expected the Manager to know what “right” was based on his prior experience.
- The Boss preferred working on his own and assumed the Manager would share this preference.

# Am I Doing a Good Job?

A D V I S A



## Recommendations:

- **Develop a Job Description TOGETHER to clarify expectations and feed the Manager's desire for interaction with the Boss.**
- **Praise the Manager (particularly in front of others) to build confidence that the Boss approves the Manager's actions.**
- **After a conversation with the Manager about an issue clarify with him that he understands expectations and confirm that a conversation won't be necessary on this topic in the future.**

# Am I Doing a Good Job?

A D V I S A

## Results:

- **The Boss was relieved that the New Manager's behavior was due to his personality and not an inability to fulfill his new job's responsibilities.**
- **With an understanding of the New Manager's need for personal approval the Boss felt he had a "roadmap for success" in dealing with his new subordinate.**

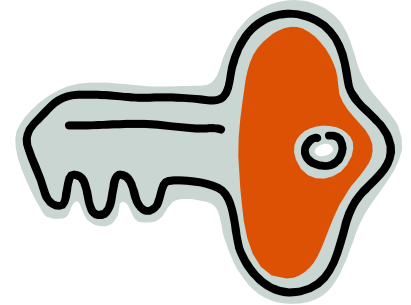


# Am I Doing a Good Job?

## Key Lesson:

**Self confidence impacts job performance.**

**Understanding people's source of motivation (e.g. from others for the Manager, from an objective standard for the Boss) provides a foundation for establishing performance expectations.**



# “Real-Life Stories” Headlines

A D V I S A

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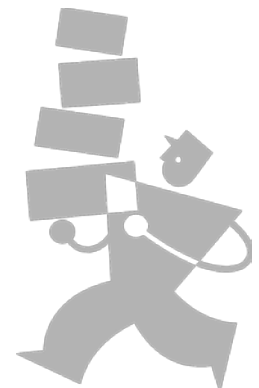
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## Job Fit

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# Herding Cats

A D V I S A

## Scenario:

- A distributor of industrial components has an executive team with several new members.
- The CEO wants to maximize collaboration and cooperation among his team.
- In addition to the CEO there are leaders of sales & marketing, engineering, operations, supply chain and finance.



# Herding Cats

## The Issue:

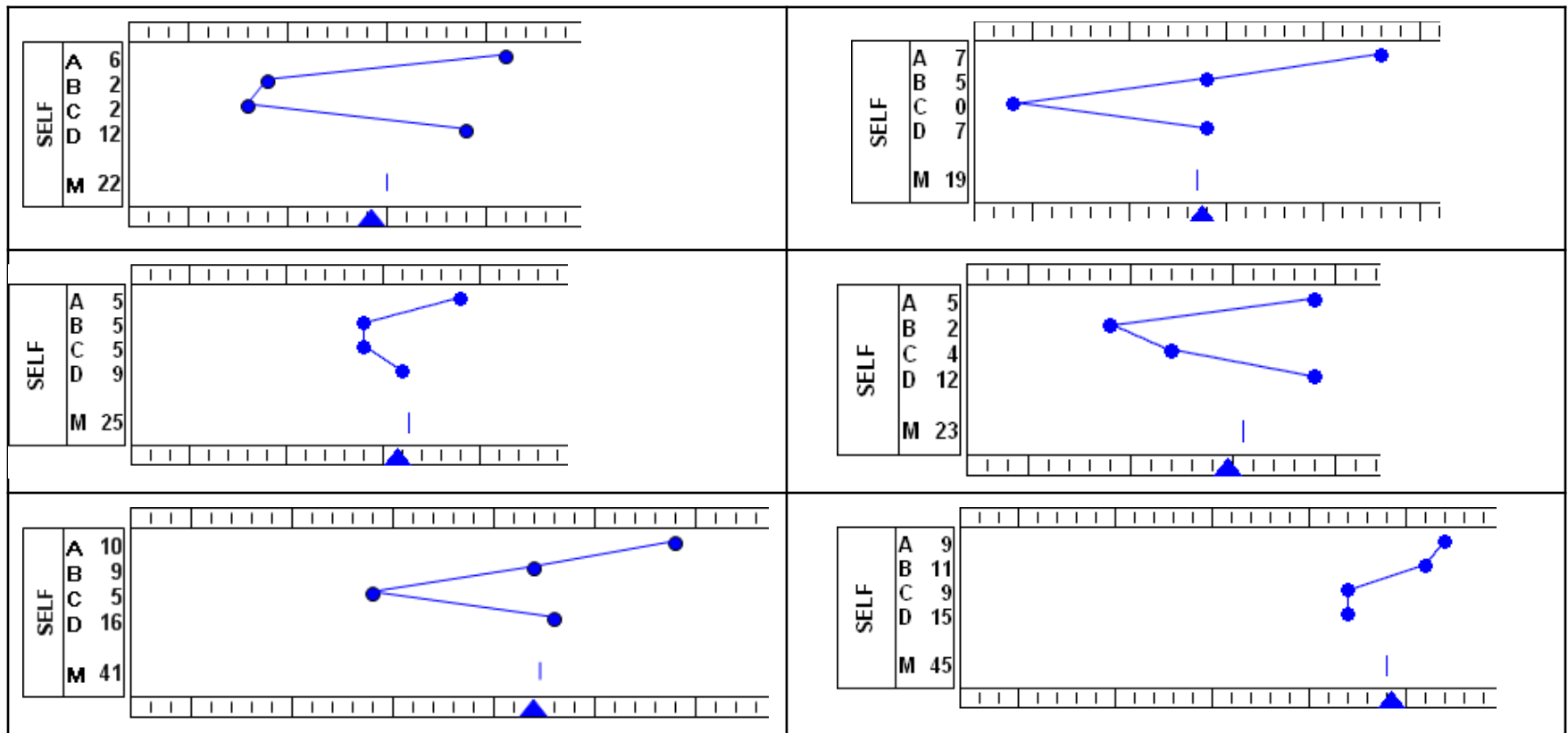
- As with many business leadership teams, this group of senior leaders contains a large number of people with very strong wills.
- They achieved leadership roles by accepting difficult challenges and succeeding in the face of competition.
- Collaboration and cooperation is not “natural” for them.



# Herding Cats

## PI Patterns:

The Predictive Index® Organization Survey (PI) provides objective personality descriptors.





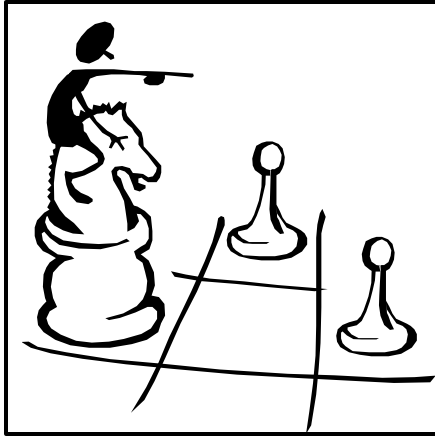
## **Analysis:**

- **Analyzing team dynamics requires consideration of many different factors.**
- **In addition to the complexity of all the different PI patterns, one must consider each participant's position or role.**
- **Finally, teamwork itself has many aspects to it, so the complex evaluation described above must consider multiple elements such as communication, problem-solving and decision-making.**



## Analysis (Continued):

- **Start a team-analysis challenge by looking for common elements in the PI patterns.**
- **Everyone on this team is a Low C and is Technical ( $A > B$ ). Thus they are on the “same wavelength” here.**
- **What stands out with the group, however, is the fact that they are all Highest A. Managing this element is likely to be the most-important challenge because High A’s by their nature like to pursue their own ideas and value independence – preferences that run counter to a team orientation.**

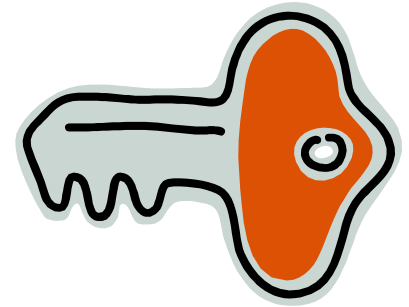


## Recommendations:

- **Ideal teamwork with High A's involves 3 Steps. We start with agreement to a COMMON GOAL, similar to earlier story.**
- **DEFINE TURF** and provide as much independence and ownership as possible in their designated “turf.”
- **Implement a CONFLICT-RESOLUTION MECHANISM.** These people are comfortable with conflict and will engage in conflict as necessary to pursue success. If conflict jeopardizes team success be prepared to resolve conflicts productively.

## Key Lesson:

**People who need independence, freedom and control can be productive team players but maximizing their contribution requires an approach that respects those needs.**



# “Real-Life Stories” Headlines

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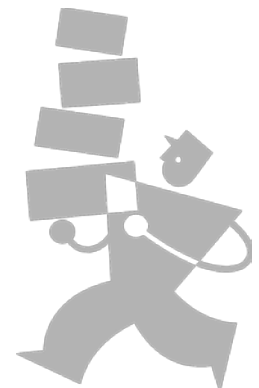
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## Job Fit

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# Rules? What Rules?

A D V I S A

## Scenario:

- A client came to me with a serious issue that was hurting her team's productivity.
- A project Team-Leader for an engineering firm working on a construction project had a serious conflict working with the account Salesperson.
- Their inability to cooperate with one another threatened to undermine the project's progress.



# Rules? What Rules?

A D V I S A

## The Issue:

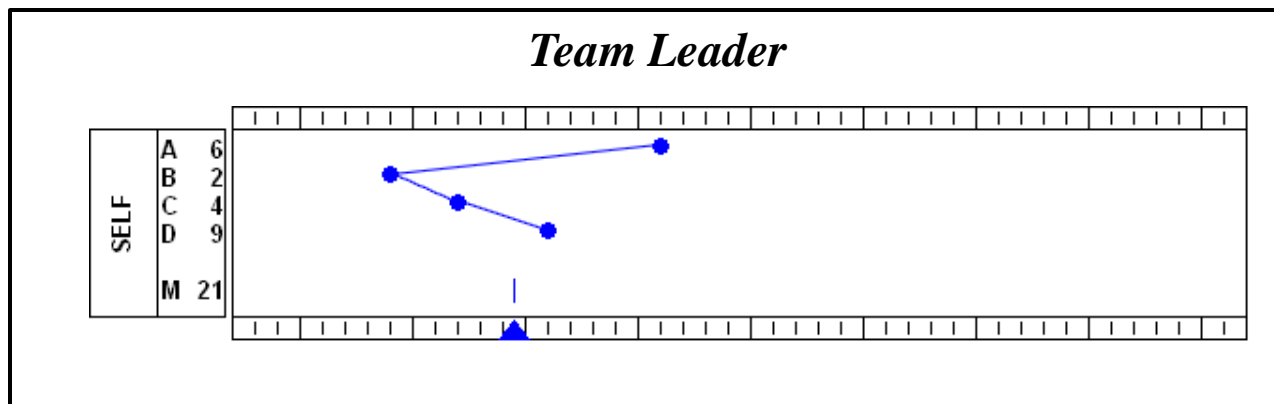
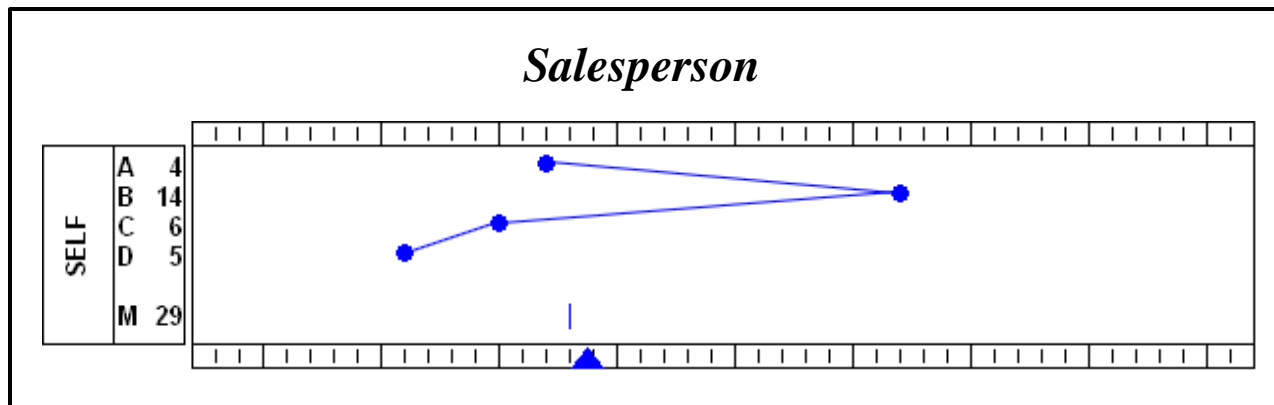
- The female Salesperson met the male Team Leader at the construction site wearing open-toed shoes. She had called in advance and gotten the client's OK since they would not be in areas needing protective gear.
- The Team Leader was angry because her footwear was inappropriate for a construction site & he felt that the Salesperson should not have contacted the client without his knowledge or permission.



# Rules? What Rules?

## PI Patterns:

The Predictive Index® Organization Survey (PI) provides objective personality descriptors.



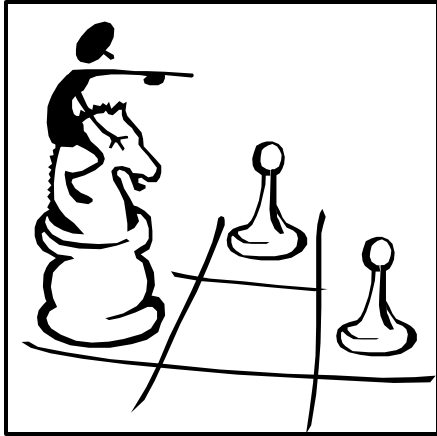
# Rules? What Rules?



## Analysis:

- **The Salesperson is mostly concerned with her relationships with others.**
- **Still, she has a disconnect with the Team Leader, whose priorities are all task, data and goal-related while she is concerned with feelings, emotions and relationships.**
- **Also, the Salesperson is not concerned with rules or respectful of authority, her clothing decision is natural behavior for her. Meanwhile, the Team Leader is very concerned with control and strongly protects his turf.**

# Rules? What Rules?



## Recommendations:

- Review each person's PI with the two people together so they can “depersonalize” this conflict by recognizing each other's differences in personality.
- It will be up to the two participants to use this understanding to modify their behavior in the future to avoid future conflicts.

# Rules? What Rules?

A D V I S A

## Results:

- The discussion with the two people led to greater self-awareness for the Salesperson.
- She realized that she would always be a bit of a misfit in this engineering firm's culture that was very task and data-oriented. She decided to pursue another opportunity.
- While an unintended consequence of the intervention my client considered it a worthwhile conclusion since she arrived at this decision on her own.

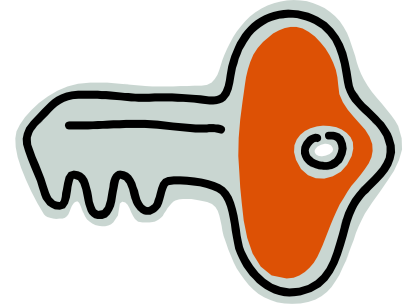


# Rules? What Rules?

A D V I S A

## Key Lesson:

Using PI as a “doorway” to a new understanding and relationship between people is one of the tool’s most-valuable applications.



# “Real-Life Stories” Headlines

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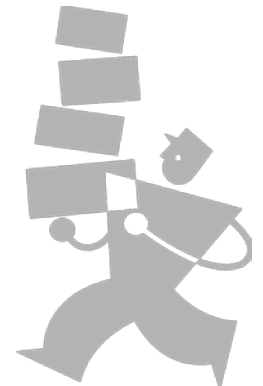
## Teamwork

5. Herding Cats
6. Rules? What Rules?
7. **Defusing Conflict**



## Job Fit

8. “Stop Chatting & Get to Work” – Do You Say That Too Much?
9. Knowing Exactly What You Want



# Defusing Conflict

## Scenario:

**A manufacturer has trouble with two key employees who constantly fight over key initiatives.**

**This conflict has stalled progress on key new technologies and needs to end.**



# Defusing Conflict

A D V I S A

## The Issue:

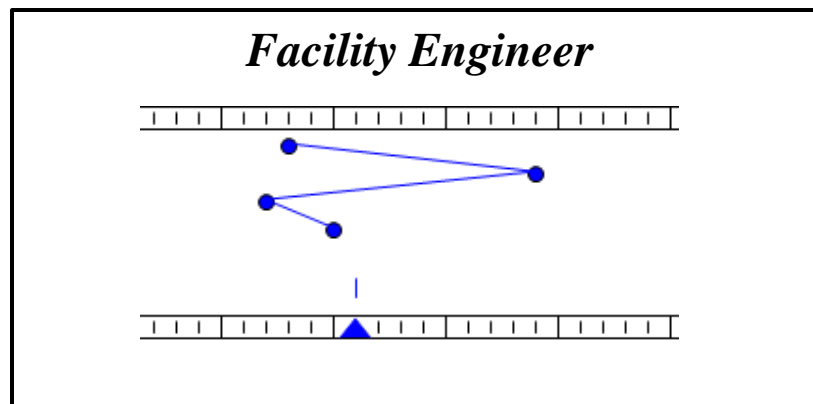
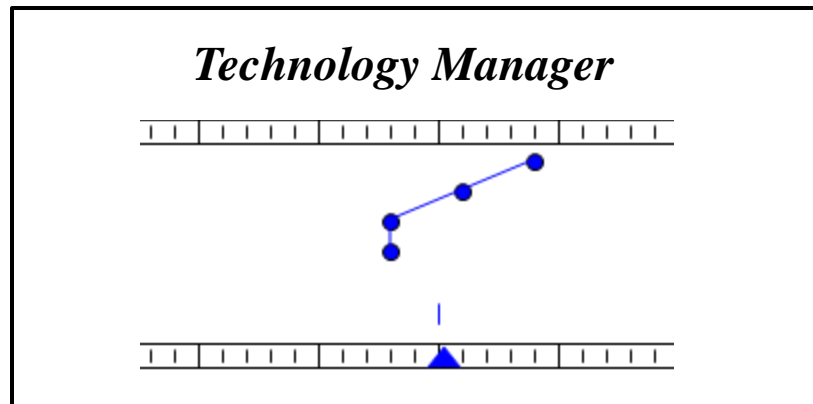
- **The Technology Manager (TM) is implementing a key new program. TM is a rapidly-rising talent with sponsorship of top-level executives. The Facility Engineer (FE) has been in the plant for over a decade.**
- **TM needs FE's cooperation to succeed but they fight constantly. FE feels disrespected for his contributions and feels TM takes too many risks. TM feels FE obstructs progress simply out of spite.**



# Defusing Conflict

## PI Patterns:

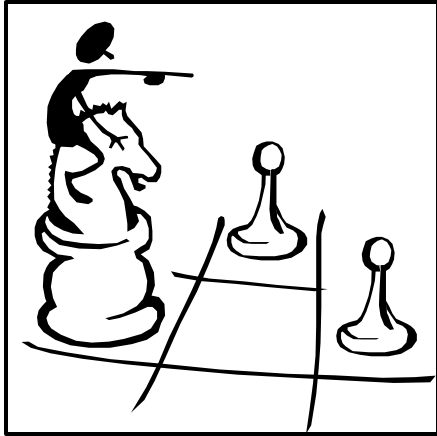
The Predictive Index® Organization Survey (PI) provides objective personality descriptors.





## Analysis:

- **TM does not listen to FE because TM is strongly focused on his own ideas to solving this technical challenge.**
- **TM has a strong risk-taking profile so he is comfortable with an untried approach – while FE prefers to minimize risk.**
- **FE places great importance on his role and status within the plant.**



## **Recommendations:**

- **FE should stop “telling” TM about potential problems and start asking questions so TM can form his own conclusions. Framing those questions in a way to highlight key information takes preparation and planning.**
- **TM should take time to talk face-to-face with FE and acknowledge his contributions – especially in front of others – this would pay huge dividends in obtaining FE’s cooperation.**

# Defusing Conflict

## Results:

Interpersonal conflict between these two people ceased to be an impediment to the project's success.

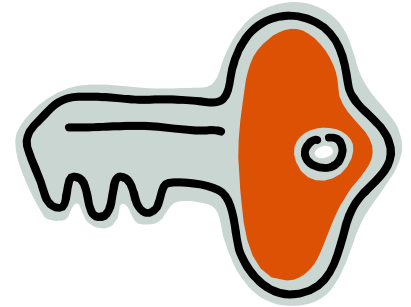


# Defusing Conflict

A D V I S A

## Key Lesson:

**Different approaches to decision making – such as opposite feelings about risk – can be the root cause of conflict.**



# “Real-Life Stories” Headlines

## Leadership Effectiveness

1. When the “Golden Rule” isn’t Good Enough
2. Communicating with Someone who Will Not Listen
3. Getting a “Perfectionist” to Delegate Work
4. Am I Doing a Good Job?



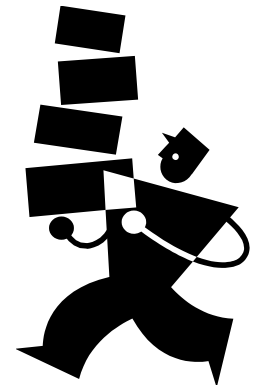
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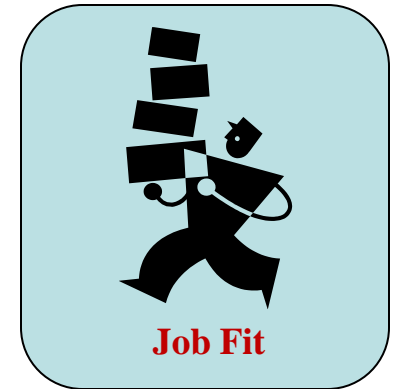


# “Stop Chatting & Get to Work” – Do You Say That Too Much?

A D V I S A

## Scenario:

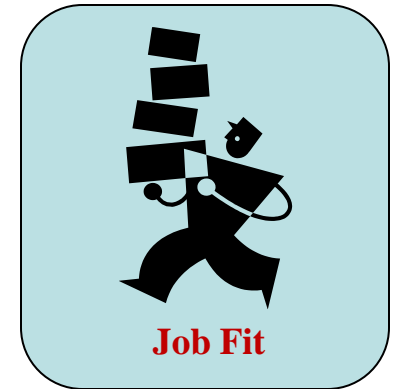
**A manufacturer who ships product to a large number of customers on a daily basis employs a very extroverted person as a shipping specialist.**



# “Stop Chatting & Get to Work” – Do You Say That Too Much?

## The Issue:

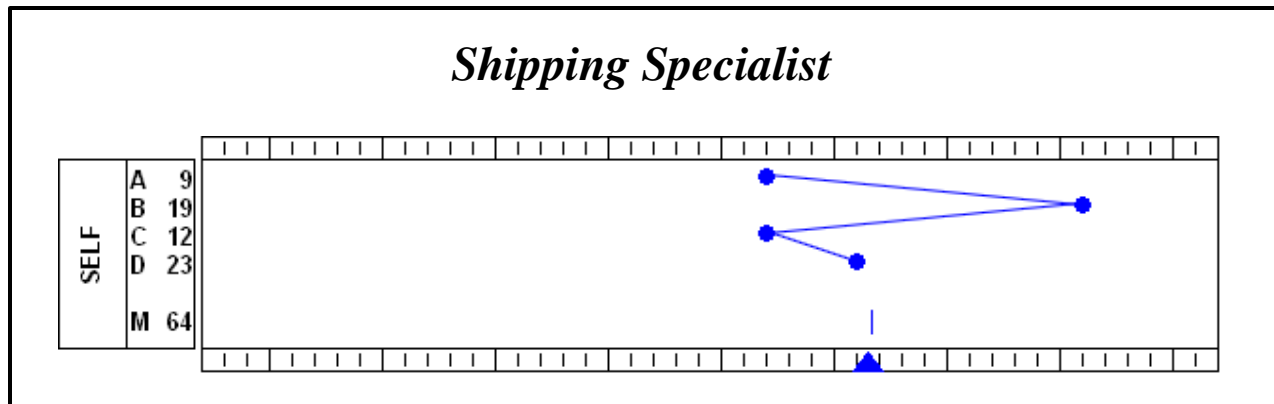
- **The Shipper is very effective at the job but distracts others from their work.**
- **The Shipper walks around talking with everyone about both work-related and non-work-related topics.**
- **The Shipper draws everyone’s attention whenever possible and can create a great deal of drama around any special project – while still getting the job done.**



# “Stop Chatting & Get to Work” – Do You Say That Too Much?

## PI Patterns:

The Predictive Index® Organization Survey (PI) provides objective personality descriptors.



# “Stop Chatting & Get to Work” – Do You Say That Too Much?

A D V I S A

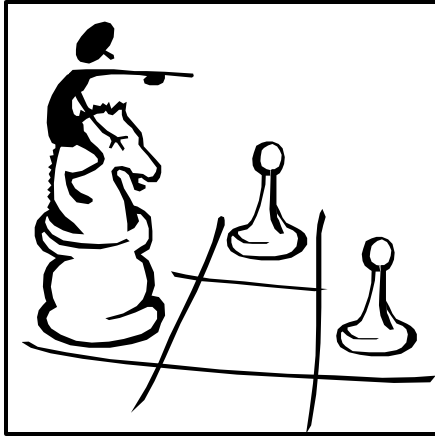


## Analysis:

- **The Shipping Specialist is acting exactly like we'd expect from a very extroverted person.**
- **They need to interact with others and draw the spotlight on themselves.**
- **In addition, the person seems to be able to consistently sustain a high level of activity. Unfortunately, the Shipping Specialist is using that energy to distract others from their work.**

# “Stop Chatting & Get to Work” – Do You Say That Too Much?

A D V I S A



## Recommendations:

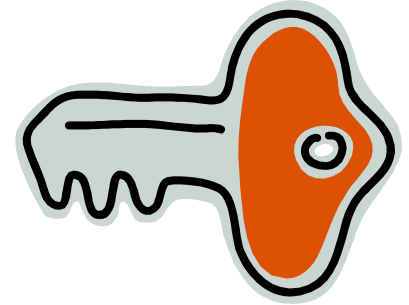
- If a person’s natural behaviors are inconsistent with their job – and this creates a problem – corrective action is necessary.
- To change behaviors of the person in the job you should work with them in a way consistent with their natural motivations.
- For the very extroverted Shipper this means developing a personal working relationship and consistently emphasizing how important it is to **THE RELATIONSHIP** that the shipping job be done quickly but **ALSO QUIETLY!**

# “Stop Chatting & Get to Work” – Do You Say That Too Much?

A D V I S A

## Key Lesson:

Correcting the behaviors of somebody who has a personality mismatch with their job takes time and energy.



# “Real-Life Stories” Headlines

A D V I S A

## Leadership Effectiveness

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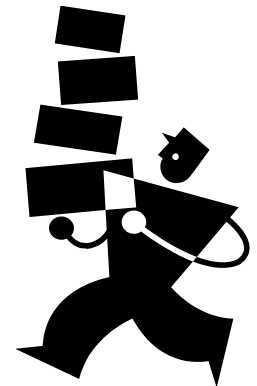
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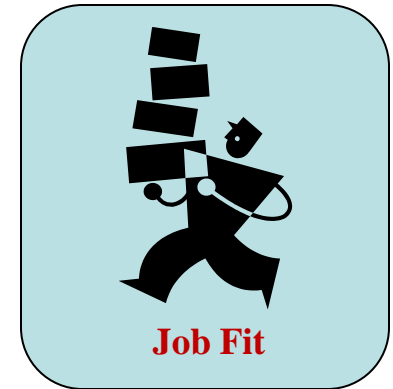


# Knowing Exactly What You Want

A D V I S A

## Scenario:

- A manufacturing company wants to utilize PI's "PRO" system to define the behavioral characteristics of a key position.
- The nature of the job is to be a change-agent driving innovation across the organization.
- The title for the job is "Innovation Leader" and is an individual contributor position with no direct reports.



# Knowing Exactly What You Want

A D V I S A

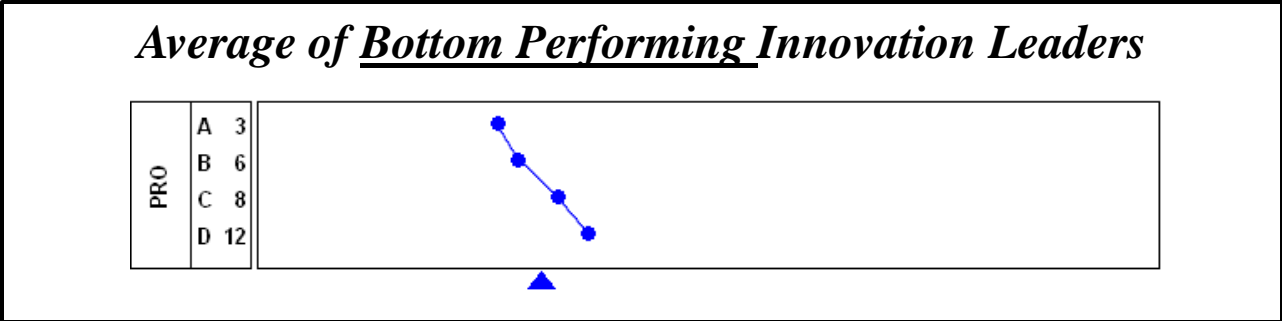
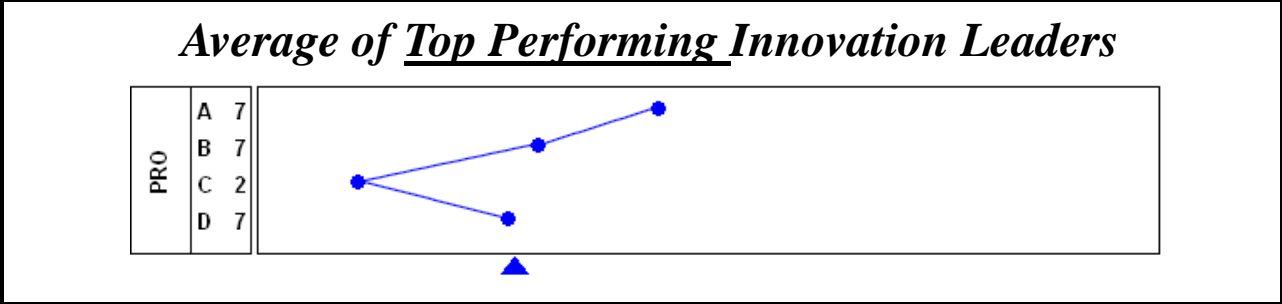
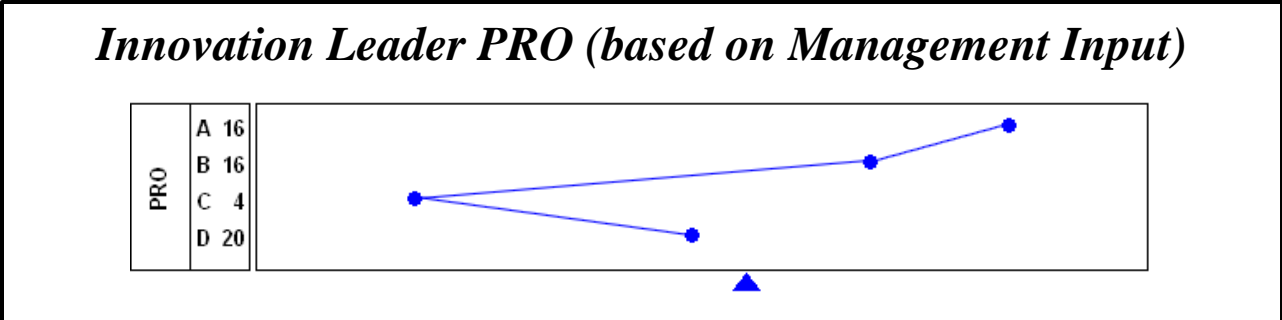
## The Issue:

The company has several incumbents in the position and wants to use their performance data in the job analysis.



# Knowing Exactly What You Want

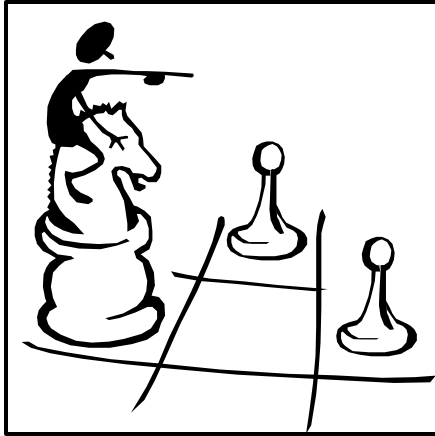
## PRO Patterns – Defining Behaviors Needed in the Job:





## **Analysis:**

- **The PRO has the same pattern as the Top Performers' average PI.**
- **The Bottom Performers' average PI was almost exactly the opposite.**



## Recommendations:

- **The consistency of the PRO with the Top Performing incumbents provides a very high level of confidence that this is the appropriate PI target for this position.**
- **This confidence *increases* because the Bottom Performing incumbents *are not* consistent with the PRO.**
- **This target PRO should be applied to the job with rigorous consistency.**

# Knowing Exactly What You Want

A D V I S A

## Results:

- This analysis clarified the need for career moves for the Bottom Performers to put them in jobs for which they are better suited.
- The company also began to search for current employees with this PI pattern as an initial development step to groom them for the “Innovation Leader” position.

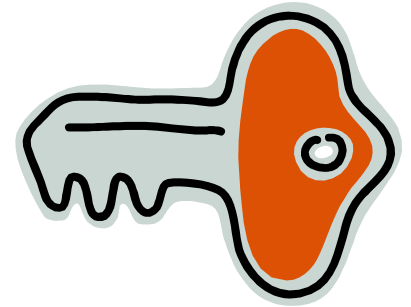


# Knowing Exactly What You Want

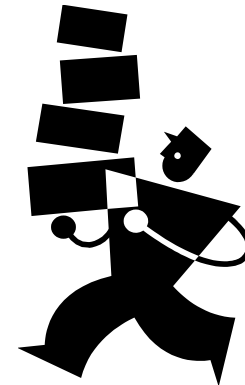
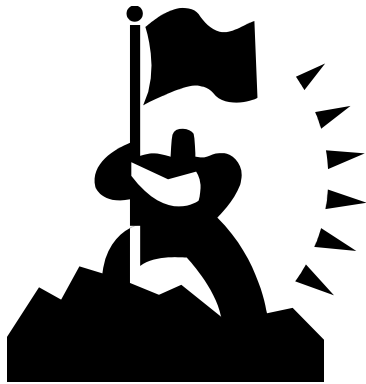
A D V I S A

## Key Lesson:

Use data from incumbent job holders to improve your clarity and confidence in targets for hiring assessments.



# Real-Life Stories about Familiar Leadership Challenges



Paul Dumouchelle  
Management Consultant  
[www.advisausa.com](http://www.advisausa.com)