

AMI Integrator-Visionary Study

May 9, 2016

SUMMARY:

Strategic Talent Management (STM), in partnership with Drew and the Agency Management Institute (AMI), conducted a study of your highly valued “#2’s” (Integrators). The prime objective was to build a “benchmark” to which you can hire future Integrators—this report is to announce that we now have an accurate benchmark for agency Integrators. When you are ready to hire an Integrator, STM can help assure you hire the very best person for this important role.



STM has used this technique successfully since 2002 to help agency owners select thousands of effective new employees for various roles. We developed benchmarks for key agency roles in 2003, updated those over the years, and have applied that information along with agency specific information to select top candidates. In a 2014 survey of 38 customers, 100% felt that the STM assessment process yielded more knowledge about a new hire than compared to before working with STM [25% “somewhat more knowledge”, 50% “significantly more knowledge”, and 25% “a very high degree of knowledge”].

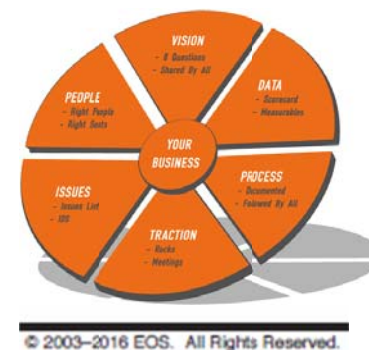
For this study, we assessed 10 owners (Visionaries) and 14 Integrators using the same assessments we use for hiring, promotion and succession planning. This study is designed to distill what is unique about AMI Integrators & Visionaries, and apply that information in the practical world of selecting and hiring this important class of employee. This benchmark

can be used to greatly speed up the process of identifying and selecting the *right* Integrator who fits with the Visionary, and the company he or she has built over many years.

According to Gino Wickman, author of Traction and Rocket Fuel:

- A typical Visionary has most of the following characteristics: *He or she tends to be the founding entrepreneur, is a great leader, has lots of ideas, is a big-picture thinker, is a relationship person, is a creative problem solver, is a great salesperson, and is a grower and builder.* Unfortunately, he or she also creates chaos, has no patience for details, has ADD, gets distracted by shiny stuff, and wants to implement every single one of his or her ideas right now (that's why the Integrator is so important)
- A typical Integrator has most of the following characteristics: *He or she is a great executor, is a great manager, is good at holding people accountable, and creates consistency and prioritization; he or she harmoniously integrates the leadership team.* He or she unfortunately has to say no a lot, is accused of being a pessimist and is typically the bearer of bad news in the organization.

(from EOSworldwide.com blog 4.28.2015, emphasis mine)



These definitions are perfectly reflected among the 10 owners and 14 Integrators we assessed for AMI. In this report, I will show you how this played out “in the real world” with actual Integrators & Visionaries, and how to improve in the following areas:

- **Attracting Integrators.**
- **Interviewing Integrator Candidates for Hire.**
- **Managing and Developing Integrators.**
- **Communicating with, and Retaining Integrators.**
- **Succession and Business Continuity.**

Some background information, especially for those of you who are not familiar with our assessment process.

ASSESSMENTS:

The “iceberg” model (next page) is a good analogy for the three core and six specific assessments we used to look at each individual in this group. As you may recall from grade school earth science classes, only 10% of an iceberg floats above the surface of the ocean. You have to do a “deep dive” to begin to understand what the iceberg is really all about.

Our **Behavior** assessment corresponds to the peak of the iceberg—*Behavior is the visible tangible way that the individual carries themselves in the world and to which the rest of us respond. Behavior is about perception.* It has significant implications for communication and management style, but is not predictive of success in a position.

Motivators show up below the water line on our iceberg model and provide information about *why one does what they do.* Motivators are key to understanding the role for which an individual is best suited, and when you look at this group, you will see the subtle factors that distinguish ‘Visionaries’ and ‘Integrators’.

At the base of our iceberg model is our **Competency** assessment. *This yields more detailed information about an individual's Attitudes, Energy & Drive.* This is differentiating information when it comes to understanding how a person fits in with your team and drives success.

This report presents each assessment and attempts to provide a “30,000 foot” view of the Integrator/Visionary relationship. This can be the basis of our work with you going forward in terms of predicting a candidate’s “soft” skill competency to perform as an Integrator and fully meet your expectations.





Behaviors
How one is perceived to perform (Communication Style)
 Behaviors are visible and observable. They are not about us so much as how we are perceived by others. We are judged by how we communicate and interact with others.

Motivators
Why one performs (World-View)
 Motivators shape Behaviors. They show how we determine the importance of people and things around us and what spurs us to action.

Competency
Will one perform (Capacity, Attitudes, Energy and Drive)
 Competency shapes both our Behaviors and Motivators. It informs how we think about the world around us and ourselves. Competency includes attitudes, beliefs, energy and drive.

Attributes
Predict performance (Common Business Success Factors)
 Attributes are specific factors common in business and organizational life that speak to our predicted performance.

Behavior (see charts on pages 12-13)

Behaviorally, a successful employee can be from a wide range of styles as evidenced by the wide range of the natural styles (blue dots) of the Integrators. One of the significant differences between Visionaries and Integrators are that Visionaries tend to be universally extroverted (outgoing, overtly friendly and results focused) in their natural styles. As Wickham states, this style is good at creating *chaos, has no patience for details, has ADD, gets distracted by shiny stuff, and wants to implement*



every single one of his or her ideas right now, and they can usually convince people to do it!

There is a *clear* difference between the two groups in their adaptation to work (red dots). Visionaries have learned that to be successful they need to be both friendly and results oriented—in order to sell and communicate their vision for their agencies and where they are going. The Integrators have learned to be task *masters*. About 25% of the Integrators adapt to an introverted, analytical and quality focused style—that may not be as good a communicator as the Visionary style. The balance adapt a “dominant” extroverted style that in some cases is balanced like their Visionary counterparts, but in many cases are more driven, directed and, as Wickham points out, because *he or she unfortunately has to say no a lot, is accused of being a pessimist and is typically the bearer of bad news in the organization.*

Motivators (see charts on pages 14-15)

Motivationally, a successful employee will tend to have a predictable set of motivators (world-views) that correlate to their position, and echo the strongest world-views of the owner(s) or senior management team. It is clear, when you look at these charts, that the Visionaries and Integrators share a core world-view and are motivated in nearly identical ways—this is to be expected because the owners (Visionaries) hand-picked the Integrators and have worked with them long enough to know they have a wonderful “#2” in their agency. *But*, there are subtle differences that can help identify potential Integrators from those who might themselves be better suited as a Visionary or some other role.



▼ Business Motivators	Strongly Held by Visionaries	Strongly Held by Integrators
Knowledge & Discovery	50% ↑	79% ↓
Leadership	60% ↑	57% ↓
Return on Investment (ROI)	80% ↑	57% ↓

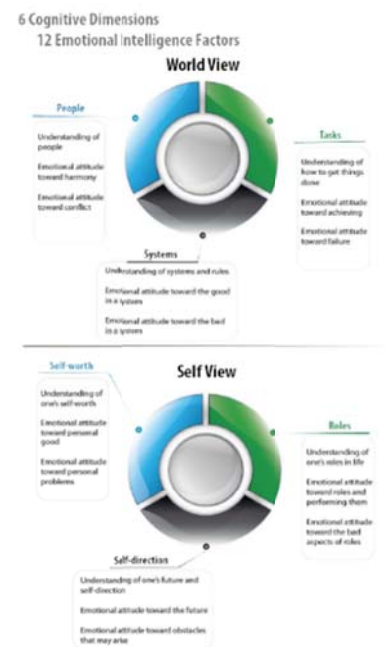
The key observation from the above table is that while both groups are business oriented, the intensity of the individual motivators is held in nearly reverse sequence. *Visionaries are big-picture thinkers, entrepreneurs and sales people—based on millions of assessments from all over the world*, the number one motivator associated with these qualities is **ROI** (a desire to earn money or value from whatever you do). **Leadership** (taking responsibility for their actions or the actions of their team) is secondary to this primary motivator and **Knowledge & Discovery** is important, but their belief is, “I will hire others to keep us on the leading edge of technology and the details of running the business.”

Integrators are hired to study, plan, implement and make real. They love to investigate the concepts that the Visionary dreams up, and find a practical way to make it work—which explains the number one motivator, **Knowledge & Discovery**, followed by **ROI** to turn it into a practical outcome. They use their **Leadership** to make it happen throughout the organization. If Integrators held the same motivators in the same sequence as Visionaries; they would be founding a rival agency, not working for a Visionary! While having both a Visionary and Integrator attitude in one person is ideal, it is a rare combination. This has implications for questions of succession and business continuity.

Competency (see charts on pages 16-17)

This segment of the assessment is a validator that the Talent, Attitudes, Energy & Drive are consistent with what we have observed to date. For the Visionaries, their Talent seems to gravitate toward guiding a team by showing the way or doing the work—it is a very hands on mode of leadership. They are correspondingly less oriented to drawing up plans or organization to make things run better or faster; this is consistent with the earlier profiles that suggest this is an entrepreneurial mindset who wants to create something “new and shiny” as opposed to the more tedious work of fine-tuning operations.

While we have already established the Visionary is a “people” person and a great communicator, this profile confirms a Talent for strong interpersonal capacity. Their relative lack of focus on plans and organization also suggests that Visionaries may not be as focused on enforcing rules and procedures. In some cases, Visionaries may not hold people as accountable as the business requires. Similarly, when it comes to their



Leadership role, Visionaries range from “love the role” to “hate the role”. They are uniformly hard on themselves, and their strong Energy & Drive tends to come from the future in terms of possibilities and potential as opposed to the tedium of day-to-day reality.

Integrators show a more even Talent profile—they are able to draw on capabilities of Relationship Building, Doing a Task, or Planning/Organizing which tend to be equally strong. This suggests a fluidity of styles to deal with the current requirements of project work or people management. Integrators also tend to have this same balance internally, and tend to be Self-Confident, Engaged with their role and Optimistic about the future. This suggests a more diverse source of Energy & Drive that gain from both future possibilities and the challenges of their day-to-day role.

WHAT DOES THIS MEAN FOR PRACTICAL PURPOSES?

Let’s talk about “how to” use this information; here are some broad topics to consider:

Attracting Integrators. Integrators are smart, engaged with their work and have high Energy & Drive. Advertisements, “sales pitches” and job description to attract potential Integrators should speak to the *challenges and variety* of work that will greet them every morning. They have vital and active minds, they love a challenge and most important: *Integrators can become bored with routine*. This is why a good Integrator works so well with a typical Visionary—the Visionary *loves* coming up with new ideas, new concepts, new approaches and the Integrator loves new challenges.

This does not mean that the relationship between an Integrator and Visionary is smooth and trouble free. *Quite the opposite*. In many cases, sparks will fly, heads will butt and words will be exchanged. Most Integrators and *all* Visionaries are outspoken and will say what is on their minds. Both are comfortable with a degree of conflict and are happy to engage in a debate. This can be traumatic for the rest of the team, but will not be an issue at all for the Integrator or the Visionary.

Interviewing Integrator Candidates for Hire. It is important that the Visionary not set his or her eyes on hiring a “Mini-Me”. Keep in mind the table about the strongly held Motivators for Visionaries and Integrators.



We all tend to be attracted to people who see the world the way we do. That is, a Visionary will thoroughly enjoy talking to a younger version of themselves, and indeed, it may be important to make that hire knowing that they have the Energy, Drive, Talent and Attitude to sell new business, invent new services and...eventually leave to start their own firm!

Questions or Discussion Points	What You Need to See or Hear
<p>Resume shows more degrees, certifications and courses than “average”.</p> <p>Likely a steady climb in responsibilities, titles and income.</p>	<p>Likely actively engaged with learning now or in the recent past.</p> <p>Shows ambition, wants to assume more responsibility.</p>
<p>Hobbies include reading and learning, participating in <i>competitive</i> sports, or doing things that are more about saving or making money.</p>	<p>A wide breadth interests, but you can “see” the leadership/competitiveness, ROI and learning interests in his or her examples.</p>
<p>Knowledgeable about politics, and business topics beyond their immediate professional focus.</p>	<p>Their interest in knowledge and learning is not limited to their professional interests necessarily</p>
<p>Talk about a recent book/article you read, or a webinar/seminar you attended.</p>	<p>Press for details of the take-away and how often they read or study to validate their “knowledge orientation” as opposed to being a clever interviewee.</p>
<p>Volunteer Activities: ask about extra-curricular activities listed on the resume, or in general conversation.</p>	<p>Volunteer work may be heavier in “productive practical” endeavors to benefit their career and less on social service or not-for-profits—though one does not preclude the other. Expect them to highlight awards and recognition.</p>
<p>Ego or Self-Confidence? a well-spoken, <i>extroverted</i>, successful person may often come across as ego-oriented.</p>	<p>Ego-oriented people only talk about ‘my’ accomplishments and ‘my’ success. A self-confident person talks about his or her team, people who mentored them and sources of their inspiration.</p>
<p>Lacking Self-Confidence? A well-spoken, <i>introverted</i>, successful person may come across as self-doubting rather than confident and strong. Follow up with:</p> <ul style="list-style-type: none"> • Ask about their future plans, goals and ambitions. • Have them discuss what they like/dislike about their current or most recent positions • If they could “wave a magic wand” what would they change about the company they (used to) work for? 	<p>Listen for clear, unambiguous statements about the future they imagine for themselves. Expect them to, “paint a picture” about their hopes and dreams. This suggests a deep embrace of their ambitions and an ability to communicate clearly.*</p> <p>Have they run their own businesses or is that a goal? While this is wonderful in many respects, this person may be a “Mini-Me”.</p> <p>Like and dislikes are important, is the role you envision going to appeal to them? Listen for complaining or blaming. A good Integrator takes full responsibility for their actions.</p>

<p>People Management: Ask them about a time they turned around the performance of another person.</p> <p>A good follow up: How much time or effort do you invest in “turning around” performance before you let someone go?</p>	<p>Listen for terms like ‘mentoring’, ‘teaching’ and the frequency they engage in this type activity.</p> <p>Follow up: besides hearing a reasonable amount of time (30-60 days), observe their comfort level with the issue of firing or re-assigning.*</p>
<p>Ask them to describe their people management philosophy.</p>	<p>Expect to hear a well thought-out philosophy, quotes from management thinkers and authors, and stories from experience. Listen for themes about being open and fair, balanced with being practical and getting <i>good work done well</i>. They delegate and maintain control.</p>
<p>Project Management: How do you prepare yourself and get organized to handle a large, complex or highly visible project?</p> <p>A good follow up: How do you prepare for the inevitable problems and things that go wrong on big projects?</p>	<p>Listen for clear, unambiguous statements about software or other tools they employ. Listen for enumerated steps and sequences that appear to be committed to memory because they rattle them off so quickly and confidently. They will talk about regular communication with key people and their teams.</p> <p>Ideally, you never ask the follow up question because they address it organically, but their response ought to be quick, clear and concise because they <i>know</i> project management <i>cold</i>.</p>
<p>Things you can judge throughout the interview:</p>	<ul style="list-style-type: none"> • They listen well and pick up on your body language or cues easily • They speak clearly, diplomatically and to the point without being verbose or offensive • They are well organized in their thinking, speaking and presentation. • They come across as a bit “serious”
<p>...and the most important thing of all: Can you imagine working with them 10 hours a day, 5 days a week for the next 10 years?</p>	<p>The answer must be Yes! no matter what the assessment or resume has to say.</p>

* for more on this subject and interviewing in general, download our INTERVIEW guide at <http://www.strategictalentmgmt.com/resources/>

Managing and Developing Integrators. Most Integrators are as motivated to be in charge and in control as the Visionary they work for. *Visionaries must learn to “let go” and allow the Integrator to run the business.* This is a challenging request knowing that Visionaries lead by example, love “doing” and feel they have earned that right having built up the agency from scratch. The key to success to a successful management relationship between Integrators and Visionaries are to clarify expectations of both parties up front.

This means moving beyond a job description, and discussing boundaries, outcomes and results. Write them down, discuss them, explore the



possibilities and *agree to a process to revisit and provide feedback about implementation of these expectations.*

Managing the Integrator / Visionary relationship can be a topic unto itself, but the key topic concerns the Visionary giving the Integrator management *authority* to go along with their *management responsibilities*. The Visionary is not “big” on rules, procedures and processes, and will tend not to “like” the Integrators approach. The Visionary should not focus on “how” the Integrator approaches the work; simply provide the Integrator clear outcomes or boundaries concerning profitability, new sales, retained business, AGI and so forth. The Visionary should work *on the business* and allow the Integrator to work *in the business*.

Communicating with, and Retaining Integrators. Communication should take place easily between most Integrators and Visionaries, because (many of them) share an extroverted style. The *process* of communication; however, will need attention. Both parties need to carve out time to discuss *how* they are working together and making progress to one another’s expectations, in addition to their regular discussions about schedules, deadlines and business. This will not be easy, as they are both busy people with lots of responsibilities; but it is important to set the tone for employees at all levels to spend as much time talking about *how* they communicate and work together as they spend talking about project schedules and technical aspects of the work.

“People” or “soft-skill” issues (like communication, relationships, attitude to change) are generally recognized as being the main obstacles to effective management. Make sure soft skills are effectively and regularly addressed between the Visionary and Integrator and indeed, within the entire agency.

Succession and Business Continuity. The role of Integrator complements the Visionary, and is valued for taking on roles that the Visionary typically does not care to do. As a business matures, it will require Integrators to keep things running smoothly. In my experience, when a company reaches or passes the 15th employee, informal systems based on the personal knowledge and involvement of the Visionary will begin to break down due to sheer scope and complexity. If business systems are not formalized, the agency’s growth may be limited. The Integrator *loves* to develop, train and hold people accountable to *systems*.

QUARTERLY ROCKS	
	Who
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

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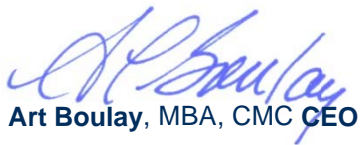
Whether directly, or indirectly, the Integrator is also valued as a succession player. A great Integrator can act as the General Manager, while sales and marketing staff take up roles previously held by the Visionary founder. An Integrator who shares some qualities with the Visionary is rare, but would clearly set up an ideal succession plan for a retiring Visionary. A well-run agency is also an attractive acquisition or merger candidate for another founder/Visionary or a current employee who is Visionary material. No matter how you view the succession issue—an effective Integrator/Visionary team is essential.

PROGRESS FORWARD:

The next step is for you to review this document and assess your own succession issues or Integrator / Visionary issues, and to fill in the unique aspects of your agency's culture, communication and management styles. This is important, as this becomes the base document from which we determine the best people to fill the Integrator role, and other future positions through hire or promotion. Succession considerations are tightly integrated with the Integrator discussion.

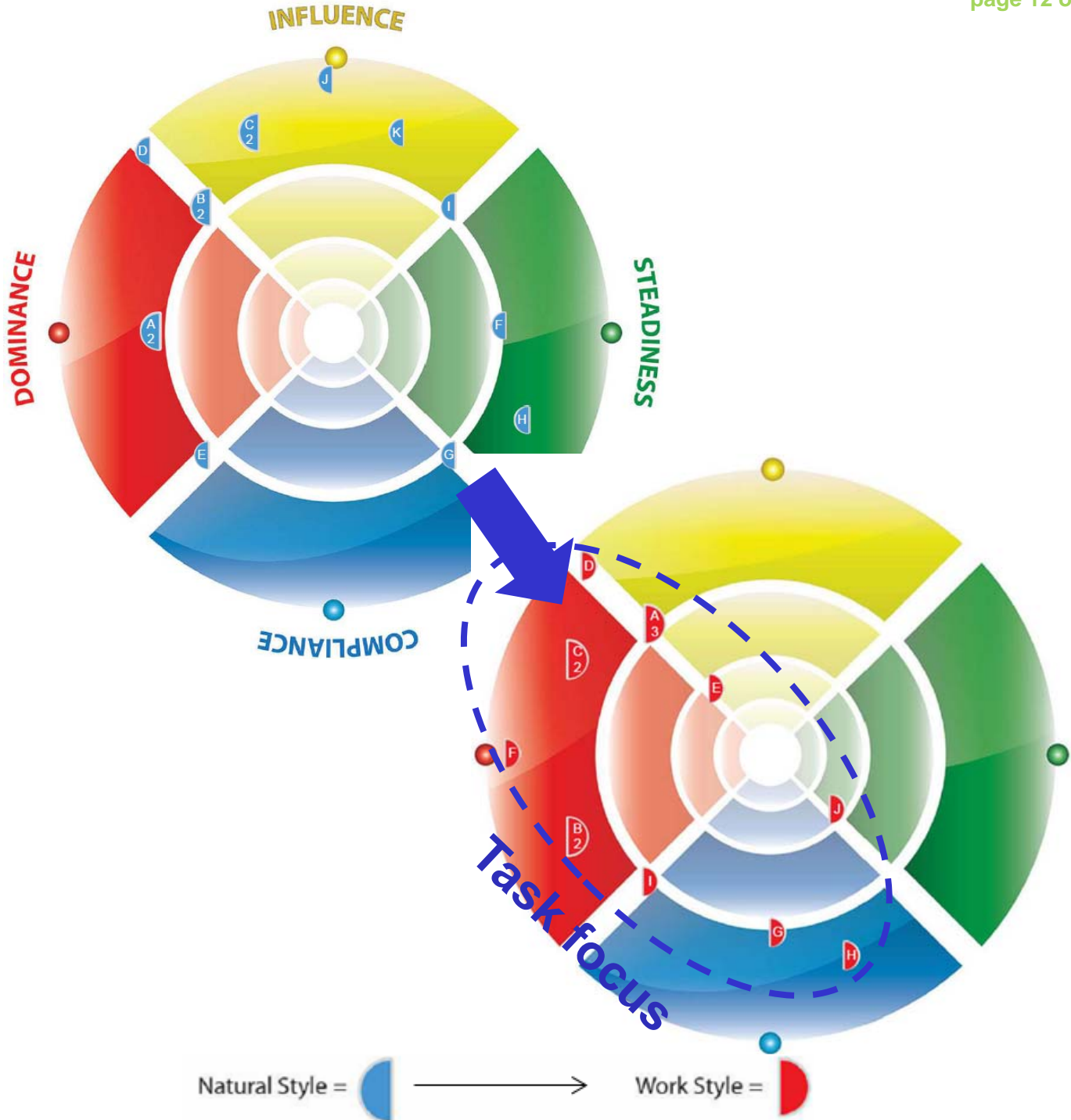
I look forward to working with you and all the AMI agencies in whatever role best suits your needs and my capabilities, and I look forward to a time in the near future where we can measure concrete progress toward your business goals.

Very truly yours,



Art Boulay, MBA, CMC CEO

***Your People define your Culture,
Your Culture is Your Brand,
Your Brand is Your Business.***



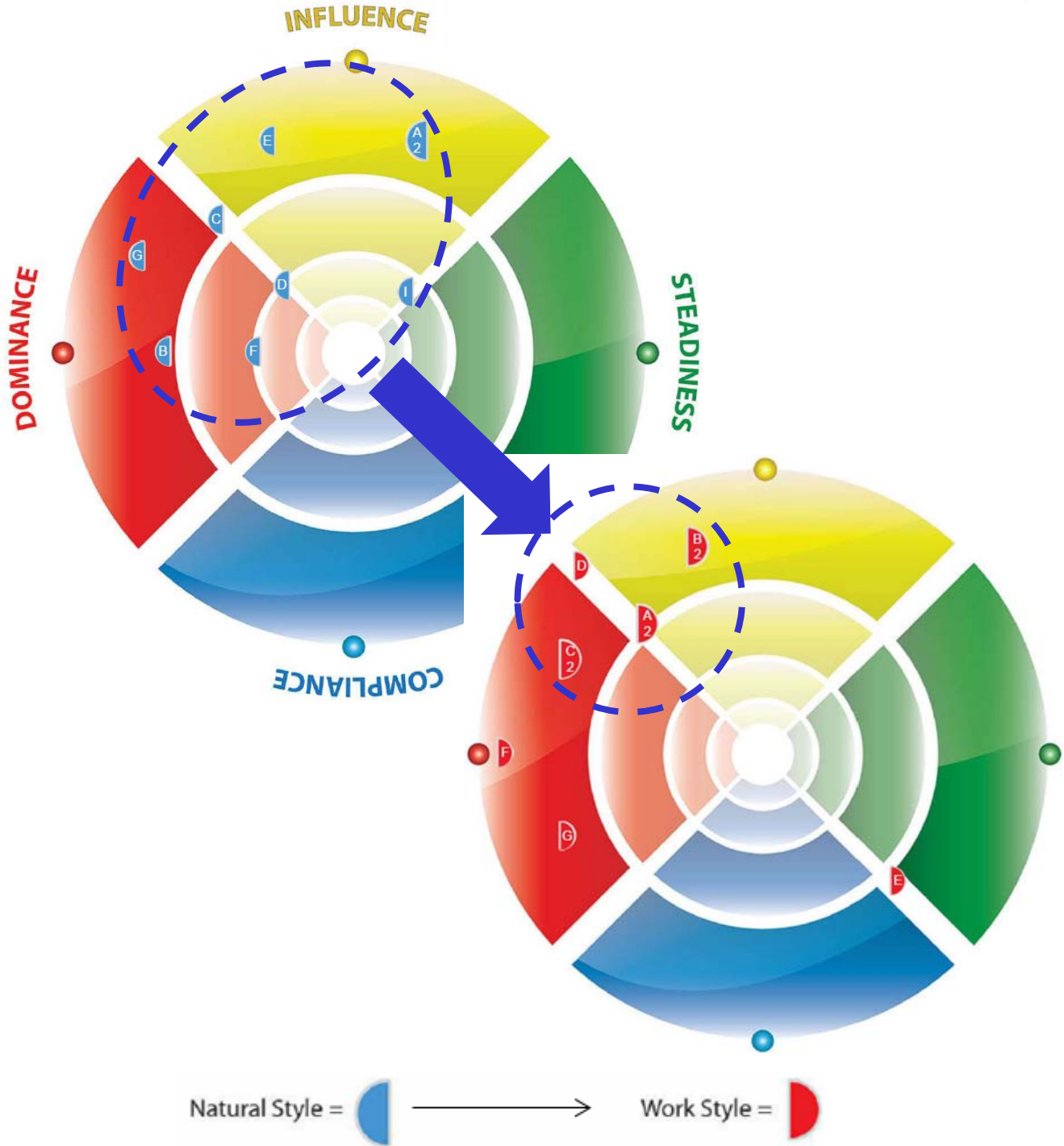
OBSERVATIONS: The Integrators “natural” styles are all over the board. Many Integrators look like the Visionaries, extroverted (though skewed more to a “people” style), but about 1/3 are more “serious”, team oriented or introverted.

The Integrators adapt strongly to the “dominant” style (and 100% adapt a “task” oriented style), which may be to satisfy Visionaries’ expectation for results. It appears the AMI Integrator is adapting precisely to Gino Wickman’s definition.



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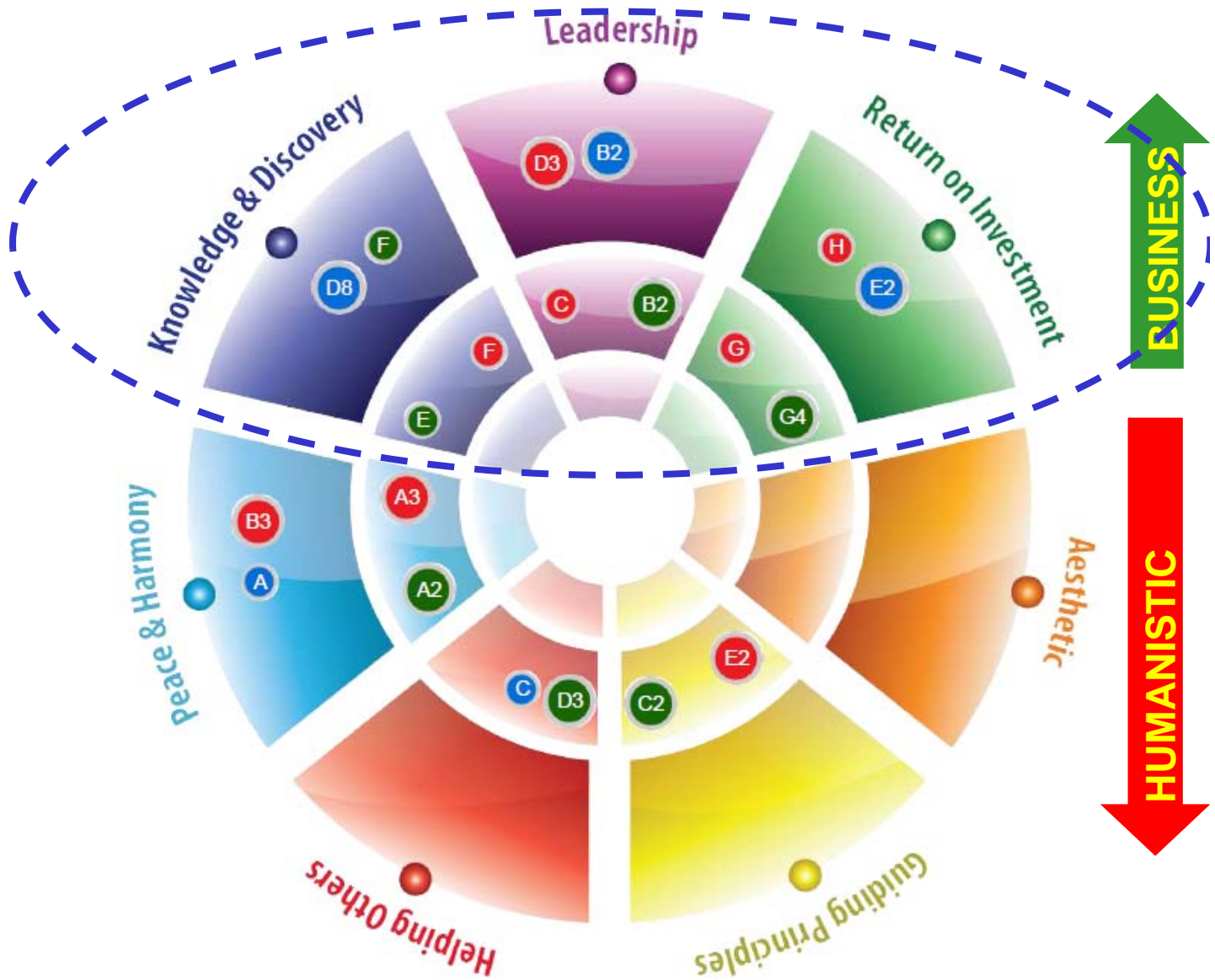
OBSERVATIONS: In their “natural” style, almost every Visionary is extroverted and ranges from strongly task and “dominant” focused to people focused and overtly friendly. In their adaptation to “work”, they tend to “tighten” up to be more balanced between the dominant (driven, results focused style) and influence (friendly, outgoing style).

In both styles, Visionaries are big-picture thinkers, great communicators and sales people. They have both a task and people orientation to generate ideas and inspire others to follow, which is exactly what Gino Wickman describes.



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Red box:
 indifferent to
 motivator

First Motivator = Second Motivator = Third Motivator =

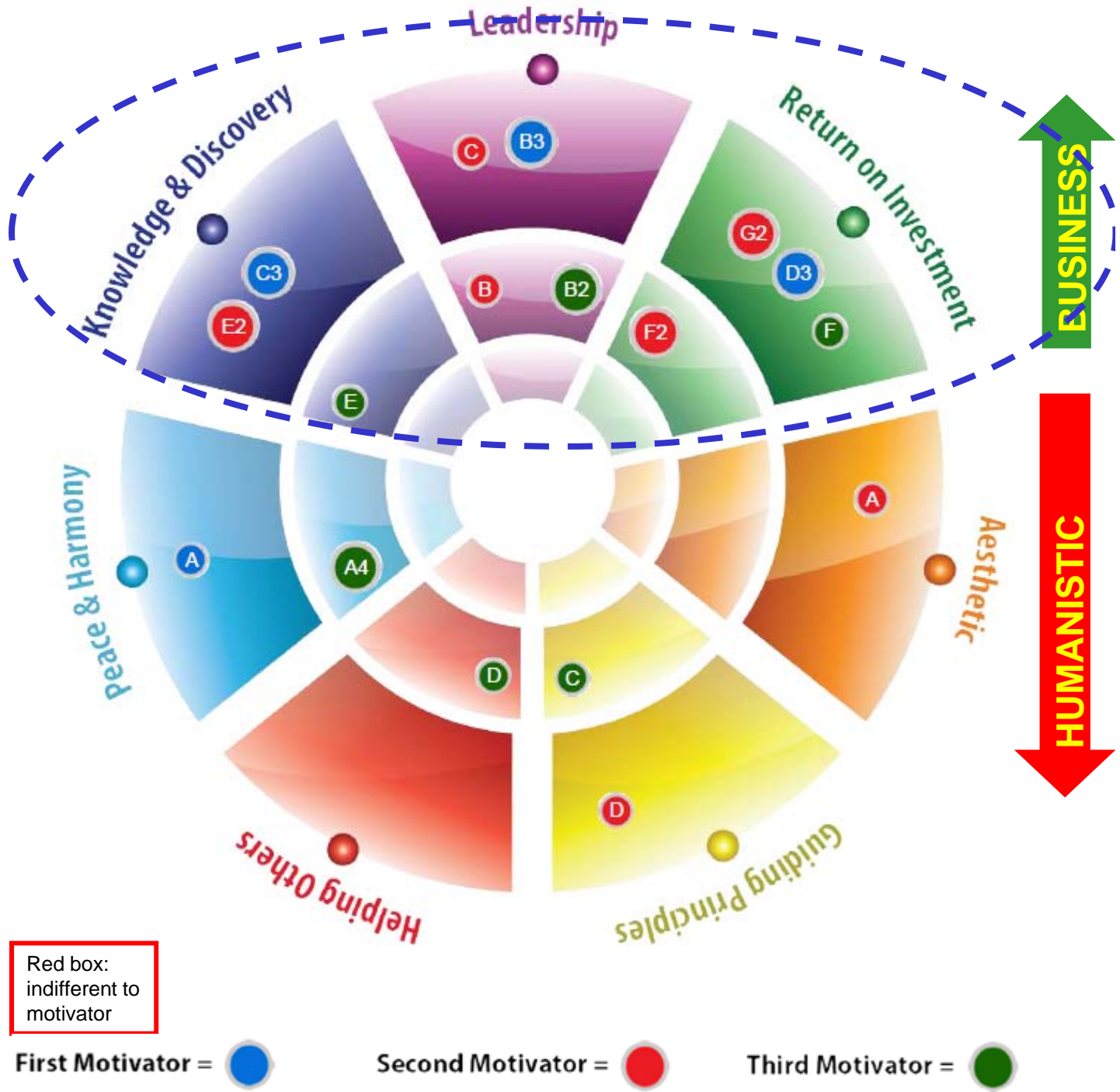
OBSERVATIONS: The integrators are **business** focused like the visionaries, but are powerfully more focused on **Knowledge & Discovery** (learning) than Visionaries. I attribute this to their role: Plan, organize, stay ahead of the learning curve and teach. Integrators are correspondingly less intensively focused on **ROI** and **Leadership** than Visionaries.

Integrators tend to be more motivated by **Peace & Harmony**, meaning Integrators are *slightly* more team oriented and conflict averse than Visionaries.



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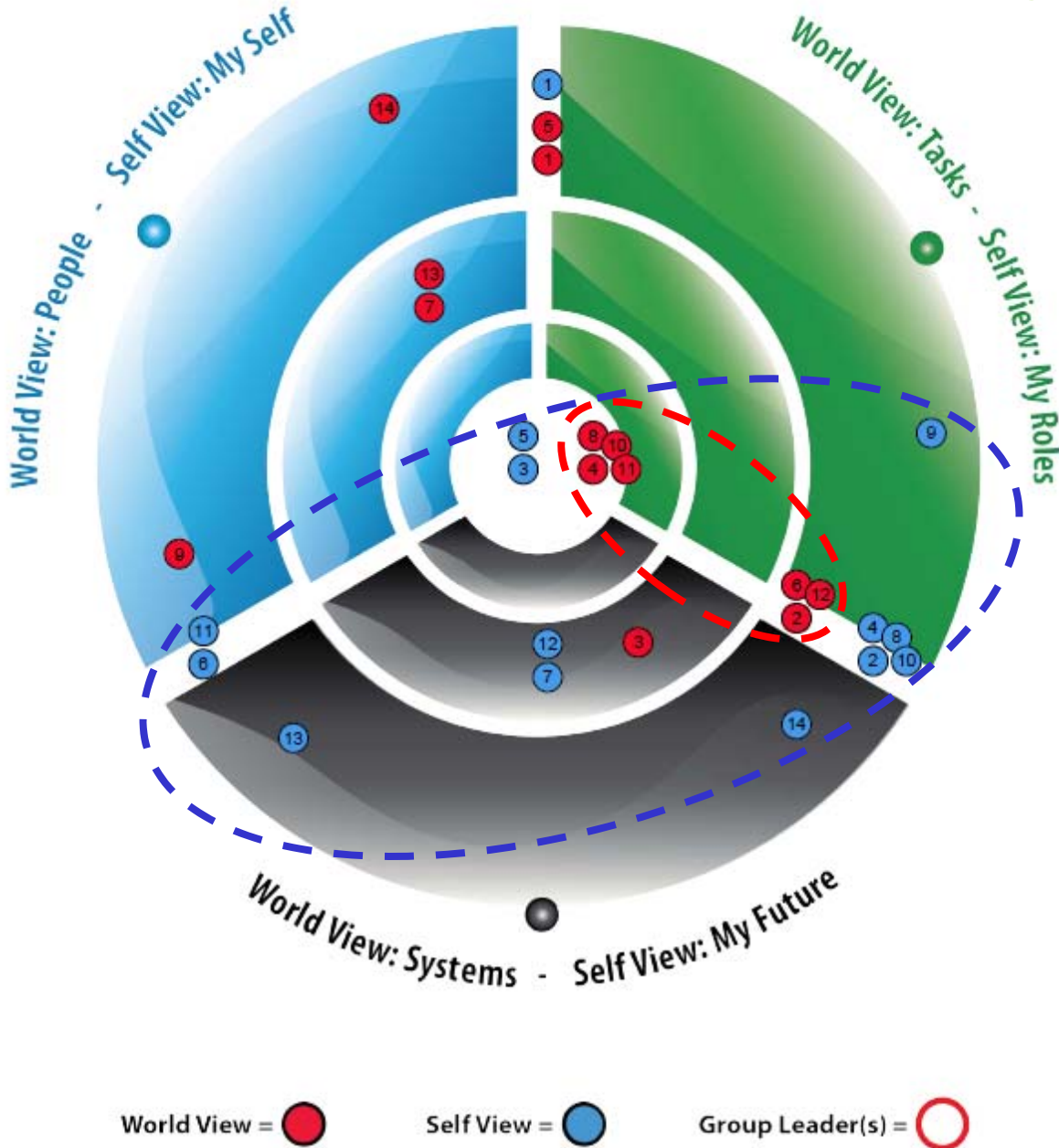
OBSERVATIONS: The Visionaries are strongly **business** focused—and *slightly more* focused on the bottom line than anything else. The **humanistic** motivators are weakly represented among Visionaries.

Visionaries are bottom line oriented business people; they are not necessarily team players or locked into one way of doing something. They are change agents focused on an outcome that benefits themselves and their business interests.



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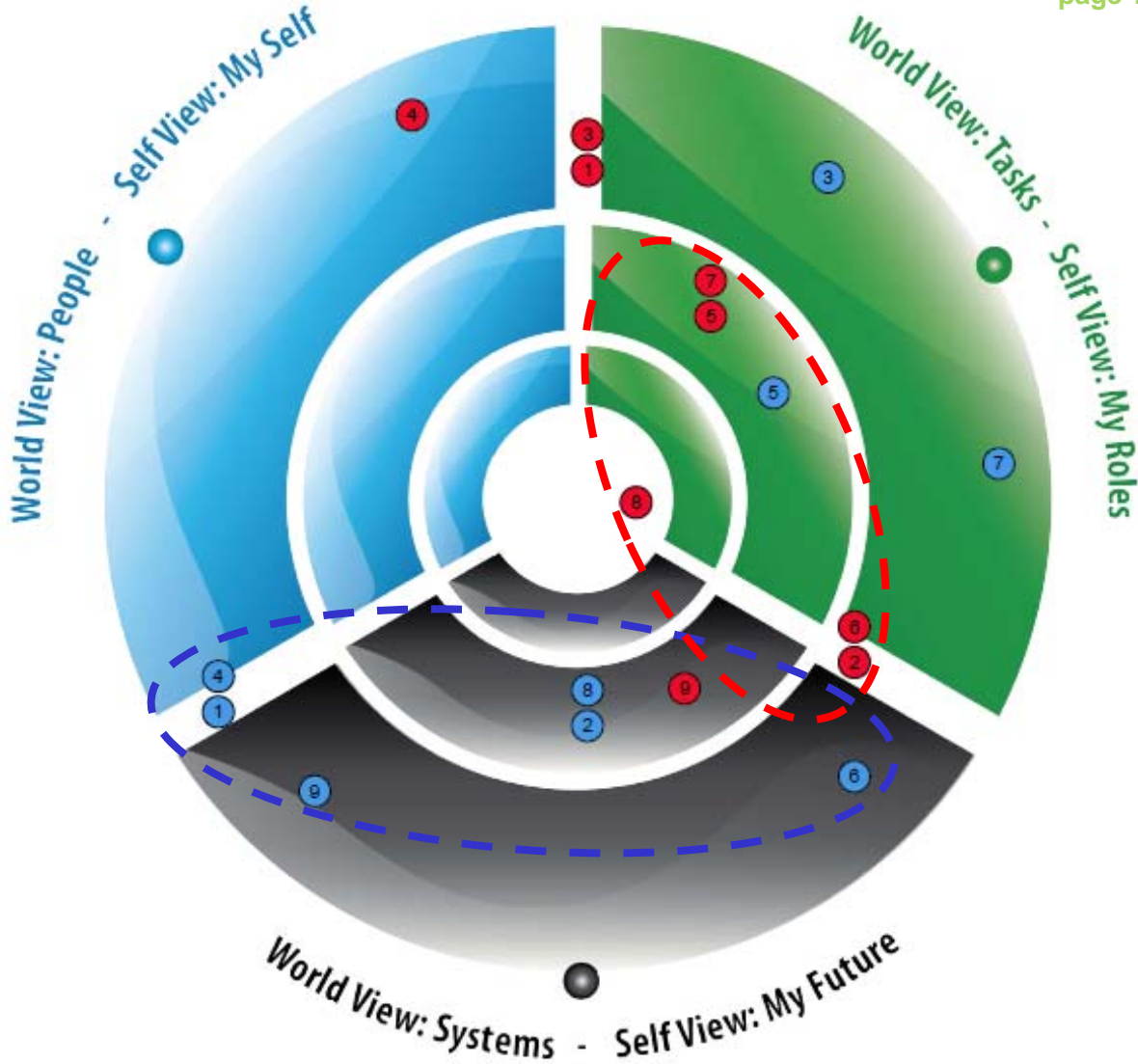
OBSERVATIONS Integrators tend to be balanced between the three factors of People, Tasks and Systems (planning, procedures). This suggests they can turn to the appropriate strength as needed to accomplish the task. They are more focused on planning, organization, relationships & holding people accountable than the Visionaries, as a rule.

Integrators tend to be “high energy” and their energy comes equally from either being engaged with their work or optimistic about the future and where they are going. Most of the group is engaged with their work, and tend to be balanced between their Self-confidence, Engagement and Future orientation. They tend to show more energy & drive than the Visionaries, as a whole. This explains their valued position in the companies.



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World View = ●

Self View = ●

Group Leader(s) = ○

OBSERVATIONS: Visionaries tend to be more focused on “doing” or leading by example and somewhat less focused on “planning” and holding people accountable to rules and procedures. They appreciate the value of rules and procedures, but will bend the rules to gain a practical result. They put practical results above everything else, including relationship building.

Visionaries tend to cover the entire spectrum from “loving” what they do to “hating” what they do. They tend to be “high energy”, and their energy tends to come from being optimistic about the future and where they are going. They are not as engaged with their roles or as self-confident as the Integrators, which likely reflects their stage in life and a certain fatigue with years of “doing”, building and growing a business.



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