Why Leadership Assessments FAIL:
the introduction of the IPsP™ Assessment for Financial Leaders

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CPE Credits

Today's webinar is worth 1 Continuing Professional Education (CPE) credit.

To be eligible for CPE credit, you must:

- Answer **at least 3 of the 4** polling questions (during the webinar) and have a total viewing time of **at least 50** minutes.

- Participants will have the opportunity to download their CPE certificate immediately following the webcast if above requirements are met.

- In accordance with the standards for the National Registry of CPE Sponsors, CPE credit will be granted based on a 50-minute hour.

- We are unable to grant CPE credit in cases where technical difficulties preclude eligibility. CPE Program Sponsorship guidelines prohibit us from issuing credit to those not verified by the technology to have satisfied the minimum requirements listed above.

IPSP™ Integral Psychological Profile
WORKSHOP OBJECTIVES

At the conclusion of this WORKSHOP you'll be able to:

➢ Understand the historical background of assessments used in leadership development past, current and future possible and how complexity drives assessment needs;

➢ Know how to identify the (8) universal IPSP™ human competencies;

➢ Make a distinction between aptitude versus application of a leadership, receptivity, creativity, exploration, organization, communication, analysis and adaptability;

➢ Understand the differences in motivation types for the (8) major competencies.

➢ Examine individual competencies and pairs of competencies to better understand an individual's role fit and to help an individual create a personalized developmental plan and preparedness for high stakes situations.

NEEDS

POLLING QUESTION #1:

Does your company use a particular leadership assessment consistently?

1. Yes.
2. No .
3. We have used many assessments.
4. I am unsure.

What are archetypes & where did they come from?

Archetypes are a collectively-inherited unconscious idea, pattern of thought, image, etc., that is universally present in individual psyches
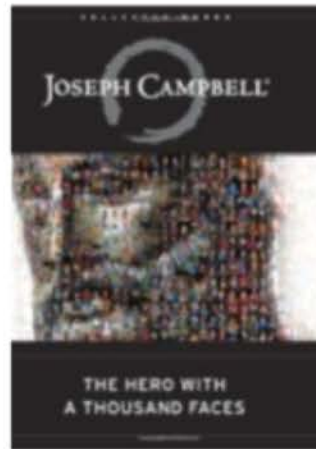
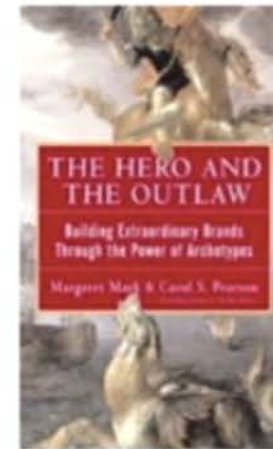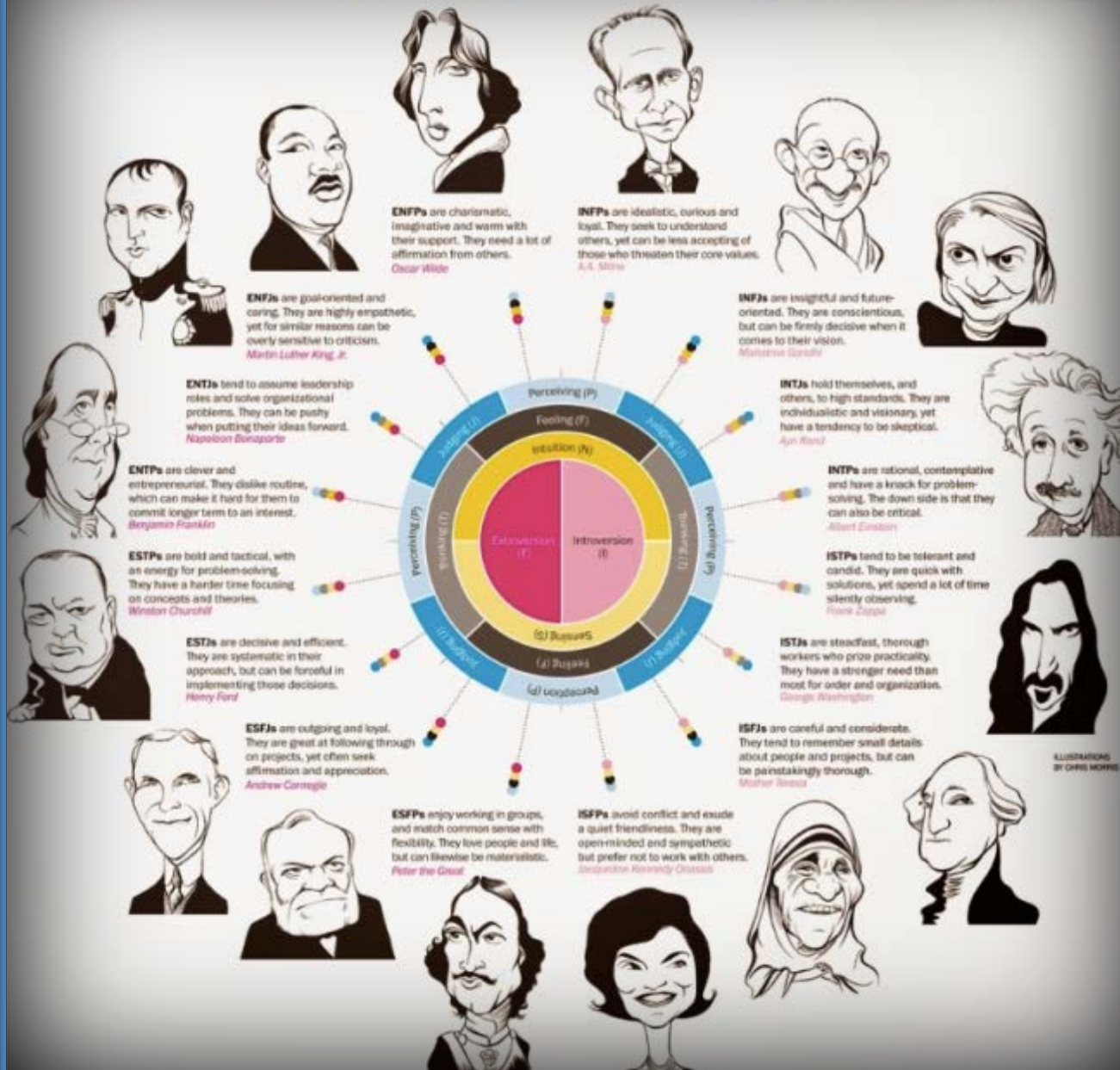| 1919	1949	2001
Carl Jung	**Joseph Campbell**	**Margaret Mark**
Psychologist who introduced the term Archetype in 1919	Demonstrated that the collective unconscious is cross-cultural 1949	Applied Archetypes to Marketing and Branding

To increase energy, those who...
- turn to others are an E (extroversion).
- turn inward are an I (introversion).

Those who take in information in a...
- creative way are an N (intuition).
- pragmatic way are an S (sensing).

When making decisions, those who...
- seek harmony are an F (feeling).
- seek objective truth are a T (thinking).

Those who prefer to...
- get closure and act are a J (judging).
- stay open and adapt are a P (perceiving).

ENFPs are charismatic, imaginative and warm with their support. They need a lot of affirmation from others.
Oscar Wilde

INFPs are idealistic, curious and loyal. They seek to understand others, yet can be less accepting of those who threaten their core values.
A.A. Milne

ENFJs are goal-oriented and caring. They are highly empathetic, yet for similar reasons can be overly sensitive to criticism.
Martin Luther King. Jr.

INFJs are insightful and future-oriented. They are conscientious, but can be firmly decisive when it comes to their vision.
Mahatma Gandhi

ENTJs tend to assume leadership roles and solve organizational problems. They can be pushy when putting their ideas forward.
Napoleon Bonaparte

INTJs hold themselves, and others, to high standards. They are individualistic and visionary, yet have a tendency to be skeptical.
Ayn Rand

ENTPs are clever and entrepreneurial. They dislike routine, which can make it hard for them to commit longer term to an interest.
Benjamin Franklin

INTPs are rational, contemplative and have a knack for problem-solving. The down side is that they can also be critical.
Albert Einstein

ESTPs are bold and tactical, with an energy for problem-solving. They have a harder time focusing on concepts and theories.
Winston Churchill

ISTPs tend to be tolerant and candid. They are quick with solutions, yet spend a lot of time silently observing.
Frank Zappa

ESTJs are decisive and efficient. They are systematic in their approach, but can be forceful in implementing those decisions.
Henry Ford

ISTJs are steadfast, thorough workers who prize practicality. They have a stronger need than most for order and organization.
George Washington

ESFJs are outgoing and loyal. They are great at following through on projects, yet often seek affirmation and appreciation.
Andrew Carnegie

ISFJs are careful and considerate. They tend to remember small details about people and projects, but can be painstakingly thorough.
Mother Teresa

ESFPs enjoy working in groups, and match common sense with flexibility. They love people and life, but can likewise be materialistic.
Peter the Great

ISFPs avoid conflict and exude a quiet friendliness. They are open-minded and sympathetic but prefer not to work with others.
Jacqueline Kennedy Onassis

Perceiving (P)
Feeling (F)
Intuition (N)
Judging (J)
Perceiving (P)
Sensing (S)
Judging (J)
Thinking (T)
Extroversion (E)
Introversion (I)

Perceiving (P)

Feeling (F)

Intuition (N)

Judging (J)

Judging (J)

Perceiving (P)

Perceiving (P)

Thinking (T)

Thinking (T)

Extroversion (E)

Introversion (I)

Sensing (S)

Feeling (F)

Judging (J)

Judging (J)

Perception (P)

...lar reasons can be
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...her King, Jr.

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Mahatma Gandhi

INTJs hold...
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Ayn Rand

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ISTJs are s...
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George Wa...

ISFJs are careful a...
They tend to remem...

Personality type chart *Leah Garaas/MPR*
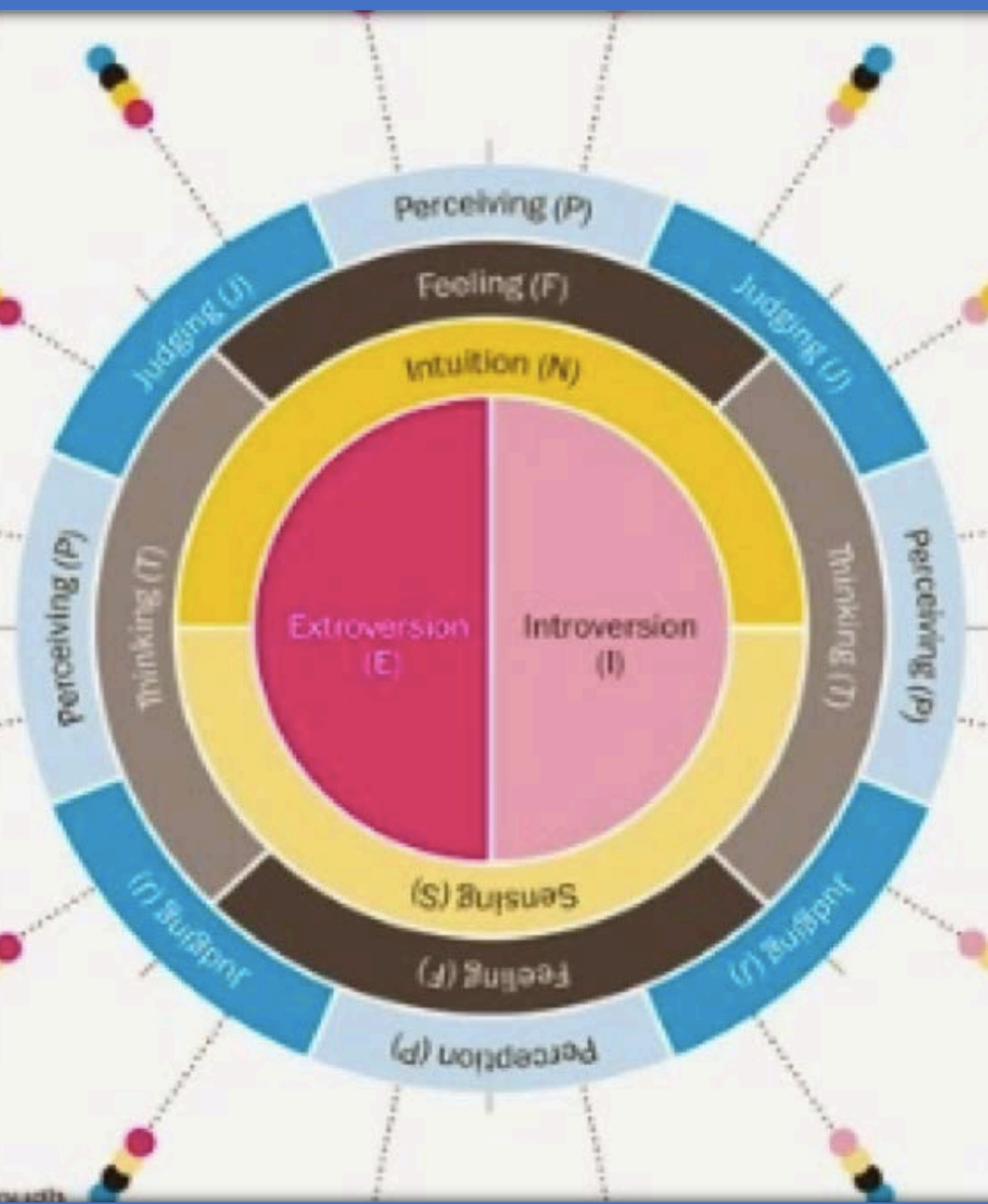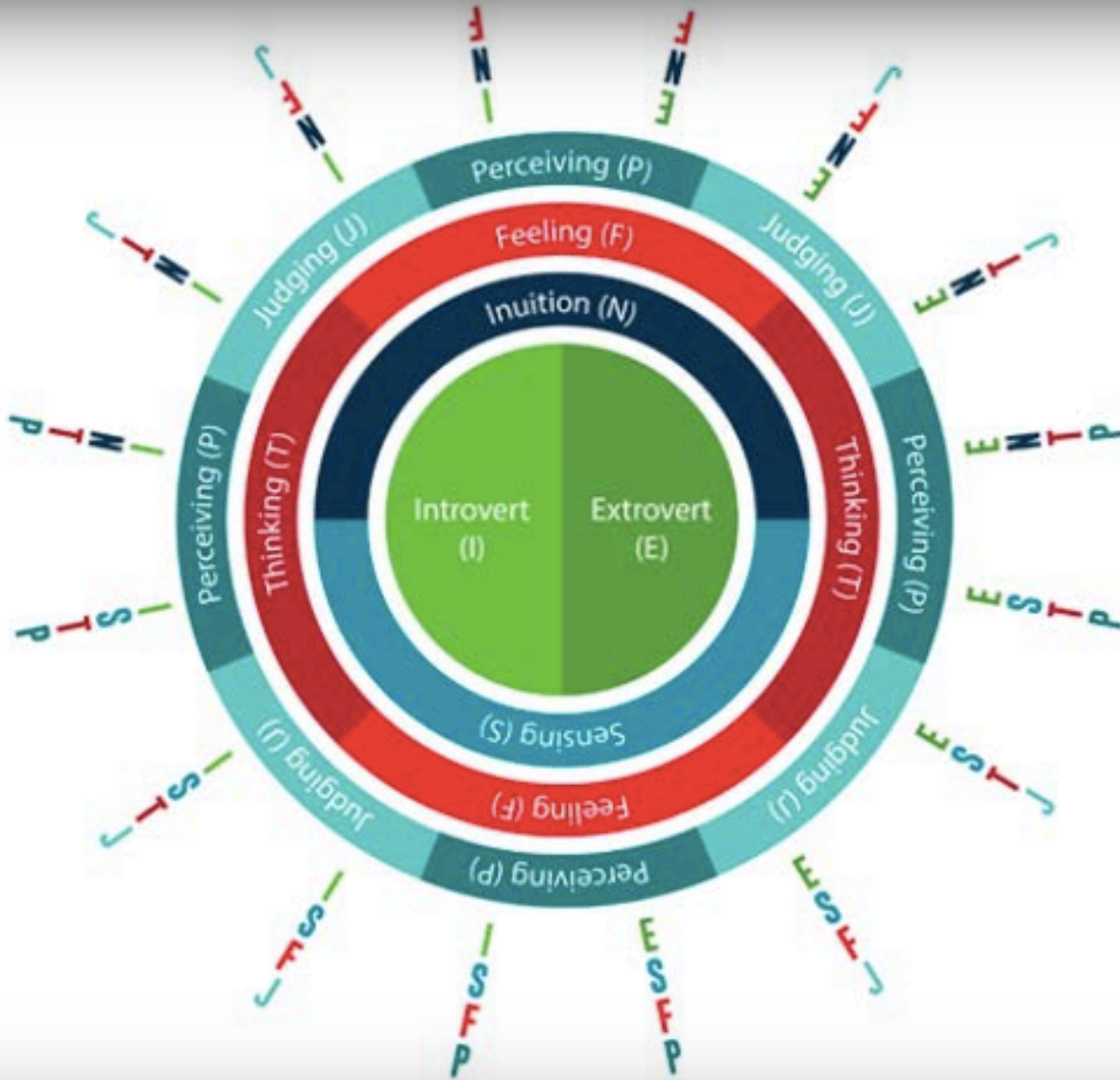
Ecology of the Financial Executive:
The CFO Role as an Illustration:

REALITY

THE TOP THREE REPORTED AREAS

Areas where CFOs focused on nonfinance roles spent the most time, past 12 months

Strategic leadership	46
Organizational transformation	45
Performance management	35

(McKinsey, 2017)

Organization By Division

POLLING QUESTION #2:

Do you think Carl Jung's work is:

1. Interesting
2. Relevant
3. Only partially relevant
4. Interesting and may be relevant

The Human Side of The Enterprise

DOUGLAS McGREGOR

THE HUMAN SIDE OF ENTERPRISE

ANNOTATED EDITION

Updated and with new commentary by
Joel Cutcher-Gershenfeld
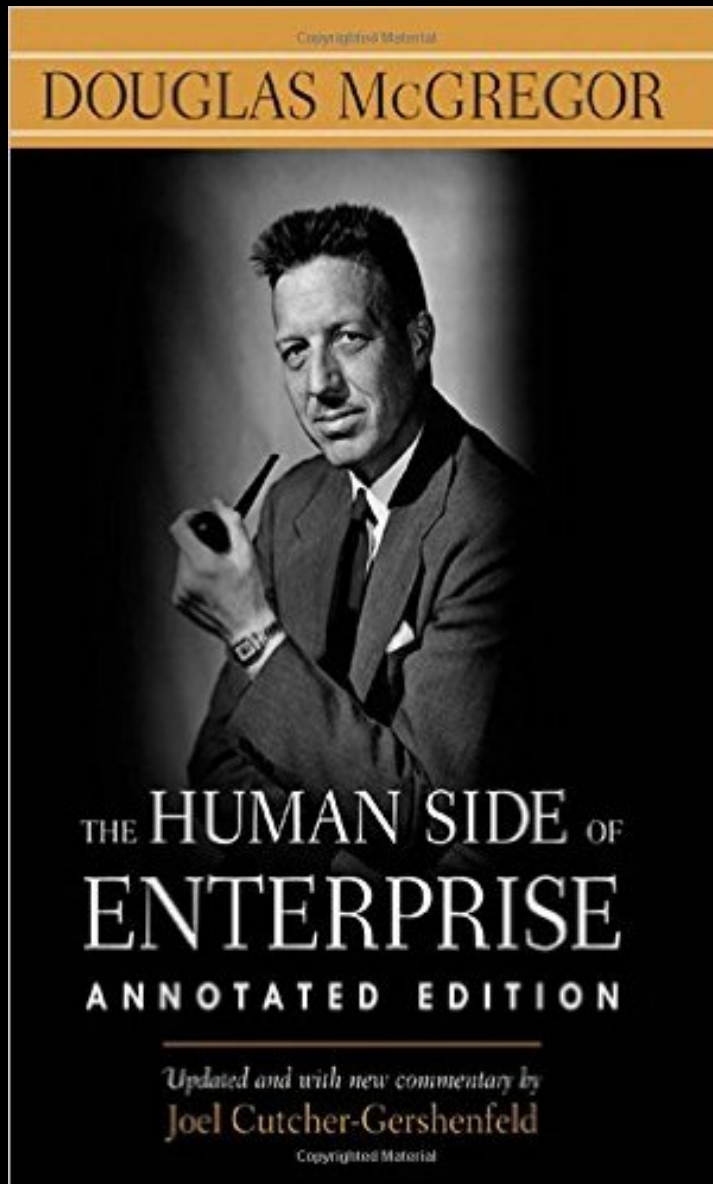
- ✓ Written in the 1960's this book is a manifesto as to what it means to be human and response-able at work today.
- ✓ Today's mid-managers want to express themselves despite the # of years in their current work role (Rebelo, 2017).
- ✓ Today's workers desire qualitatively different outcomes than workers of past generations and the search for meaningful work is central to that shift (Towers Watson, 2014).
- ✓ Adaptability is one of the core responses to handling technical and unexpected changes in the accounting and finance professions (Busila & Rebelo, *in press*).
- ✓ Developing a response that is relationally significant helps move teams into productivity; how to understand what's going on inside of you is the most important first step of any modern leader.

POLLING QUESTION #3

When change happens or is needed to happen in your organization do you find people struggling with ADAPTABILITY?

1. Yes, very frequently.
2. Yes, about 50% of the time.
3. No, everyone likes the challenge of ADAPTING.
4. No, but I sometimes am challenged to ADAPT.

Personhood Traits and Work Type
The Call for Adaptability +

WHAT DO YOU SEE?

The Archetypes

Hero

Courageous

Helps you be brave and act courageously

Jester

Fun

Helps you have a good time

Explorer

Discovery

Helps you experience new things & independence

Ruler

Authority

Helps you exert control

Outlaw

Rebellion

Helps you break the rules

Enchantress

Sensuality

Helps you love and be loved

Innocent

Faith

Helps you feel optimistic

Caregiver

Stability

Helps you care for your loved ones

Magician

Transformation

Transforms the ordinary to extraordinary

Companion

Belonging

Helps you feel connected and understood

Actress

Drama

Helps you feel glamorous and stylish

Sage

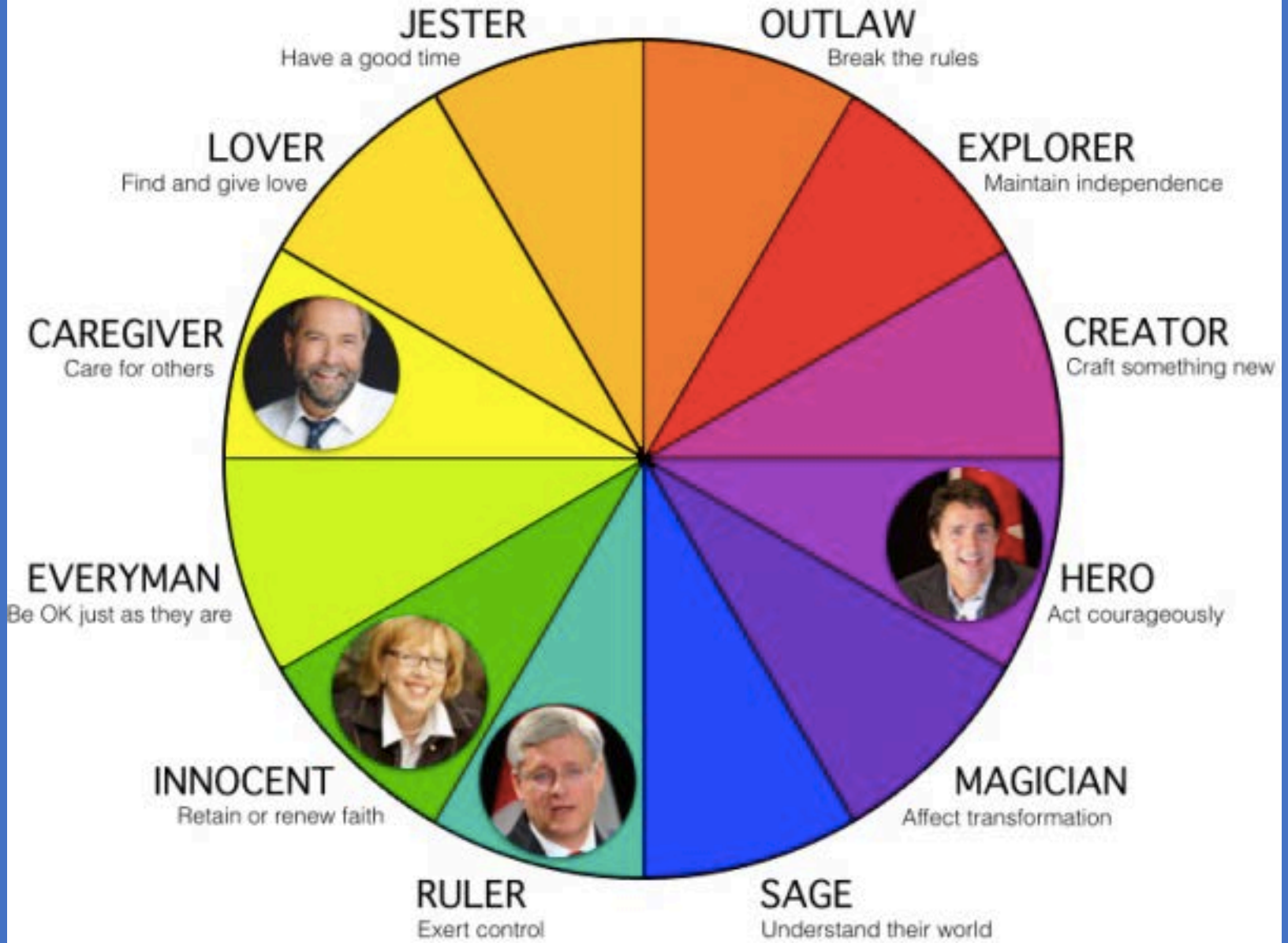**Guidance**

Helps you learn about yourself and the world
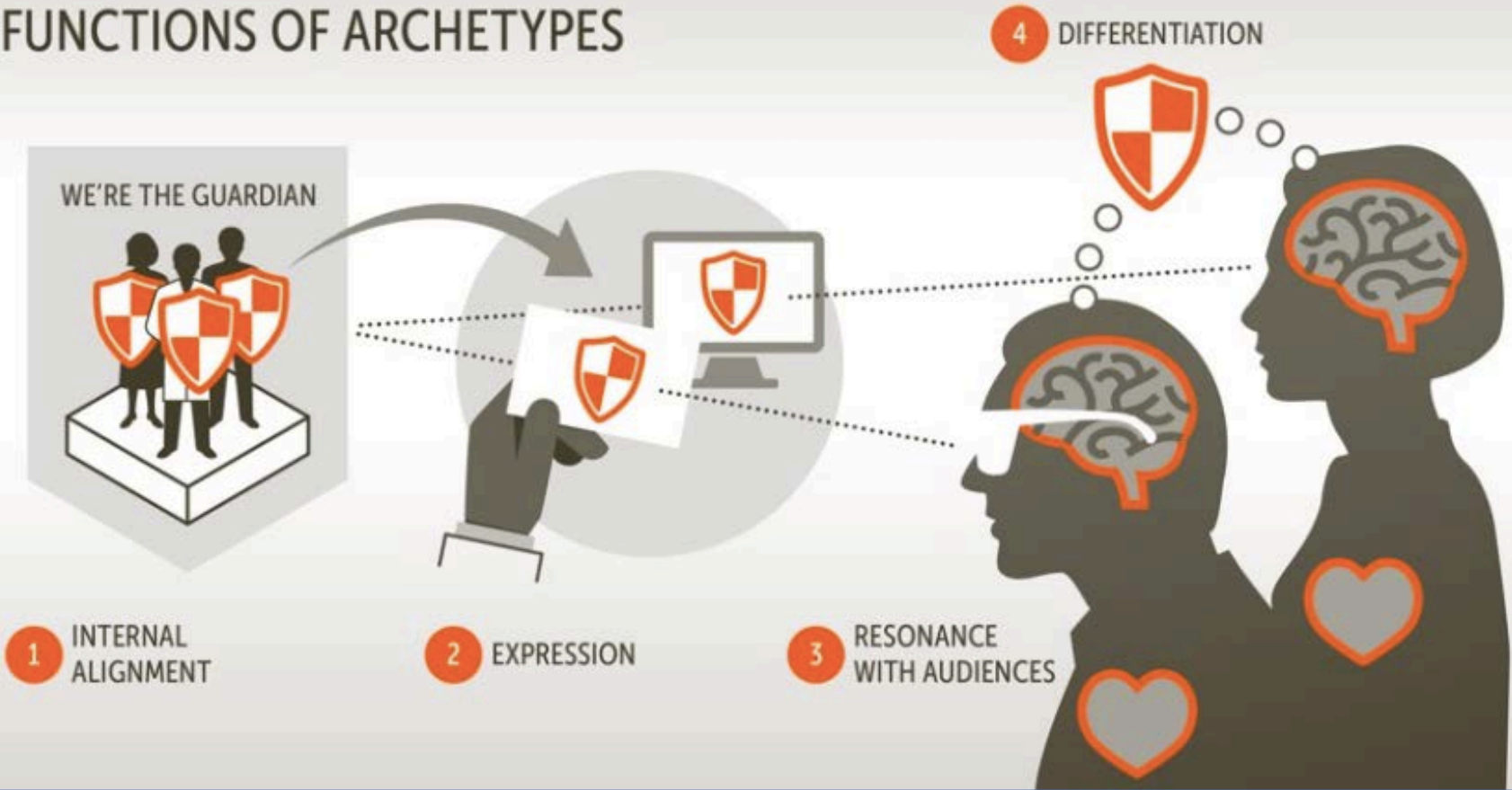
The Eight Archetypes of Leadership

by Manfred F. R. Kets de Vries

- **The strategist: leadership as a game of chess.** These people are good at dealing with developments in the organization's environment. They provide vision, strategic direction and outside-the-box thinking to create new organizational forms and generate future growth.
- **The change-catalyst: leadership as a turnaround activity.** These executives love messy situations. They are masters at re-engineering and creating new organizational "blueprints."
- **The transactor: leadership as deal making.** These executives are great dealmakers. Skilled at identifying and tackling new opportunities, they thrive on negotiations.
- **The builder: leadership as an entrepreneurial activity.** These executives dream of creating something and have the talent and determination to make their dream come true.
- **The innovator: leadership as creative idea generation.** These people are focused on the new. They possess a great capacity to solve extremely difficult problems.
- **The processor: leadership as an exercise in efficiency.** These executives like organizations to be smoothly running, well-oiled machines. They are very effective at setting up the structures and systems needed to support an organization's objectives.
- **The coach: leadership as a form of people development.** These executives know how to get the best out of people, thus creating high performance cultures.
- **The communicator: leadership as stage management.** These executives are great influencers, and have a considerable impact on their surroundings.

Interviewees also noted the following hard and soft skills as important for future finance leaders.

HARD SKILLS / SOFT SKILLS

TECHNOLOGY
Advanced Excel skills
Data mining & analysis
ERP and other accounting and financial software

COMMUNICATION
Written & verbal
Active listening
Public speaking
Communicates difficult concepts and ideas

KNOWLEDGE
Credentials
Certificates
Advanced Degrees

INTERPERSONAL
Navigate office politics
Collaboration & teamwork
Problem resolution
Negotiation
Sales/Customer service

TECHNICAL
Finance skills
Accounting skills
Close process
Infrastructure
STEM skills:
• Science
• Technology
• Engineering
• Math

BUSINESS LITERACY
Critical & strategic thinking
Flexibility
Adaptability
Integrity
Judgment
Grasp nuance quickly
Mitigate potential threats

Engagement and Knowledge Transfer

A Summary of Conflict Prevention Strategies

| Source	Recommendations
Behrens (2009)	Millennials coach older generations on technology
	Company policies/rationale on appropriate dress (e.g. tattoos)
	Flexible work hours
	Continuously challenge Millennials
Preventing Generational Clashes at Your Law Firm (2002)	Understand and communicate generational characteristics
	Provide millennials meaningful work
	Provide millennials constant feedback
Bartley, Ladd & Morris (2007)	Educate each generation about each other's characteristics
	Make mentoring a constant way of leading
	Remain open to different perspectives
Murphy, Gibson & Greenwood (2010)	Training programs should consider learning styles of generations
	Open & ongoing discussion of generation needs
Fink (2010)	Personality assessments can assist in team building
	Teamwork is key to reducing generational conflict

Deyoe, R.H. & Fox, T.L. (2012) Identifying strategies to minimize workplace conflict due to generational differences. The Kucera Companies

In many ways, millennials are behaving just as they might be expected to given the economic circumstances under which they came of age. "The difficulties of managing an age-diverse workforce, with its potential for conflict, are widely accepted. The remedy is understanding more specifically what the different generations want and need. This can help managers design motivation systems, reward and compensation programs, and leadership approaches that recognize their associates' fundamental value structures."[11]

Robert Half Senior Executive Director Paul McDonald, in *Developing Millennials Into Your Firm's Next Generation of Leaders,*[12] highlights what it takes to manage millennials, design their motivation systems, and recognize their values properly. He suggests millennials want "…a job they enjoy and is a source of pride, a manager they respect and can learn from, fair compensation, and the ability to balance their professional and personal lives." (He also discusses how important it is to provide frequent feedback, ongoing and transparent real-time communication, and to give millennials a voice.) McDonald stresses grooming their skills by inserting them into project teams, allowing them to have input into strategy, providing continual learning opportunities, offering advancement opportunities, and explaining how they fit into future succession plans.

[11] Deyoe & Fox, page 10
[12] McDonald, P. (2014). Developing Millennials Into Your Firm's Next Generation of Leaders. financialexecutives.org.
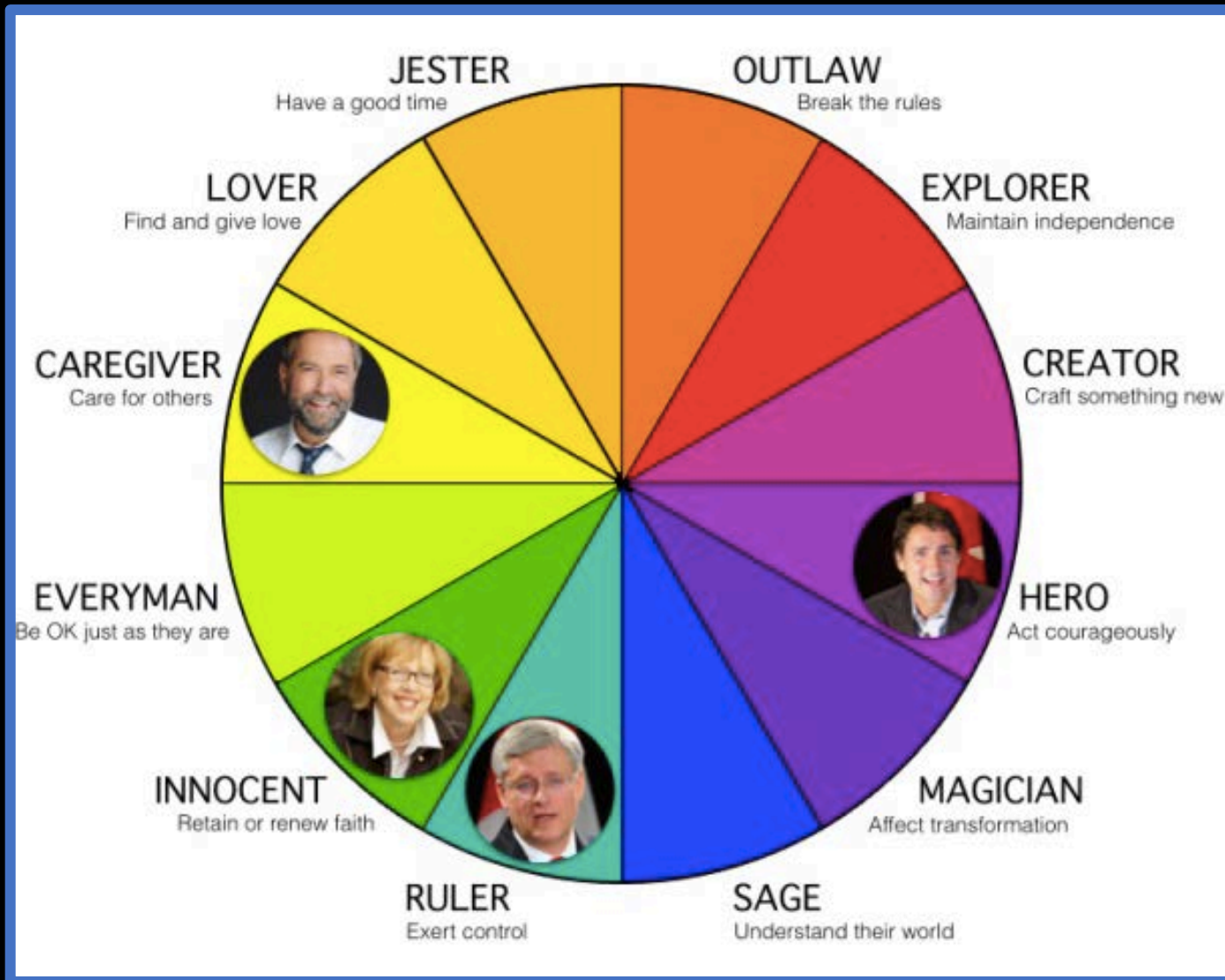
**What are you? How are you this way? What do you do to change?**

From Hierarchy to Holacracy

What is Holacracy?

According to Holacracy.org, Holacracy is a comprehensive practice for structuring, governing, and running an organization. It replaces today's top-down predict-and-control paradigm with a new way of achieving control by distributing power. It is a new "operating system" that instills rapid evolution in the core processes of an organization.

REAL ORGANIZATION CHART

INTEGRATION TRAINING
www.integrationtraining.co.uk
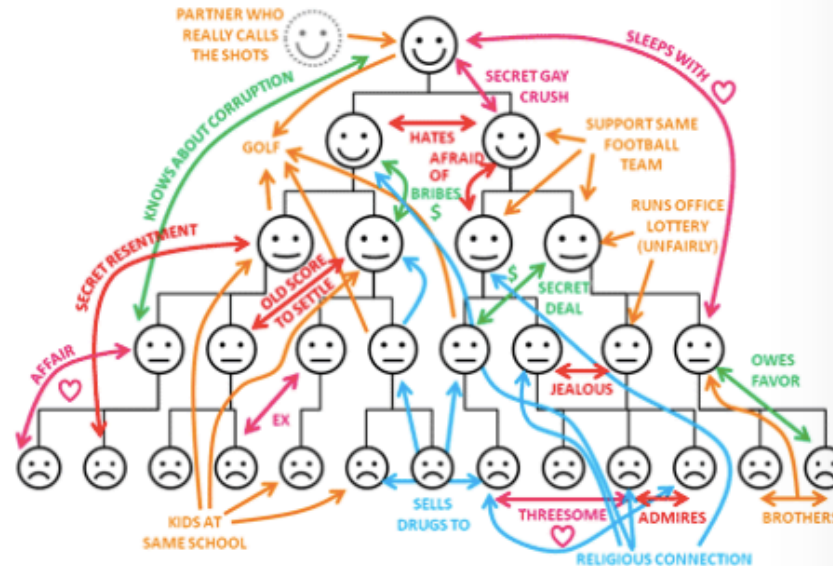
Why Holacracy?

"Research shows that every time the size of a city doubles, innovation or productivity per resident increases by 15 percent. But when companies get bigger, innovation or productivity per employee generally goes down. So we're trying to figure out how to structure Zappos more like a city, and less like a bureaucratic corporation. In a city, people and businesses are self-organizing. We're trying to do the same thing by switching from a normal hierarchical structure to a system called Holacracy, which enables employees to act more like entrepreneurs and self-direct their work instead of reporting to a manager who tells them what to do."

– Tony Hsieh

Zappos Insights

Understanding the IPSP™

The (8) Universal Human Competencies Defined

Competency	Brief Description
Leadership	Capacity to control and influence people and resources
Receptivity	Capacity to be contextually aware, open-minded, sensitive, empathetic; serve others
Adaptability	Capacity to flexibly, suitably respond to changing circumstances, maintain balance
Discrimination	Capacity to perceive distinctions, think critically (analyze, interpret, infer, evaluate, explain)
Organization	Capacity to increase/decrease complexity, form patterns, model or map information
Communication	Capacity to clearly and effectively transmit and interchange thoughts, feelings and information
Exploration	Capacity to get out of one's comfort zone, tolerate ambiguity, take risk, conduct research
Creativity	Capacity to generate new, valuable ideas, products and service

IPSP™ Competencies

➢ Each has an opposite

➢ The opposite is complimentary

➢ They map to each other

➢ There are 13.4M+ variations

➢ *Free Will* is your trigger

➢ Balance happens with focus

➢ Each can be developed

Understanding the IPSP™: making vital distinctions

Aptitude

- Absorption
- Accumulated Potential
- Understanding of
- Interest in

Application

- Release
- Action distributed
- Implementation of
- Engagement with

Understanding Motivational Orientations of Your (8) Core Competencies

Reactive

- Waits for opportunity
- Cautious
- Requires an external stimulus to act
- Has to have a good reason

Proactive

- Creates opportunity
- Risk-taker
- Requires an internal stimulus to act
- Passion
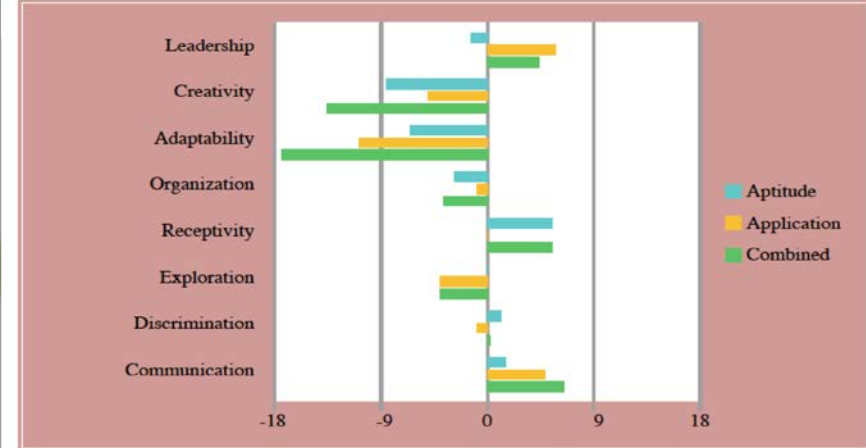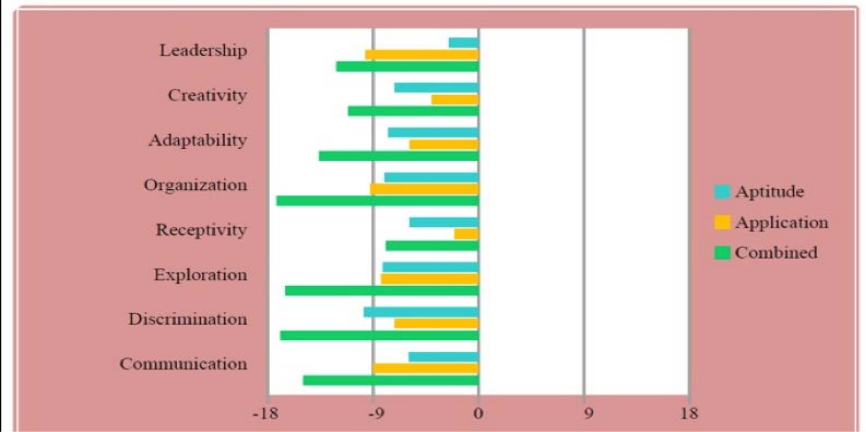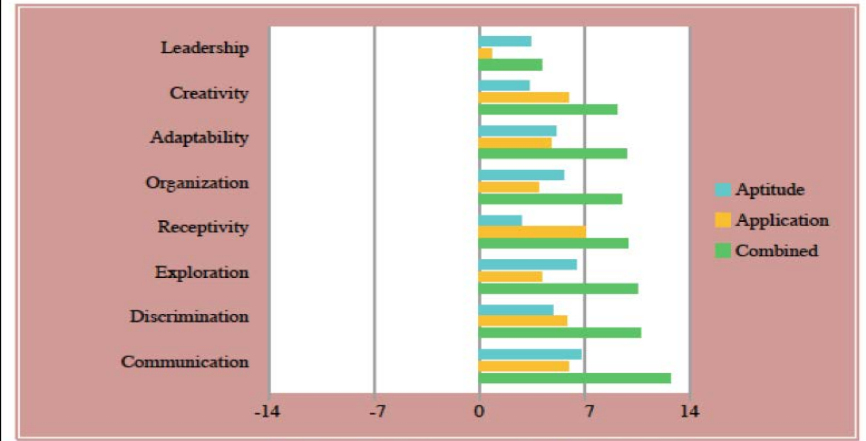
Competency Spotting

Linda Zukauckas
"The Human Side of the
Enterprise"

Leslie Seidman
"Values Driven Leadership"

Andrej Suskavcevic
"The Resonant Leader"

LEADERSHIP

EXPLORATION

ADAPTABILITY

ORGANIZATION

RECEPTIVITY

CREATIVITY

DISCRIMINATION
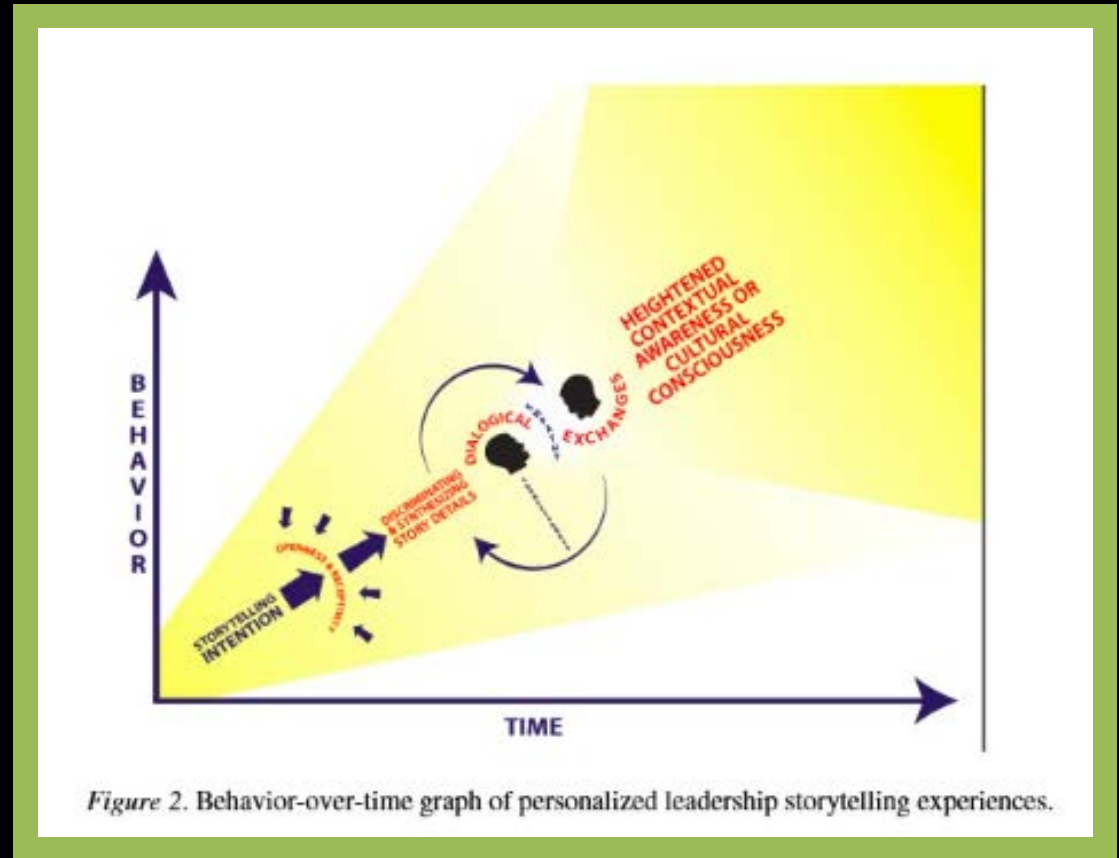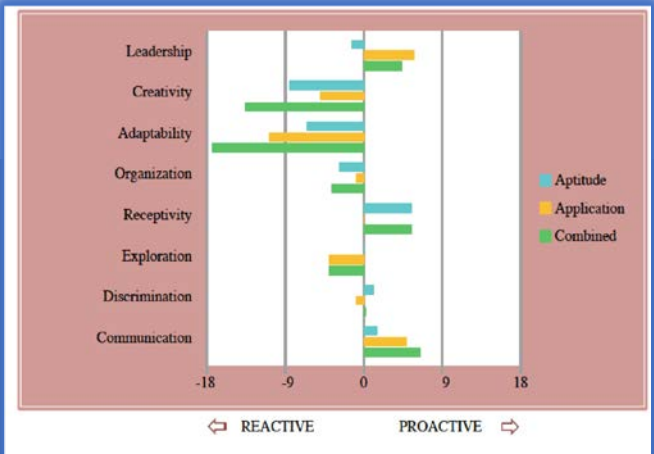
COMMUNICATION

Reactive
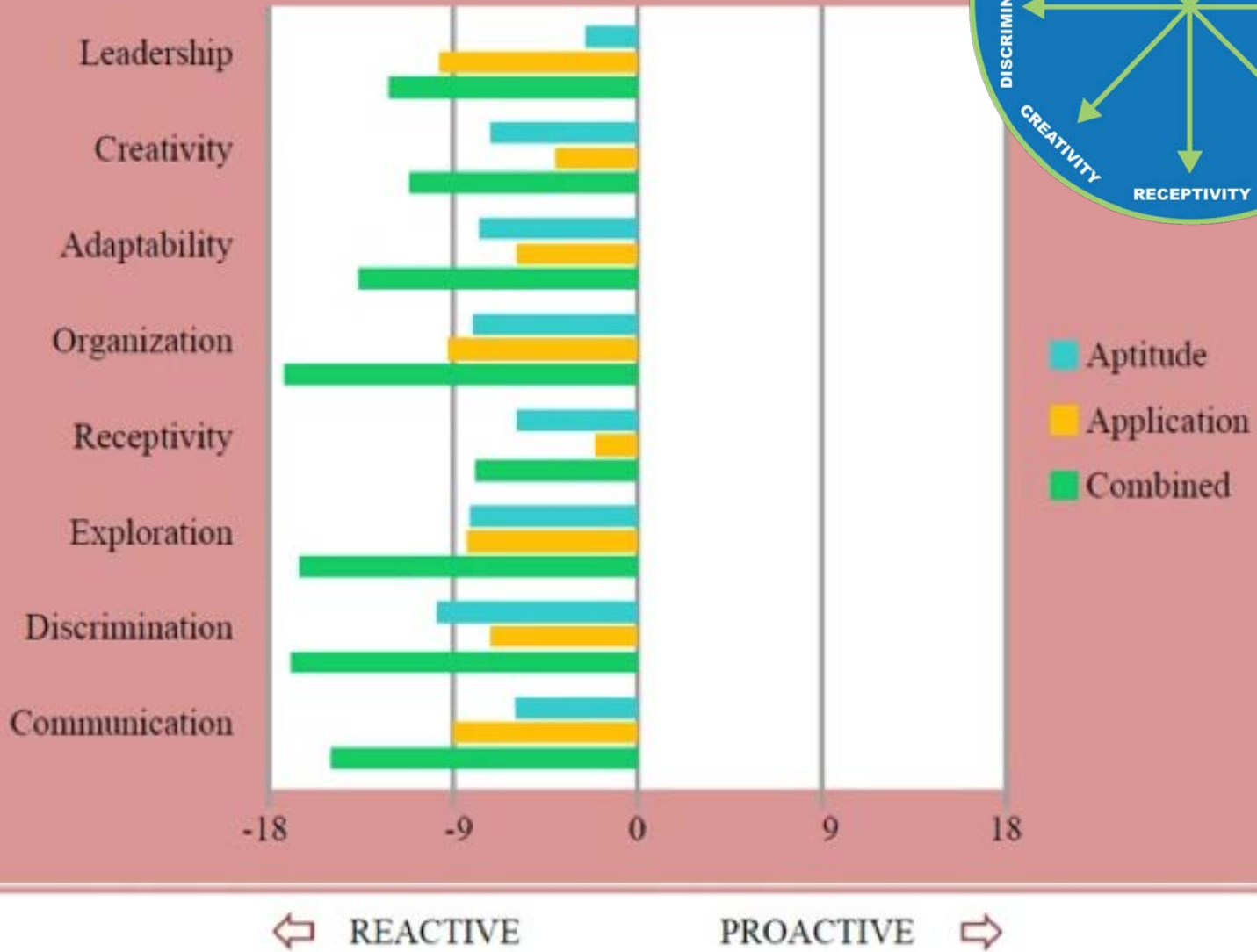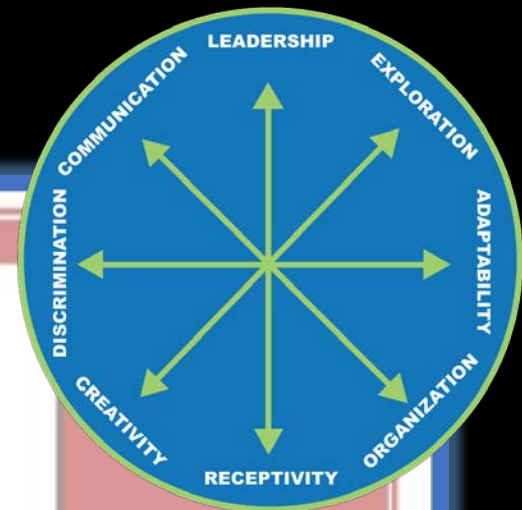
Proactive
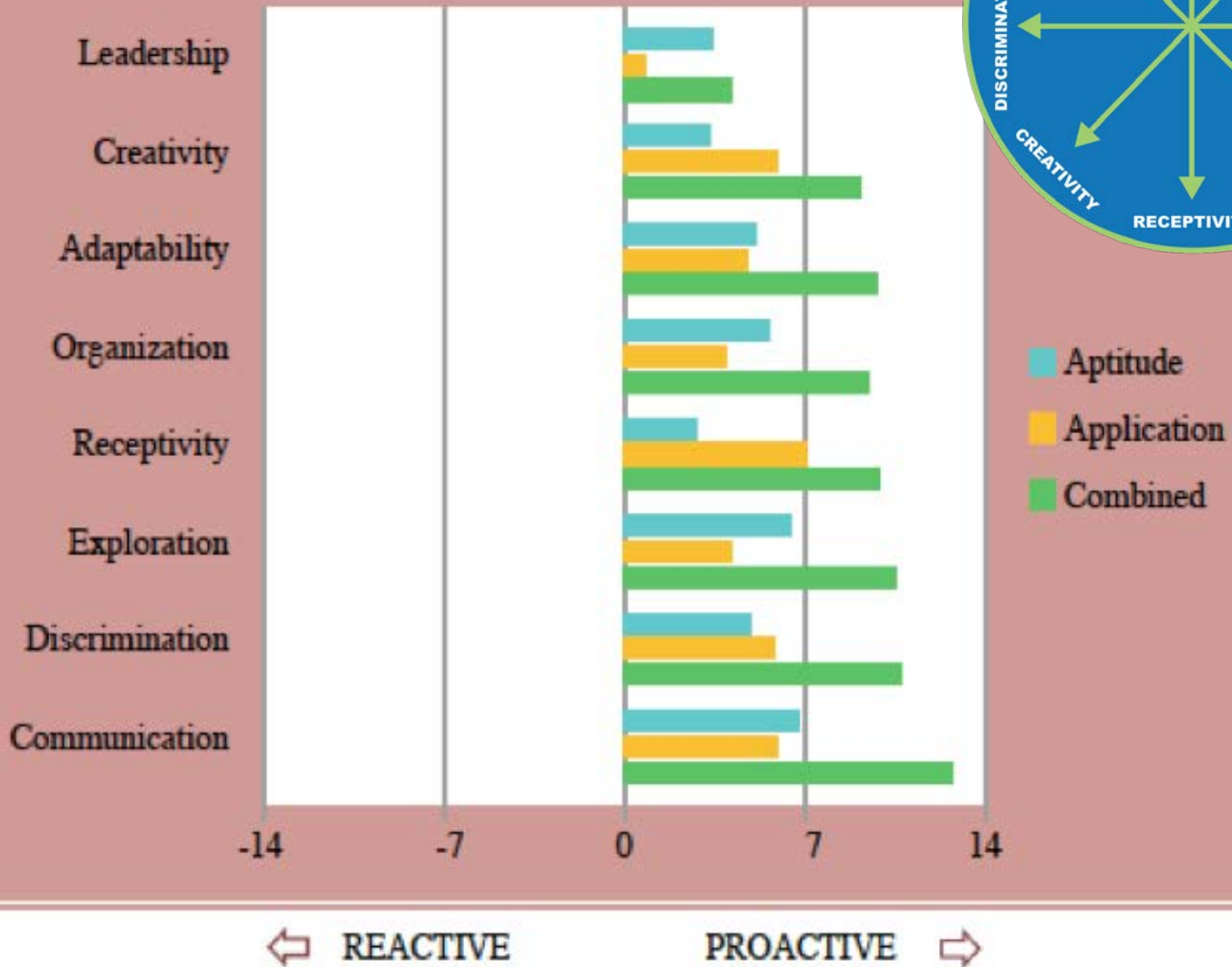
Polarized
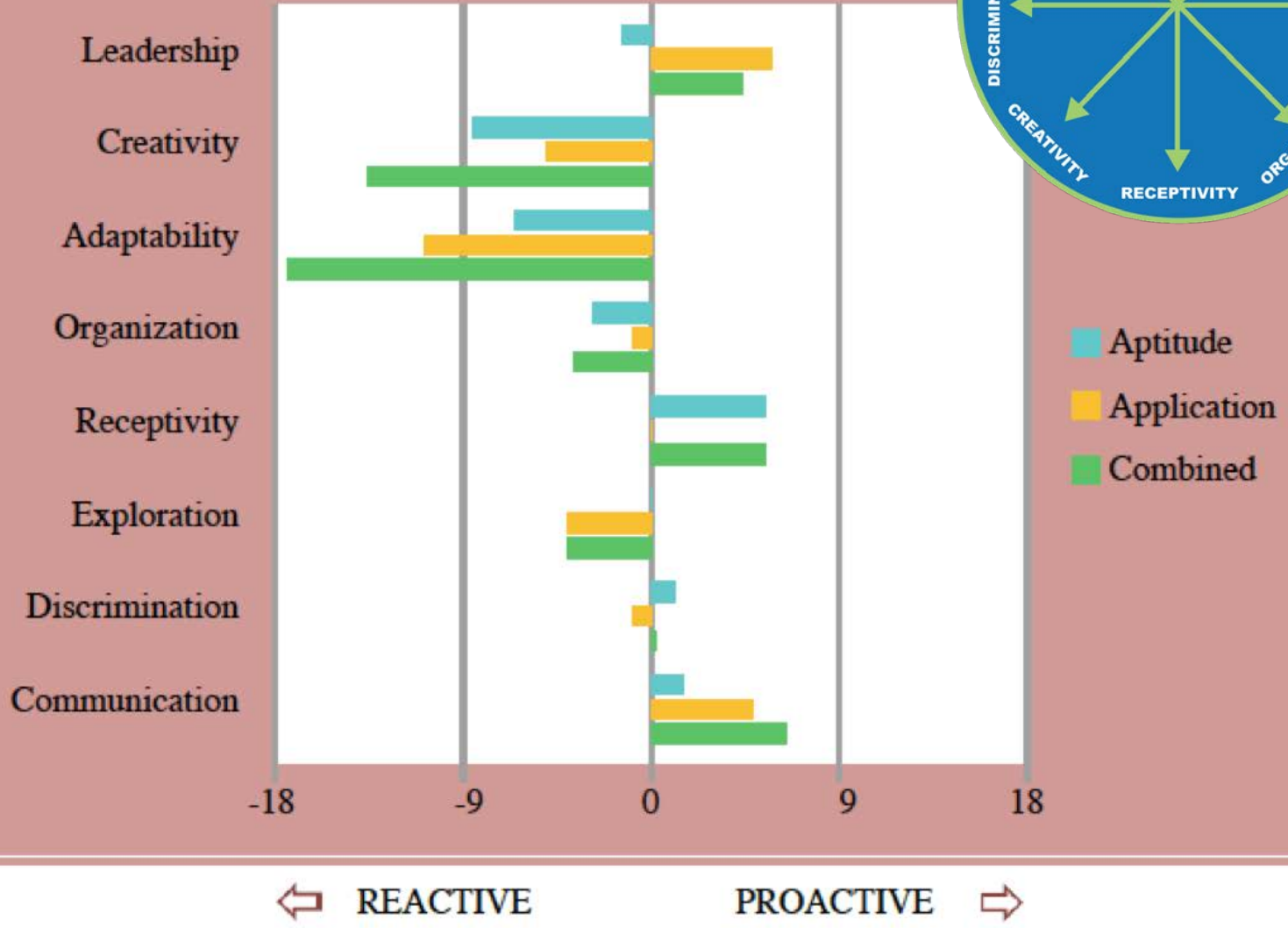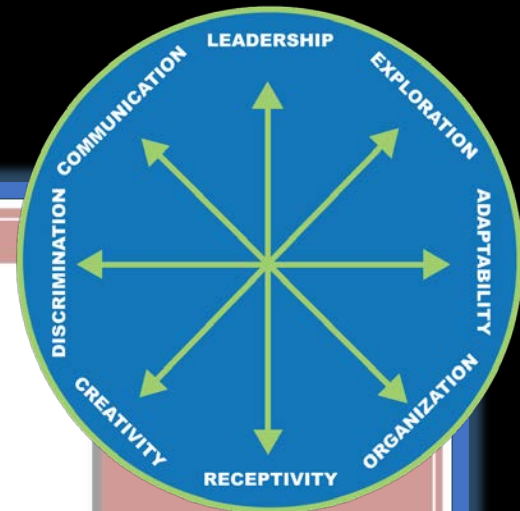
Figure 2. Behavior-over-time graph of personalized leadership storytelling experiences.

Accessing Technical Thinking for Personal Responsiveness

To identify Skills:

1. Look at your **past history** for each of your Practices and record the Skills that you used at that time to do that Practice.
2. Look at your description of each **present** Practice and record the Skills you are using now.
3. Look at your **future possibility** for each Practice and record the Skills you hope to use in the future.

Here are some examples of Skills:

reading sheet music	sculpture making	following directions
giving people advice	communication skills	cooking
language skills	fixing skateboards	app development
project management	creating exercise routines	listening skills
time management	collaborating	drawing
research skills	coaching skills	mentoring
business skills	software skills	study skills
raising bees	analytics	mathematical skills
tending horses	cooking	tying flies
leading my friends	technology skills	trail riding

Enter Your Skills Below:

|	Past History	Present	Potential Future
Skills: Things you know how to do			

Group Primary Chart
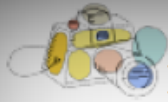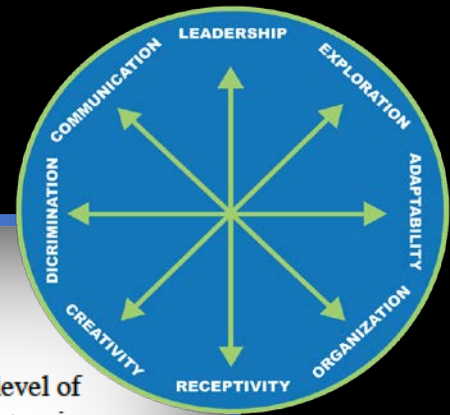
INTERPRETING YOUR PRIMARY CHART

Your Primary Chart (below) is the basis for all the other charts in this report. It depicts your level of proactivity and reactivity in terms of aptitude for, and application of, the eight (8) core competencies: **LEADERSHIP, CREATIVITY, ADAPTABILITY, ORGANIZATION, RECEPTIVITY, EXPLORATION, DISCRIMINATION and COMMUNICATION**.
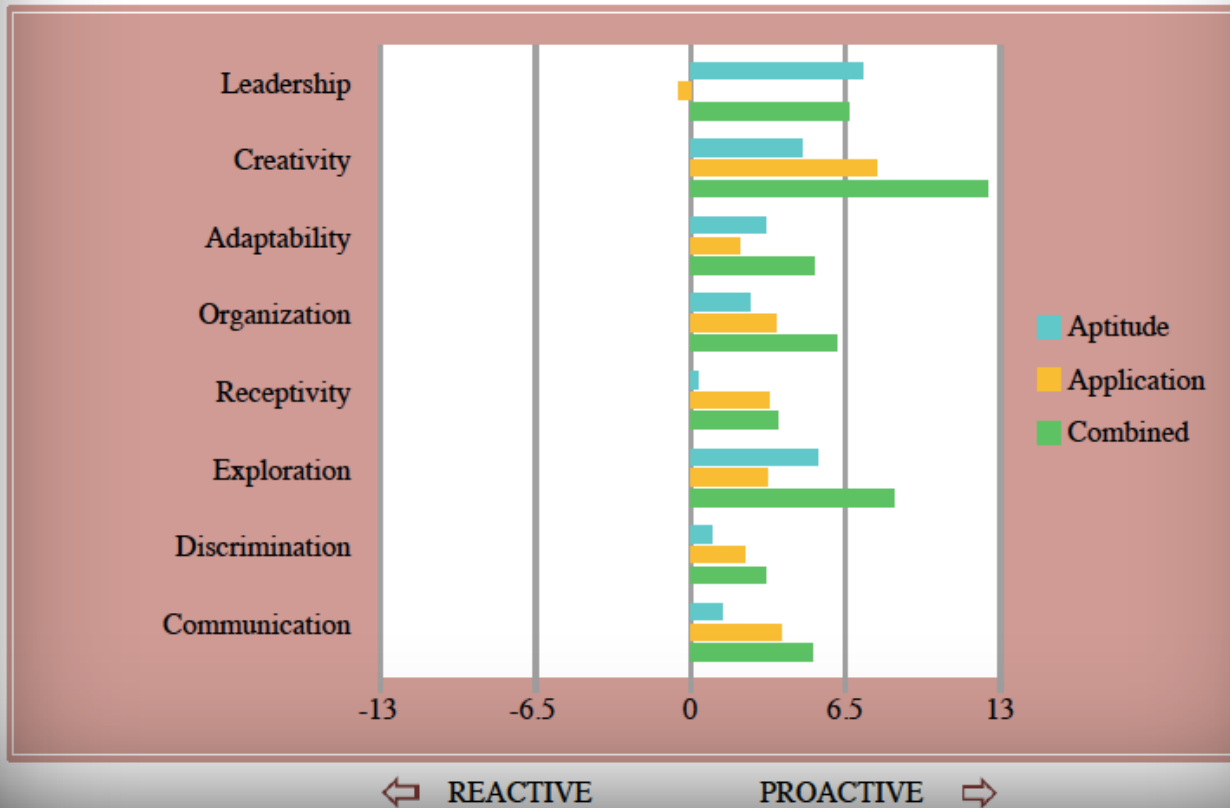
POLLING QUESTION #4:

After reviewing the IPSP™ Competencies, do you find the ability to know the difference between the competencies helpful?

1. Yes I found learning about a few of these competencies and how they might be helpful to me and my team.
2. Yes, I'd like to learn more about how this assessment may work into our team's developmental plan.
3. No. I think I've been well-served our current assessment(s) and appreciated the added learning opportunity about the IPSP™ Integral Psychological Profile Assessment.
4. I found it helpful but need more information; I have questions and would like some added resource materials.

Group Secondary Chart

YOUR 8 SECONDARY CHARTS TOP SCORES

YOUR Combined TOP Scores

	TOP 1st	TOP 2nd	TOP 3rd
PROACTIVE	Creativity - Exploration ------------------- **Inventor - Visionary**	Leadership - Creativity ------------------- **Creative Entrepreneur - Inspirational**	Leadership - Exploration ------------------- **Pioneer - Questor**
REACTIVE	Receptivity - Discrimination ------------------- **Observer - Objective Thinker**	Discrimination - Communication ------------------- **Reporter - Critic**	Receptivity - Communication ------------------- **Counselor - Pedagogue**

YOUR Aptitude TOP Scores

	TOP 1st	TOP 2nd	TOP 3rd
PROACTIVE	Leadership - Exploration ------------------- **Pioneer - Questor**	Leadership - Creativity ------------------- **Creative Entrepreneur - Inspirational**	Creativity - Exploration ------------------- **Inventor - Visionary**
REACTIVE	Receptivity - Discrimination ------------------- **Observer - Objective Thinker**	Receptivity - Communication ------------------- **Counselor - Pedagogue**	Discrimination - Communication ------------------- **Reporter - Critic**

YOUR Application TOP Scores

	TOP 1st	TOP 2nd	TOP 3rd
PROACTIVE	Creativity - Communication ------------------- **Author - Entertainer**	Creativity - Organization ------------------- **Arranger - Catalyst**	Organization - Communication ------------------- **Manager - Mobiliser**
REACTIVE	Leadership - Adaptability ------------------- **Politician/Ambassador - Strategist**	Leadership - Discrimination ------------------- **Helmsman/Director - Result-Oriented**	Adaptability - Discrimination ------------------- **Practitioner/Professional - Administrator/Conservator**
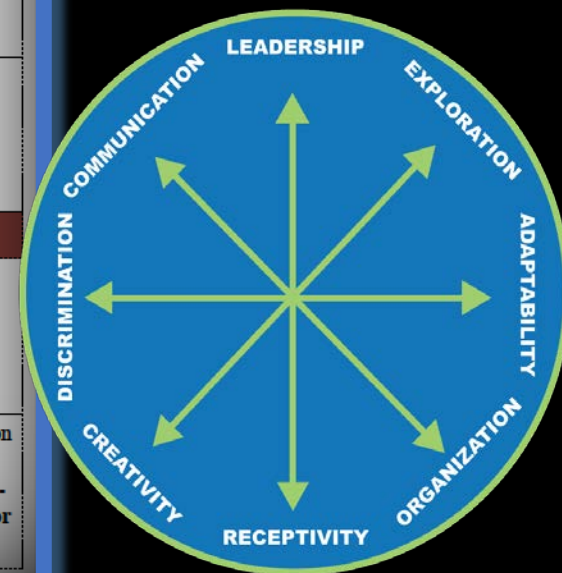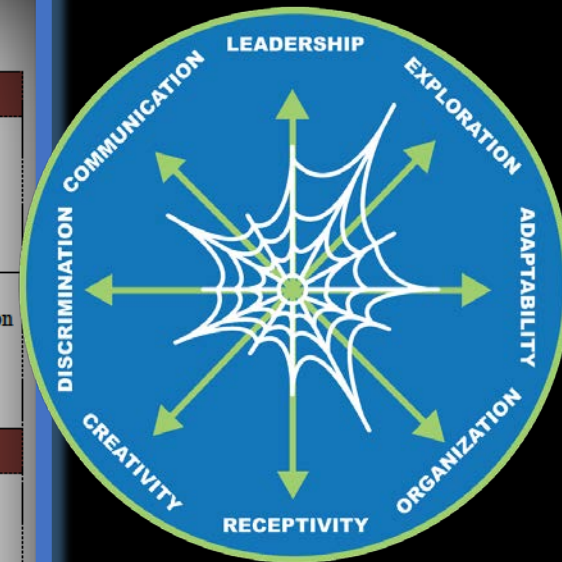
Sample Company Group: Areas to Develop & Balance

Achiever Producer (LDR/ORG)

- Focuses on continued personal development supported by the ability to organize yourself. Assesses, organizes and controls resources then harnesses them to produce something of value.

  - Planning
  - Purpose
  - Setting Priorities
  - Delegating and Monitoring

Areas to Develop & Balance

Pragmatic Developer (ADP/ORG)

- Concerned with practical matters, has a keen sense of utility and extracts and enhances the possibilities of things. Systematically brings something into a more advanced or effective state.

- Ability to respond systematically
- Internal and external balance
- Self-correction
- Appropriate re-organization

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