



KOLBE PROFESSIONAL AWARD APPLICATION:

Applications are due
July 17, 2017

Date: _____

Name: _____

Nickname: _____ and email: _____

Organization: _____ Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: (day/work): _____

Have you registered to attend the Conation Nation Symposium? _____

COMPANY SPOTLIGHT:

Have you received any honors, recognition or awards? If so, please list them here and include the nature of the award, the organization that awarded it, and when you received it.

CRITERIA:

Identify 1-3 examples of companies and/or individuals who have benefitted from your expertise as a Kolbe Certified™ Consultant through the use of Kolbe solutions (advanced), products, and methodologies. Include details about the business (i.e. type: for profit, not-for-profit, government, military, academic) or, in the case of an individual or individuals, the pertinent / relevant information about the situation, impact, and results. Please attach separate sheets and other supporting documentation.

- Provide a detailed description of the objective results that were achieved, how they were achieved, and what role Kolbe products, solutions, and methodologies played.
- Bonus: It will be helpful to include:
 - Testimonials and/or letters of support from the organization or individual(s).
 - A video that illustrates a compelling demonstration as to how the project(s) described achieved important and significant results. Please ensure that the file size is less than 10MB, if emailing (Contact us for guidance).
- Winner will be selected by Copper Circle members (Kolbe Certified™ Consultants with 10 or more years of certification).

Email this application no later than **July 17, 2017** to: cayala@kolbe.com



Memorandum

To: Christine Ayala, Kolbe Corp.

From: Chris Elias, Principal, Nexecute LLC (4 3 9 3)
Mark Freier, Principal, Nexecute LLC (6 4 8 2)

Date: July 13, 2017

Re: Application for Kolbe Professional Award
Example Companies

Thanks for the opportunity to submit an application for the Kolbe Professional Award. The following information is provided to give you some examples of how our clients benefit from our work with Kolbe.

First, I think it's appropriate to explain how we currently utilize the Kolbe in general with our clients. Our primary work with client companies is focused on improving execution and results. We do this through improving both processes and team dynamics and health. The Kolbe Index has allowed us to help teams become much higher functioning through better interaction with one another. The knowledge gained from implementing The Kolbe Index allows us to identify areas of strain and tension between team members and helps us guide them to move toward a better functioning, more trusting team. We currently utilize the Kolbe Index with each executive team we work with and we are finding that more and more of our clients want to go deeper, including conducting Kolbe Indexes for everyone in their company and implementing the RightFit process into their hiring.

Next, all our client work listed here are works in progress. For client 2, I purposely chose a client that has been a difficult one. Though signs are showing that we are moving toward a success, there has been a lot of issues and some fallout because of actions taken by some senior leadership members. Our work with the Kolbe with this client has occurred somewhat after the fact as we have only been brought in recently. There is a lot to still do with them, but we believe we will get there.

Finally, a note about confidentiality. Due to the extreme sensitivity of our work and non-disclosures in place, each client example listed will have names excluded. We have permission for the general examples, but cannot provide specific testimonials as that may compromise sensitive information especially related to some individuals. Each example company has been asked for a testimonial on how the Kolbe has impacted their work. We are waiting for legal clearance from them. If we receive anything specific in short order, we will present them separately.

On the following pages, we have added three client case studies of how Kolbe has been utilized.

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Client 1:

Industry: Education

Team: Executive team overseeing a school district

A new CEO was placed in charge of an organization that was failing due to massive levels of mistrust and broken processes. Upon quick analysis, the CEO realigned his team, eliminating a couple of members that weren't aligned with the core values and the direction of the organization. The remaining members began to move forward with trying to change the culture of the organization to be more productive. There were problems, though, the remaining team wasn't interacting well and communication was poor. Furthermore, trust wasn't at a high level for a lot of reasons.

We were brought in based on a recommendation to help the team get aligned. We immediately conducted Kolbe A Indexes on each of the members of executive team (3 members total after the restructuring - all with "C" suite titles). The results were as follows:

<u>Title</u>	<u>FF</u>	<u>FT</u>	<u>QS</u>	<u>Im</u>
CEO	3	4	8	4
CFO	8	8	1	3
CAO	6	7	3	4

It became immediately obvious why there was so much conflict, especially between the CEO and CFO. Through a series of focused conversations and coaching, this information helped them better understand how to interact with one another.

Now, when the CEO is thinking out loud and throwing out all kinds of ideas, the CFO understands that she needs to discuss what's really going on and which path or idea to implement. The CEO recognizes that he does this and will tell the other two when he wants to "Ideate" to let them know he's just wanting to brainstorm. He further understands their need for data, structure and risk mitigation, so he listens intently and allows them to act on their instincts. He also stays out of their way so as to allow them to perform at a higher level.

Also, both the CFO and CAO who had a hard time understanding why the CEO wasn't keeping up to speed on the information they were sending him, began to understand that they need to send him some summary information. Their practice, up to that point, had been to continuously send him several highly detailed, multi page documents almost daily. When he would ask "so what's the summary" they just got frustrated with him. Now they understand his MO and have adjusted their behavior accordingly.

This has also happened with the overall structure of how things were happening. The CEO had conducted meetings on a very "Ad Hoc" basis and when there were meetings, sticking to the agenda was nearly impossible. By giving control of the

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meeting structures as well as the planning processes to the CAO, things began to run much more effectively.

Overall, the team has moved from highly dysfunctional to highly functional. We are now taking the process deeper into the organization to open up discussions on better team dynamics.

Client 2:

Industry: Large Manufacturing

Team: Executive Team of a Support Services Organization for North America

A foreign based organization made a decision to change leadership of this division in North America. A new CEO was put in place and that CEO began building his team. Mistrust built quickly as some long-standing employees were let go for no apparent reason. Other key employees were frustrated and considering leaving.

We have worked with other organizations within the North American group of companies for this international entity. One member of the team that had experienced our work in one of the other companies asked us to come in and help identify the issues and work on helping the team improve. As with all of our companies, we began with conducting Kolbe A indexes with the team members. The results were as follows:

<u>Title</u>	<u>FF</u>	<u>FT</u>	<u>QS</u>	<u>Im</u>
CEO	7	7	3	3
CFO	9	6	3	3
Corporate Controller	8	7	2	4
Director Solutions	8	7	4	2
IT	6	7	3	3
General Council	8	3	6	4
VP Human Resources	7	3	9	1

As further background, when the CEO was hired, he eliminated and hired the next 4 people on the previous chart. As you can see, he basically cloned himself. Because the organization was matrixed, he didn't have control to hire the last two on the list or, I believe he would have changed them as well.

Generally speaking, this organizational was supposed to be entrepreneurial in nature and supportive of the rest of the organizations in North America. With so little cognitive diversity on the team, the top 5 members (and the CEO, in particular), would spend all their time gathering data, but wouldn't share any of their thoughts until they were sure of their decisions - there was an almost extreme fear of risk

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among those members which caused inaction. Thus, many potential ideas to improve support for the other organizations weren't discussed.

Furthermore, there was a great push for more and more process. The value they were supposed to be generating as a support services group disappeared as the supported companies couldn't seem to get anything done. Continued data gathering and bureaucracy got in the way of productivity. When other members of the organization, especially the General Council and VP of HR pushed back on this, they were met with a high level of disrespect and their opinions weren't considered in the process.

The CEO finally began to recognize that the team was becoming extremely dysfunctional and work in the organization was moving at a snail's pace. Implementing the Kolbe Index told the story quickly. There was an immediate "aha" moment and this allowed us to open up the conversations around trust, respect and the need for more diversity. Unfortunately, this may have come too late. The CEO had burned bridges with many people and the mistrust of this team permeated to the companies they were supporting.

As of the writing of this case study, there is still a lot of work to be done. It has now become obvious that there may need to be a change of this CEO and perhaps the CFO. As no RightFit was done for these positions initially and also perhaps of core values mismatches, frustrations throughout the greater international organization may force change sooner rather than later.

On a brighter note, though, the use of the Kolbe Index has helped the other members of the team work better with one another and allowed them to rely on each of their other conative strengths for improving performance. In spite of the other dysfunctions, they are beginning to perform and within their own microcosms, beginning to provide better value to the companies they are supposed to be in support of. There is still much work do here too.

We are also now talking about using the RightFit to ensure this doesn't happen again. We believe that this is a textbook example of how dysfunctional or non-performing an executive team without enough conative diversity can be.

Client 3:

Industry: Orthopedic Manufacturing

Team: Senior Leadership Team of one Division Implant Group

A new GM took over a division of the Implant Group of an Orthopedic manufacturing company. The Executive Vice President had warned the new GM that the senior managers were the most dysfunctional team he had ever seen, and the work environment on the floor was bordering on hostile.

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During the first quarter of his tenure he watched and learned. During the second quarter, he aligned people to the Core Values and getting the right people in the right positions. At the same time, he made a clear distinction of function between managers and leaders, thinking for the long-term. Not so subtly, he began to refer to the senior managers as the Leadership Team while beginning to raise the bar that every individual at the facility was a person of influence, thereby, making them a leader. Everyone had a role in leading the way into the future.

It was at this point that he brought us in and introduced us to his Leadership Team. We began to employ our tools focused on building a healthy organization (we utilize the equation: SMARTER + STRONGER = FASTER).

The GM quickly started applying SMARTER principles. Clear cut objectives, quarterly priorities, along with dedicated effort, and laser-focus business practices, all grounded in accountability, eventually moved the facility from a 50% on-time delivery to 100% on-time delivery in the first six months. But that was only a start, a STRONGER foundation needed to be laid.

We offered Kolbe as the “next step” in their personal and professional development and started with addressing specific challenges occurring between the GM and Plant Manager. The results were as follows:

<u>Title</u>	<u>FF</u>	<u>FT</u>	<u>QS</u>	<u>Im</u>
General Manager	7	4	7	3
Plant Manager	8	3	3	5

The Plant Manager (PM) was excellent in building relationships, developing people and teams. However, there were metrics that were slipping in the manufacturing process and the GM was concerned. We had each of them take their Kolbe A Profile and added a Kolbe B and C Indexes for the PM. Initially, it was tenuous because the PM thought his job was in jeopardy and Kolbe would be the tool used to let him go. After multiple facilitated conversations between he and the GM, he leaned into the process.

<u>Title</u>	<u>FF</u>	<u>FT</u>	<u>QS</u>	<u>Im</u>
Plant Manager A Index	8	3	3	5
Plant Manager B Index	5	6	5	6
Plant Manager C Index	6	9	6	1

The Kolbe B and C Indexes revealed both strain and tension. There was a difference in FF, and significant differences in FT, QS and Im.

In manufacturing, leaders have to carry the tension of following process as well as being nimble; like asking a few, appropriate questions and then acting to move things forward. Instead, this PM would ask multiple questions, over a long period of time and want to make tweaks in the process.

At one point of frustration, the GM actually said, “If the process doesn’t get changed, I will have no problem throwing a grenade into the mix, blow things up, and pick up

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the pieces. What we are doing now doesn't need tweaks." The PM didn't understand until we revealed the Kolbe results. After multiple coaching sessions between the GM and PM, it became clear that the personal strain of the PM along with the tension between PM and GM, was causing multiple issues. The A to A, A to B and A to C comparison reports, really helped in identifying better ways for the two to come together and work more effectively. We especially had many discussions and laughs over the phrase, "The worst thing you can do."

The GM recognized that the FT he was looking for (evidenced in the C Index) with regard to the role of the PM could actually be done by a couple of other people who had been identified as those who initiate action in FT. This relieved quite a bit of tension and strain with the PM and improved the working relationship between the two.

The company has expanded its Kolbe usage to all of the leaders of the senior leadership team.

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