



***Vision, Mission, Strategy  
& All That Stuff  
– Comes to Nothing Without  
Assessing Competence***

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## Senior Management Leadership Imperatives

Many Senior Management leaders recognize the imperative to implement significant changes within their current operating environment. Whether it's the vision of a "bright future" or the threat of a "dim tomorrow", these leaders are driven, often unsuccessfully, to initiate change. While the challenges that drive the change initiative are different, the issues Senior Management faces are the same.

Some of the challenges that drive change initiatives are:

Visions	Threats
<ul style="list-style-type: none"> <li>■ Becoming the "best"</li> <li>■ Achieving Market Share</li> <li>■ Entering a new product/service area</li> <li>■ Merging</li> <li>■ <i>See John's paper</i></li> </ul>	<ul style="list-style-type: none"> <li>■ Losing customers to the competition</li> <li>■ Losing revenues/profits</li> <li>■ Having products/ services displaced.</li> <li>■ Begin acquired</li> </ul>

## Root causes of unsuccessful change initiatives

Some organizations respond successfully, but, unfortunately, more seem to respond unsuccessfully. In our experience, the difference between successful and unsuccessful change initiatives is not in the effort or resources expended but in the focus of these efforts.

We find Senior Management teams often:

- Focus on **"rear view mirror"** measurements rather than current **"headlight measurements"** to guide needed changes in the workforce.

This results in Senior Management understanding what happened after the fact, but not being able to predict and thus control the future direction and efforts of the workforce.

- Focus on overcoming the resistance of the workforce to change rather than on gaining their commitment to change.

This results in the workforce viewing the change as just one more **“flavor of the month”** important only to Senior Management. They either dig their heels in identifying reasons why they can’t change or simply agree to the change but continue with their previous work patterns when not under scrutiny.

- Focus evaluation efforts on the performers rather than on the performance.

This results in supervisors subjectively rating attitudes and attributes of their subordinates without being able to outline objective evidences of excellence. At its best, **evaluations become an event to endure**. At its worst, evaluations become a pact between the supervisor and subordinate to “fly under the radar” and not cause any waves with Senior Management.

## The PDS Approach

PDS has found an approach to successfully addressing these issues. This approach has proven effective in For-Profit and Not-For-Profit, and in large-capitalization and small-capitalization companies.

The PDS approach focuses on restructuring the work patterns (practices) of your workforce to align with your organization’s vision and decision-making processes though the development of a **Competency Assessment Matrix (CAM)** performance evaluation system.

PDS accomplishes this by:

- **Diagnosing** the extent and nature of the gap between your vision and the capacity of your people, their work patterns, and your organization’s processes to achieve this vision.
- **Designing** a series of “Competency Coaching Clinics” to create behavioral “evidences” for research-based key competencies that provide value to your customers and impact customer decisions concerning your services or products.
- **Delivering** “Competency Coaching Clinics” in a manner that provides supervisors the skills necessary to
  - ✓ Coach their subordinates towards improving their competencies,

- ✓ Promote disciplined risk-taking, e.g. a “think-do-fix” bias rather than the more typical “think-think-do”, and
- ✓ Ensure Rating consistency across the organization.
- **Delivering** consulting support to Senior Management in using the emerging data to drive strategic competitively oriented decisions.
- **Designing** competency-oriented, distance training programs to ensure the workforce receives training on a timely, “as-needed” basis.

***The key to CAM's success is that:***

- Its development involves those individuals whose support is needed if the change initiative is to be successful.
- It is based on your company's research and experience concerning what your customers' value and impacts their decisions concerning your product or services.
- It provides evidence around which supervisors can objectively coach for improved performance and make retention and promotion decisions while automatically filing reports.
- It provides Senior Management with immediate, objective, graphically displayed data concerning the focus and performance of the workforce in key competency areas e.g. product knowledge, customer relationship, and strategic (competitive) stance, etc.
- It provides the Training Division with current data needed to customize and focus training programs,
- It provides the workforce with clear—can see it, can be modeled, can be replicated—directions for improving their performance.

## How can PDS help you?

1. With Senior Management representation, PDS will complete a preliminary analysis of the capacity of your workforce, their work patterns, and your company's processes to achieve your vision.
2. Senior Management identifies a Senior Level executive to lead the initiative.
3. The Senior Level executive, PDS, and an identified Change Initiative team—managers, human resources, technology, etc. representatives--develop and obtain approval of a preliminary change initiative plan based on the results of PDS and Senior Management diagnosis results. Note: Since action often precedes understanding in a change initiative, plans are considered preliminary and subject to change. This will ensure the flexibility needed to take advantage of suggestions and thus gain commitment from the workforce. In PDS terms, this is akin to ***flying the airplane while you build it.***
4. PDS and selected insiders begin the design and delivery of a series of "clinics" that will develop your company's CAM.

## How is the CAM created?

5. *The team prepares a preliminary CAM that describes a set of competency clusters that are needed to realize the organization's vision along with preliminary and sample evidences associated with these competencies.*
6. *The preliminary CAM is distributed to employees for use as a self-assessment tool and the results are summarized. These results and behaviors become the starting point for the Competency Coaching Clinics.*
7. *The Competency Coaching Clinics are designed for supervisors with each clinic focusing on a single competency cluster and the resulting behaviors. Evidences are developed for each behavior and supervisory coaching competencies are practiced with actual subordinates. Typically, the initial clinic is 3 days in length to provide time for an overview. The remaining clinics are two days in length. The first day focuses on reviewing inter-clinic coaching assignments, developing evidences, gaining more in-depth skill in coaching and the second day focuses on practicing the skills.*
8. *Once the initial series of Clinics is completed the CAM is finalized and supervisors spend the next three to four months coaching their subordinates on selected competencies and behaviors. The Change Initiative Team monitors*

and provides feedback as to the supervisors' use of the CAM and rating consistency with the evidences.

9. Selected supervisors attend a Competency Refinement Clinic and suggest refinements to the evidences based on their experiences. These suggestions are reviewed and refined further by the Change Initiative Team and submitted for approval to Senior Management.
10. The competencies are shared with and used by the Human Resources Division in recruitment and selection processes. The competencies are the basis for promotion discussions. The results of the CAM are a part of each individual's the bonus structure. The summative results of the CAM are used by Senior Management to predict their sales and marketing impact on specific product/service initiatives and the Training Department to develop training programs for both supervisors and subordinates.

## Competencies, Behaviors, & Evidences



