



Nast Partners

Predict Performance

TALENT OPTIMIZATION:

Maximizing Your ROI (Return On Individuals)

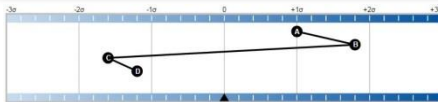


Greater Valley Forge
Human Resource Association

February 15, 2022



Dave Nast

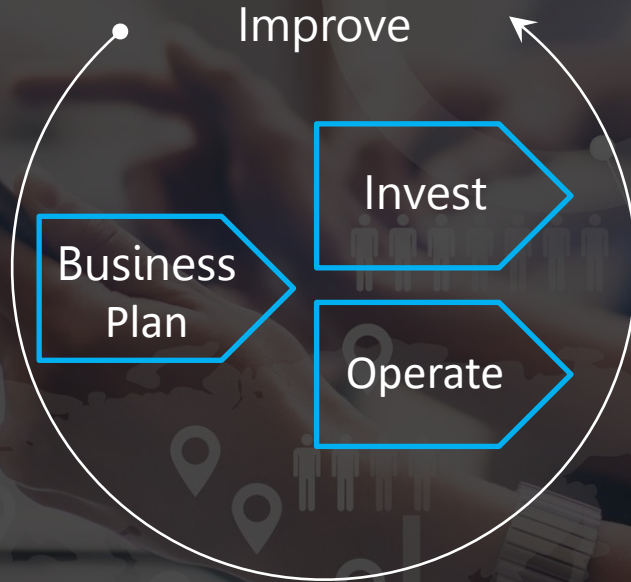


- Workplace Behavior Expert & Award-Winning Business Coach
- 30+ years of experience in Human Capital Management, Talent Optimization, Executive Coaching, Leadership Development, Talent Acquisition, Training, Executive Search, Talent Development, and Change Management
- Certified as a Talent Optimization Consultant, Workplace Behavioral Analyst, Business Coach, Corporate Trainer, Leadership Architect, Career Coach, Resume Writer, Interview Coach, Interview Architect, and Internet Recruiter
- Placed over 500 CEOs, Coached thousands of CEOs, Business Owners, and Executives
- 3-time CEO and Business Owner
- Top-Ranked Influencer on LinkedIn with over 25,000 followers
- Writes for Talent (TLNT.com), Raconteur, and the Business Section of The Huffington Post
- Featured in Money Magazine, Fortune Magazine, and Men's Health
- Collaborator on the #1 Best-Seller, The NEW ROI (Return on Individuals)

Business As Usual



Business Strategy

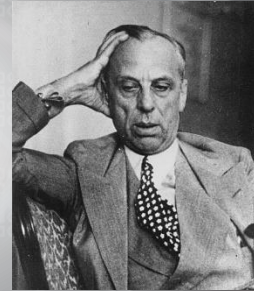


Business Results

Competitive Differentiators



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Access to capital



Operational excellence



Access to information



Product excellence





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Take-Aways



People = Investment



Analytics = Awareness



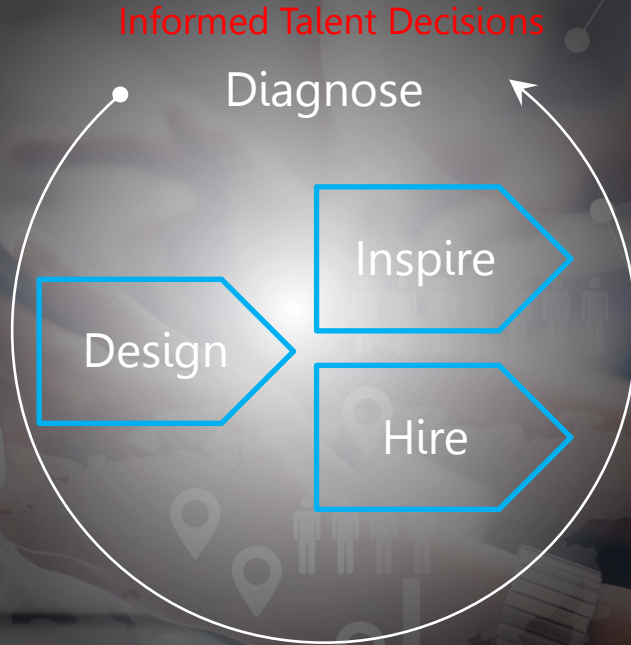
Predict Performance = Prevent Problems

Talent Optimization



Business Strategy

Every good business has a strategy that demands results. What stands between success and failure is in the hands of its people.



Business Results

Talent optimization provides business leaders with a framework and tools to design culture, roles, and teams that maximize business results.

Are you playing Checkers or Chess?



*“Average managers play checkers, while great managers play chess. The difference? **In checkers, all the pieces are uniform and move the same way**; they are interchangeable. You need to plan and coordinate their movements, certainly, but they all move the same, on parallel paths.*

***In chess, each type of piece moves in a different way**, and you can’t play if you don’t know how each piece moves. More important, you won’t win if you don’t think carefully about how you move the pieces.*

Great managers know and value and unique abilities and even the eccentricities of their employees, and they learn how best to integrate them into a coordinated plan of attack.”

—Marcus Buckingham

Workforce Analytics = People Data

How can we maximize the ROI (Return On Individuals)?



Valuation Data: **People**
are **Expenses** on the
Income Statement

89% of CEOs say that
their most valuable
Asset = their **People**

If **People** are the largest **Expense** and the most valuable
Asset, then People are THE most crucial **Investment** in
your business

Workforce Analytics = People Data



- How can we Predict Performance of Employees?
- ***What if we could...?***
 - Hire better and faster
 - Onboard and train faster
 - Reduce turnover and retain top talent longer
 - Identify Change-Agents
 - Define Benchmarks to find Alignment and ease operational friction
 - Get Discretionary Effort from employees
 - Uncover and mitigate Blind-spots
 - *Map Your Company's Genome* to prevent future problems
 - Design and navigate re-organizations
 - Take the guesswork out of Succession Planning
 - Smooth out The Transaction- M&A, Integrations, Buying & Selling

The Current Talent Landscape: Business Continuity

70% of CEO's state the biggest challenge facing their business today is ensuring they have the "right person in the right seat"...



Triage/Response:

- Tourniquet- stop the bleeding
- Too tight = gangrene
- Right-sizing
- Managing smaller workforce
- Scalpel vs Hatchet

The New Normal:

- Managing Remotely
- From .72 to 1.2
- 70% will change jobs in next 12 months
- 17 – 11 = 6 months
- The Great Resignation & the cost of turnover

Recovery:

- Redistribution of work
- Strategy alignment
- Engagement
- 12Q growth
- Covid fatigue
- Management by attrition: 31 vs 42

Why They Leave?

- 85% - Manager
- 10% - Money

"The grass is greener where you water it..."

The Predictive Index



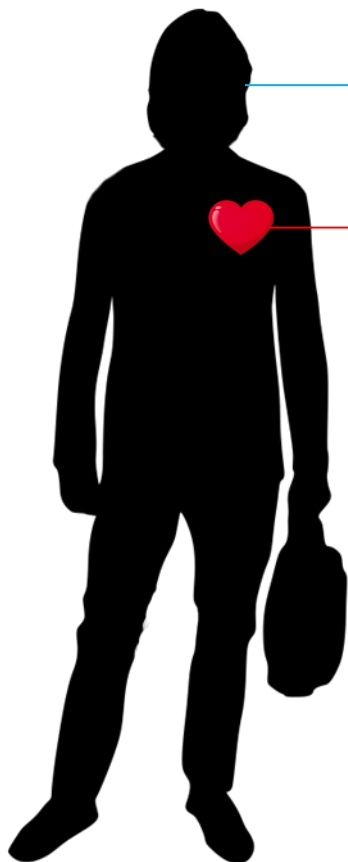
The Predictive Index has been in business for over 65 years, and our assessments are scientifically valid and reliable. Available in over 80 languages and **scientifically validated for use in hiring and selection.**

The Predictive Index assessments and recommended practices comply with:

- Equal Employment Opportunity Commission (EEOC)
- Uniform Guidelines for the Development and Use of Personnel Selection Procedures (1978)
- American Psychological Association (APA)
- Society for Industrial and Organizational Psychology (SIOP)
- International Test Commission (ITC)
- General Data Protection Regulations (GDPR)

All of our assessments are scientifically validated against populations large enough to be used for any job, in any industry, in any location worldwide.

Assess the “Whole” Person



HEAD

Behavioral drives &
Cognitive ability

HEART

Passions, Interests &
Shared beliefs

BRIEFCASE

Education, Knowledge,
Skills & Experience

Workplace Performance

When we look at our people, we think about the head, the heart and their briefcase.

We frequently put too much emphasis on the briefcase—factors like where they were educated, what other jobs they’ve had.

We don’t spend enough time understanding what makes them tick.

The sad reality is that often people are **hired for what they know** and **fired for who they are**.



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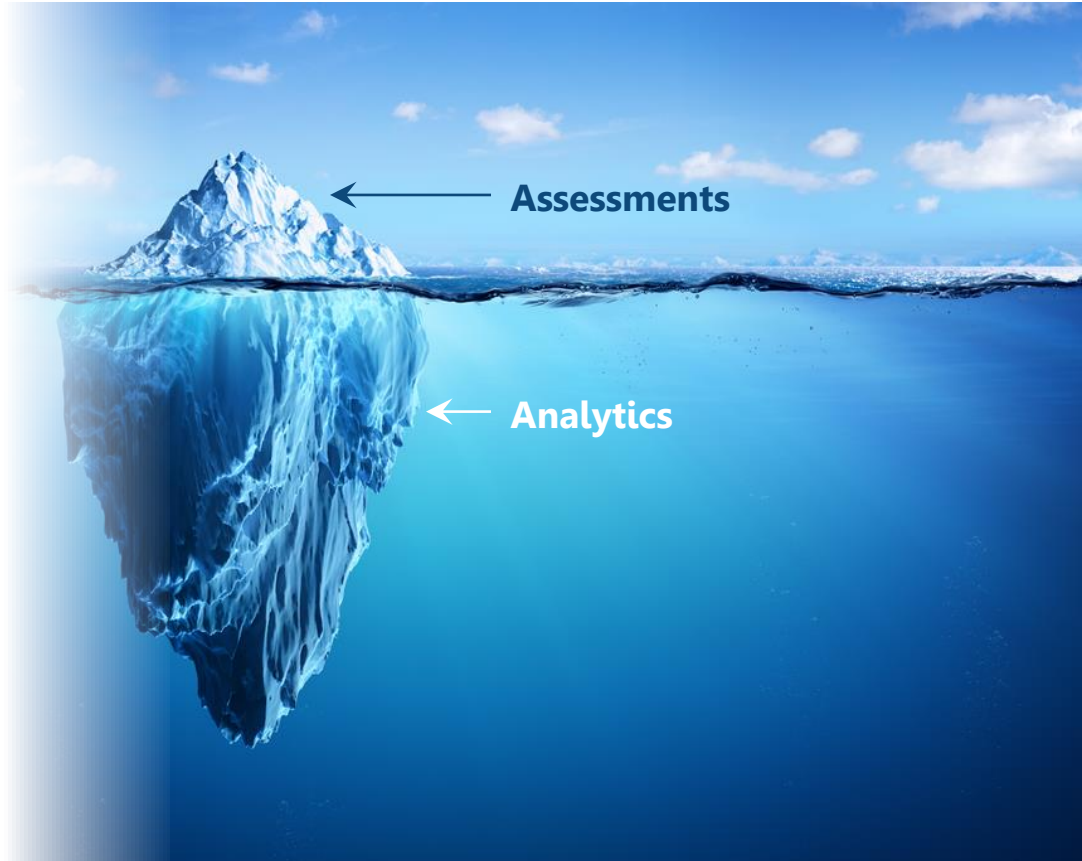
Not Scalable



Analytics vs Assessments

Not just observable behavior...

But what **DRIVES** the behavior...



How do you predict behavior?

People have
DRIVES

Drives create
NEEDS

Response to needs
BEHAVIORS

Working Late: People can **masquerade**

Driven by **precision**

Driven to **win**

Driven by **perception**



What Drives Behavior



Dominance:

The drive to exert one's influence on people or events



Extraversion:

The drive for social interaction with other people



Patience:

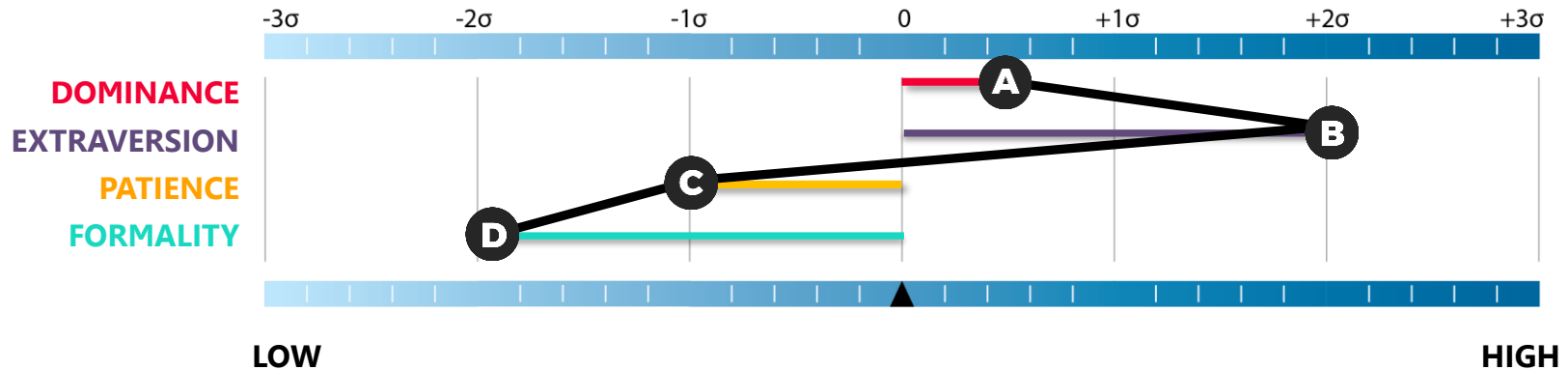
The drive for consistency and stability



Formality:

The drive to conform to rules and structure

Reading a Behavioral Pattern



Dominance



Low A

Needs

High A

"Allow me to include others."

"Let me put my mark on the idea."

Low A

Behaviors

High A

Deferential

Supportive

Determined

Assertive

Extraversion



Low B

Needs

High B

"Give me time to think it through."

"Let me discuss with others."

Low B

Behaviors

High B

Private

Reflective

Sociable

Influential

Patience



Low C

Needs

High C

"I am comfortable with pressure and change."

"I am comfortable with familiarity."

Low C

Behaviors

High C

Intense

Prompt

Composed

Habitual

Formality



Low D

Needs

High D

"Don't confine me to rules and structure."

"Give me structure and framework."

Low D

Behaviors

High D

Spontaneous

Flexible

Diligent

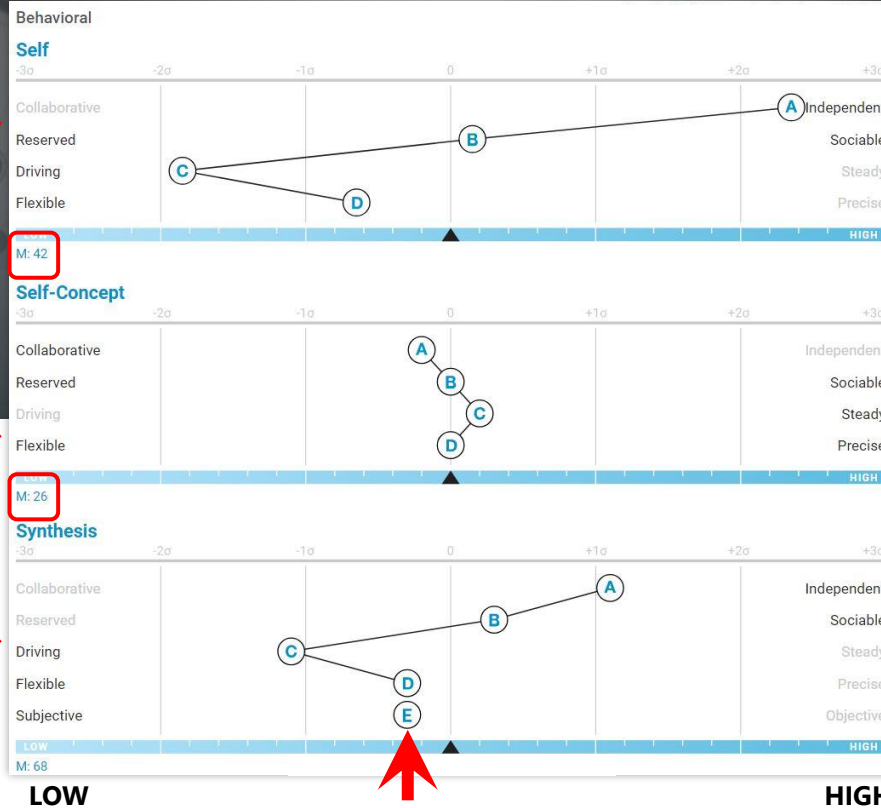
Structured

Understanding Workforce Analytics Data/Patterns



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Predictive Analytics

Self: One's Natural Style/DNA



Stable over time

Self-Concept: How one perceives they need to adapt to their current work environment

Changes each time you take it- *The Finger On The Pulse of your workforce*

Synthesis: How one is seen

How they are showing up

E: Independent Measure- How we make decisions (Objective vs Subjective)

Three key dimensions for any role



STYLE

Is it critical that the person in this role understand people more or tasks/process more?



PACE

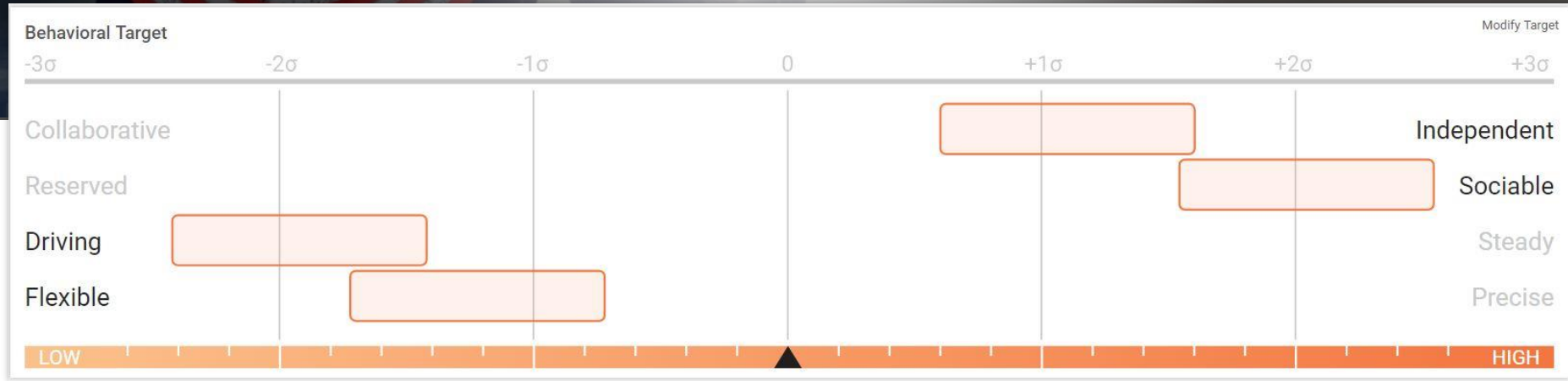
Does the job require dropping work to address surprises, or is time predictable and largely controllable?



RISK

Does one take risks in this role, keep an eye out for risk, or avoid risks? Is one accountable for results or activities?

Job Target



Job Assessment

Shape job to behavioral requirements



PRO®

Instructions

Page 1

Page 2

Page 3

☐ Checking the details of work for accuracy

☐ Working at a consistent and steady pace

☐ Meeting scheduled deadlines

☐ Making major decisions independently

☐ Being calm and patient at all times

☐ Carrying out instructions carefully

☐ Developing friendly personal relations with others

☐ Establishing priorities for the activities of others

☐ Collecting and analyzing data

☐ Checking to ensure that work meets quality standards

☐ Solving new or unfamiliar problems

☐ Handling repetitive work without becoming impatient

☐ Assuring compliance with laws and company policies and regulations

☐ Cooperating with team or committee decisions

☐ Being responsible for security of company property

☐ Providing services, support or information by telephone

☐ Maintaining a consistent work pace for long periods

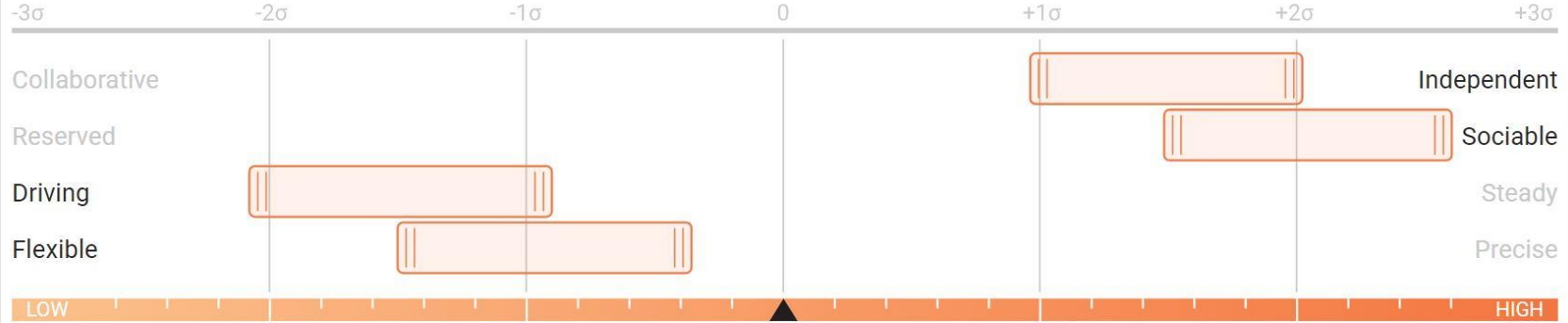
☐ Being responsible for a number of varied activities

The Job Target/Benchmark Tool

Review Job Target | Sales

How do I modify this target?

Behavioral Target

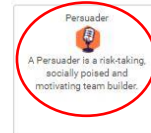


Contributors To Include

✓	Name	Reference Profile	Pattern	Type
✓	Clark Kent			Assessment
✓	Bruce Wayne			Assessment
✓	Diana Prince			Assessment
✓	Barry Allen			Assessment

ADD MORE CONTRIBUTORS

Reference Profile(s) Matching This Target



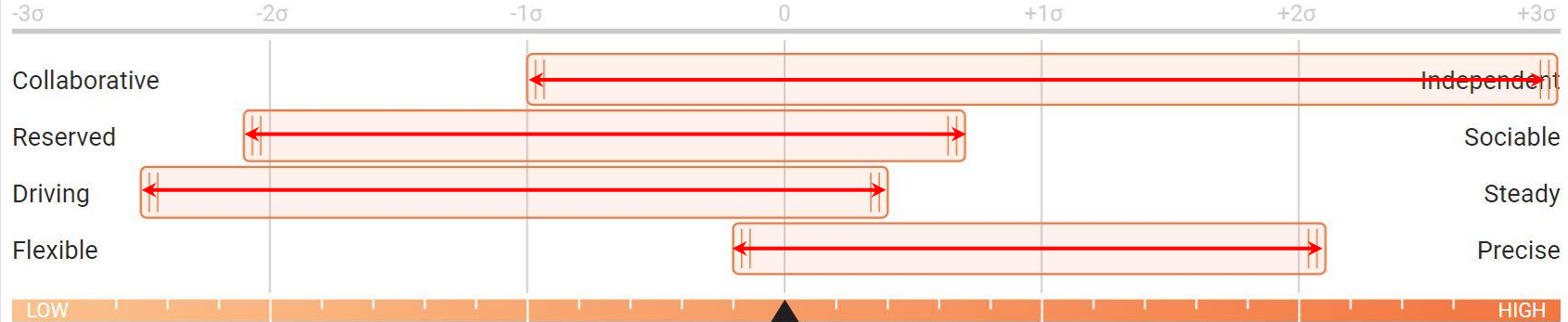
Looking for Alignment

Creating The Job Target

Review Job Target | Maintenance Engineer

How do I modify this target?

Behavioral Target



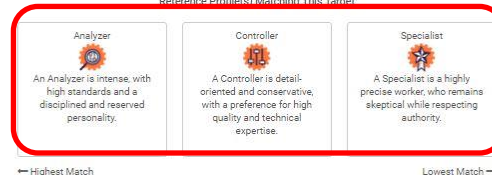
Contributors To Include

✓	Name	Reference Profile	Pattern	Type
✓	Tony Stark			Assessment
✓	Steve Rodgers			Assessment
✓	Peter Parker			Assessment
✓	Bruce Banner			Assessment

ADD MORE CONTRIBUTORS

Out of Alignment

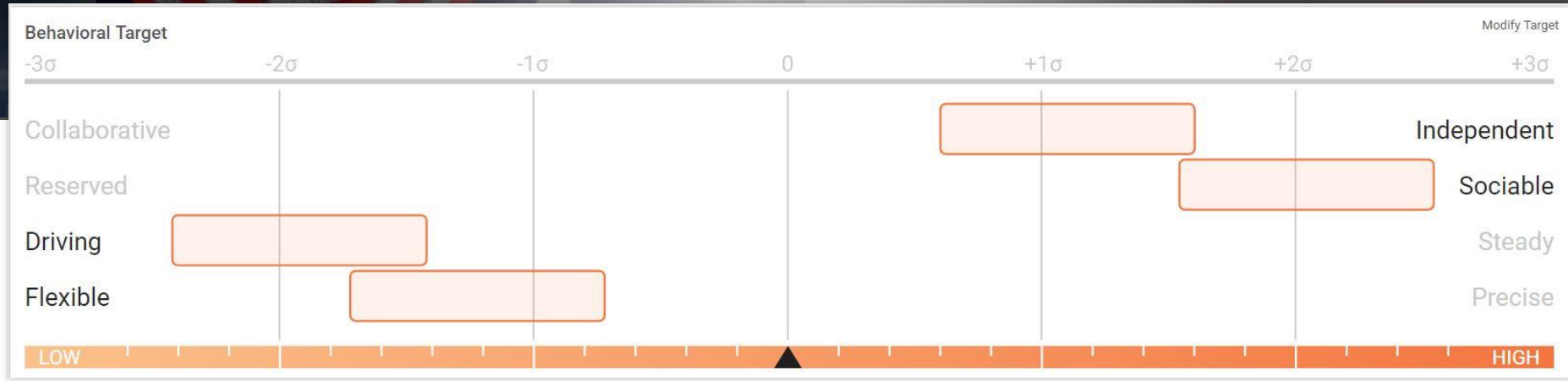
Reference Profile(s) Matching This Target



← Highest Match

Lowest Match →

Job Target



Job Target Report

Job Target Profile



Associate

LOOKING FOR



Persuader
A Persuader is a risk-taking, socially poised and motivating team builder.
[Learn More](#)



Captain
A Captain is a problem solver who likes change and innovation while controlling the big picture.
[Learn More](#)



Maverick
A Maverick is an innovative, "outside the box" thinker, who is undaunted by failure.
[Learn More](#)

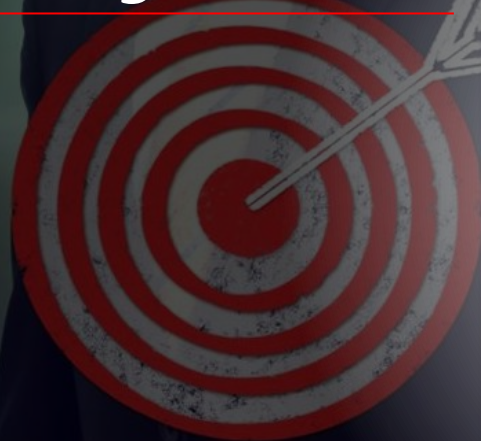
THEY

Will be	Will need
Intense	Variety
Restless	<u>Opportunities to work at a faster than average pace</u>
<u>Driving</u>	Mobility
Will Like Hearing	
Lead the conversation	
<u>Explore new frontiers</u>	
<u>Manage multiple priorities</u>	
<u>Take the Initiative</u>	

NOTEWORTHY BEHAVIORS

<u>Quick to connect</u>	Proactive
Fluent	<u>Takes Initiative</u>
Fast-talking	Competitive
Lively	<u>Driven to get things done</u>
Enthusiastic	<u>Positive response to pressure</u>

Job Target Profile



SUMMARY

The focus of this job is making connections with people, motivating and inspiring them to achieve results. Poise and an engaging, empathetic communication style based on natural warmth and enthusiasm is the key to achieving the goals of this job. The work involves driving toward results by enrolling the commitment and buy-in of others. While the job requires strong initiative and self-direction, results are only achieved with and through people. A sincere appreciation for people and how they are each uniquely motivated is the foundation for designing and implementing interactive communication and decision-making processes. Knowledge and skill in how to successfully influence and persuade others by understanding how their individual needs and motivations link to goals is essential. The job requires a high degree of "selling", whether of ideas and policies within the organization, or products or services in the marketplace. The job environment is fast paced and results oriented. While there is urgency to goal achievement, responsibility for the achievement of results needs to be shared and effectively delegated when necessary. Initiating projects and processes beyond established organization practices will often require training and developing others, and enlisting their support by using a "selling" rather "telling" communication style. A self-confident, extroverted style that can enliven, engage and positively impact individuals and groups is essential. The job has variety of tasks and is dynamic and changing. Because goals and desired results can quickly change, the job requires regularly meeting and pro-actively establishing relationships with new groups. The ability to understand, quickly react and motivate others to adapt to the changing organization environment is a critical key to success. In general, the core of this position requires a motivated and motivating team builder and organization developer.

JOB CHARACTERISTICS

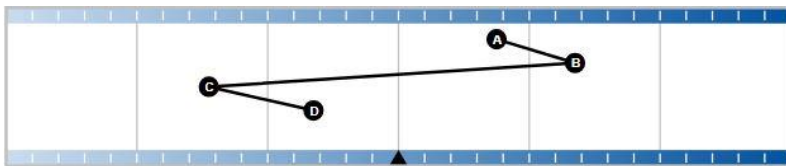
Variety of activities Multiple projects occurring simultaneously Multi-tasking Sense of urgency for goal achievement Fast-paced environment. People/relationships focus Team building Inspire, motivate others, and engage their commitment. Involve others in decision-making process Cooperative, collaborative decision-making Must assume responsibility for risk. Extroverted, warm, enthusiastic, empathetic Stimulating communicator Persuasive "selling" style Collaborative approach. Leadership based on ability to motivate others Strong commitment to results Delegate authority readily.

For PI Masters

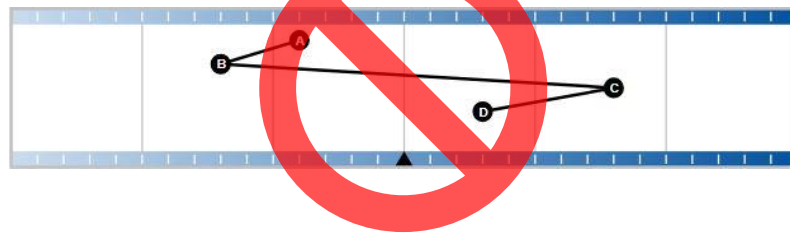


Job Target

Attract

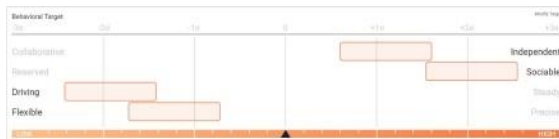


Repel

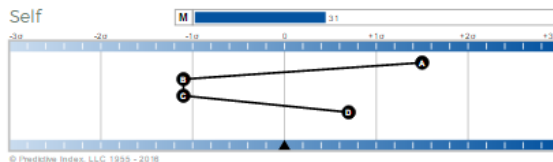


Match a PI to the Job Target for a custom Competency-Based Interview Guide

Sales Rep



Bruce Wayne



Factors Comparison

	A	B	C	D
Match 	✓	?	✓	?

Interview Questions

(A) DOMINANCE ✓

Describe a situation when you were asked to deliver a tangible result.

Tell me about a time when you initiated something new.

(B) EXTRAVERSION ?

Tell me about an experience when you were required to solve a problem by working closely with others.

Describe a situation when you needed to influence the decision of others.

(C) PATIENCE ✓

Describe a situation when you had to accomplish multiple objectives under a tight timeline.

Share an example of how you have performed under pressure.

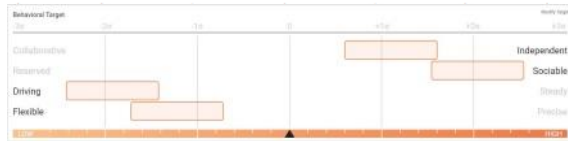
(D) FORMALITY ?

Describe an experience where you needed to be extremely flexible.

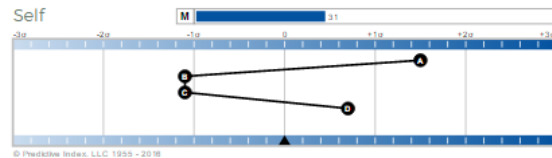
Share your experience when unplanned changes are required.

Match a PI to the Job Target for a custom **Coaching Guide** to ensure top performance, faster onboarding, & better promotions

Sales Rep



Bruce Wayne



Factors Comparison

	A	B	C	D
Match 	✓	?	✓	?

Coaching Questions

(A) DOMINANCE ✓

How can you leverage your ability to take charge and lead a team?

What could you do to take advantage of your natural tendency to be proactive?

In what ways could you produce even better results than you are currently?

(B) EXTRAVERSION ?

What could you do to better recognize and understand the viewpoints of others?

What needs to happen for you to be more vocal with your point of view?

How could you demonstrate a greater ability to communicate persuasively with others?

(C) PATIENCE ✓

How could you bring out more of your drive to work at a rapid pace and make things happen?

What would it look like to increase your sense of urgency in order to impact your overall results?

How could you leverage your ability to work on multiple priorities effectively?

(D) FORMALITY ?

How could you become more open to new ideas rather than the established

What else do workforce analytics measure?

- **Perception of Risk:** risk equals opportunity or need to mitigate risk
- **Decision Making:** quickly/easily or carefully/cautiously
- **Need for Rules and Processes:** minimal need or needs clarity around rules
- **Response to Pressure:** thrives under pressure or tentative/with caution
- **Taking Action:** proactive or responsive
- **Adapting to Change:** adapts easily or takes time
- **Communication:** direct to the point or empathetic/social
- **Delegating:** authority and/or details- finds it hard or delegates easily
- **Decision Making:** objective (based on data/facts/logic) or subjective (based on gut/intuition)

CONNECTION
ANALYSIS
DATA
SEARCHING
VERIFICATION
CODING
SENDING



**Don't accommodate
differences.**

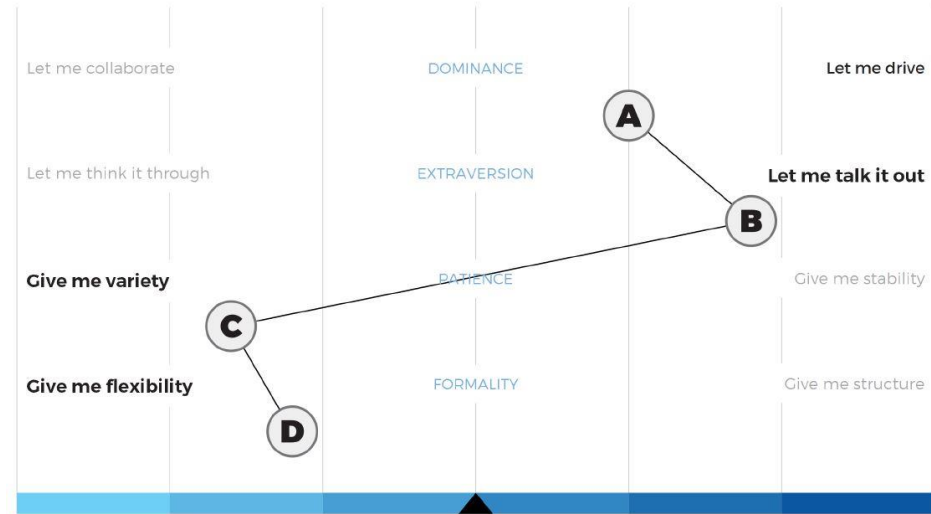


Leverage them.

- Increase **ROI** – Return on Individuals
- Move People from Liabilities to **Assets**
- Realize **Discretionary Effort**

Using The Placard

How to Interact with **DAVID NAST**



What type of leader do you need?



START UP

Entrepreneurial Drive
Push Change
Compete



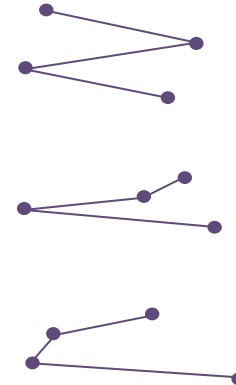
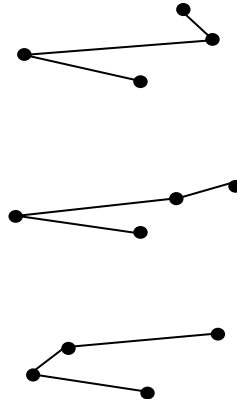
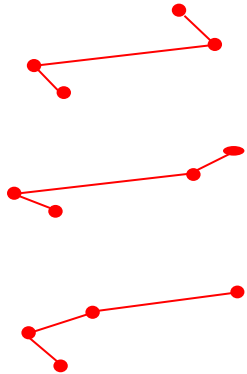
RAPID GROWTH

Organization Building While Multi-Tasking
Tension Between Democratic/Participative vs.
Autocratic/Entrepreneurial



MATURITY

Expert Maintenance
Process Control
Task Management



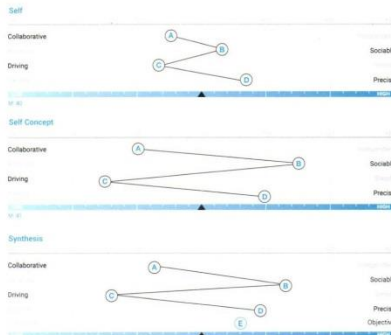
Case Study: Who would you hire and why?

Client Relationship Banker



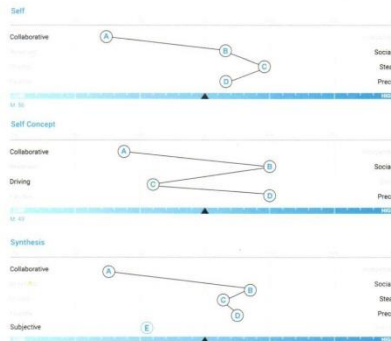
Candidate 1: Eric Mahone

Eric has no banking experience, but was drawn to the description of the Client Relationship Banker. He has most recently been working for a very high-end retailer selling men's clothing. He won the Customer Service Excellence award for his company two years in a row and is very proud of this achievement. He takes pride when everything is done correctly and always follows up with his personal clients, sending them notifications about upcoming sales and products he thinks they might enjoy. He has never been in a role where he had to handle a lot of cash, and blushed a bit when asked how much he knew about financial planning. He has no understanding of the financial industry, but is certain that if he was given the opportunity and the proper training, he would excel.



Candidate 2: Courtney Davidson

Courtney has over 4 years of banking experience working for a competitor of Oshkosh Bank. She started as a wire clerk, transferring funds between banks, and then moved quickly to a bank teller role. During her interview she stated that she takes a lot of pride in the fact that she is accurate, and that her reviews and audits have been outstanding. She has recently been acting in more of a sales capacity at the bank, helping the mortgage group while one of their team members has been out on maternity leave. She has enjoyed the experience so much that she is seeking a job where she could continue in a sales role.



Candidate 3: Tom Hadfield

Tom has worked at Oshkosh Bank for the last 3 years. He started as a call center representative and then moved into a support role answering the phones and helping customers with technical issues using Oshkosh Online Banking. During the recent rollout of the new Oshkosh Banking App, Tom played a major role in ensuring that the App worked as it should, writing the test scripts and carefully documenting the test results. Tom's manager recently moved Tom into a more customer-facing role, and he was making strides every day. Tom's manager thought that the move to Client Relationship Banker could give Tom more exposure to banking products and could provide the experience he needs to move to the next level.



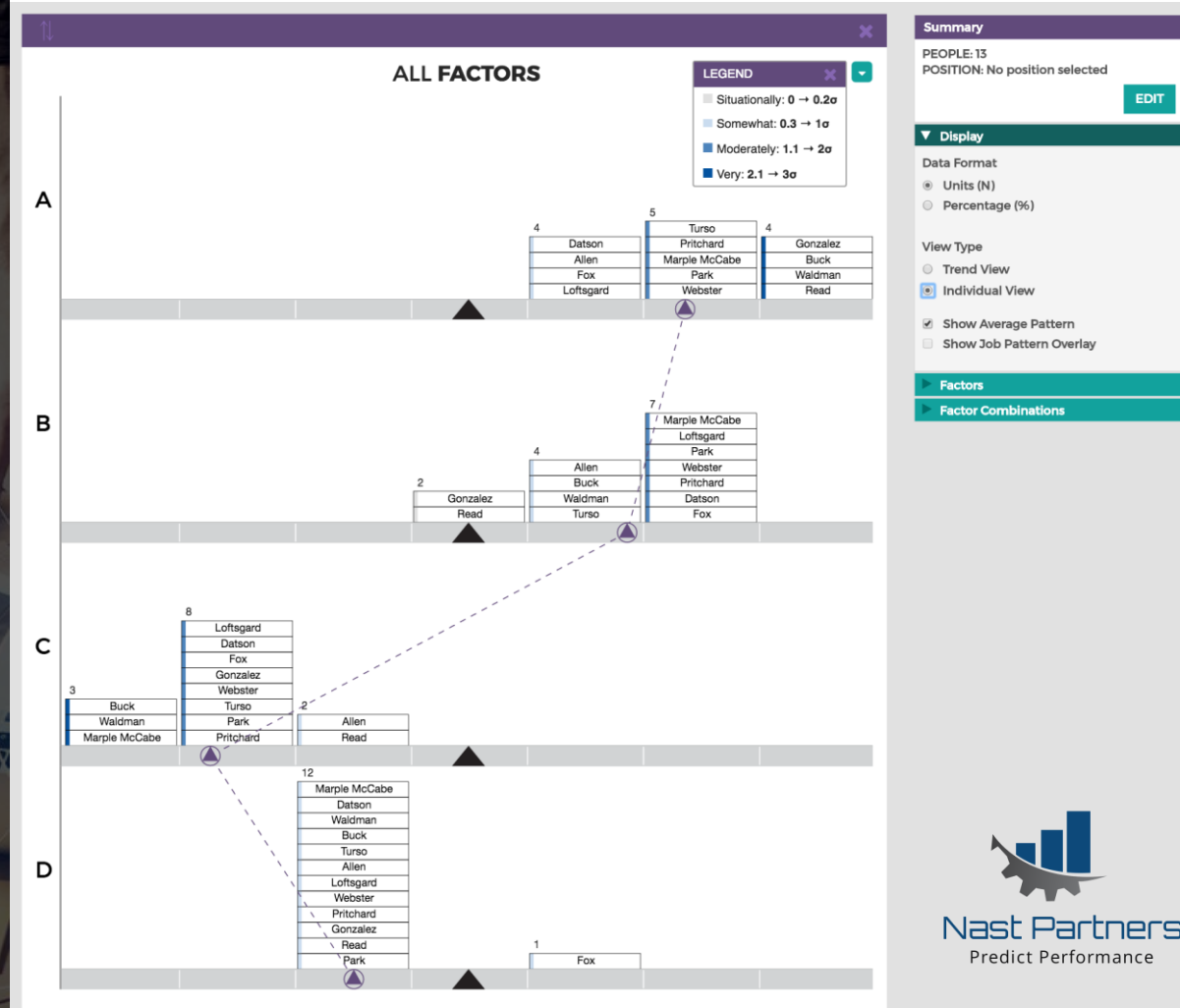
You are the Hiring Manager at Oshkosh Bank looking for a new Client Relationship Banker...



*See how your team's behaviors work
together with Group Analytics™*

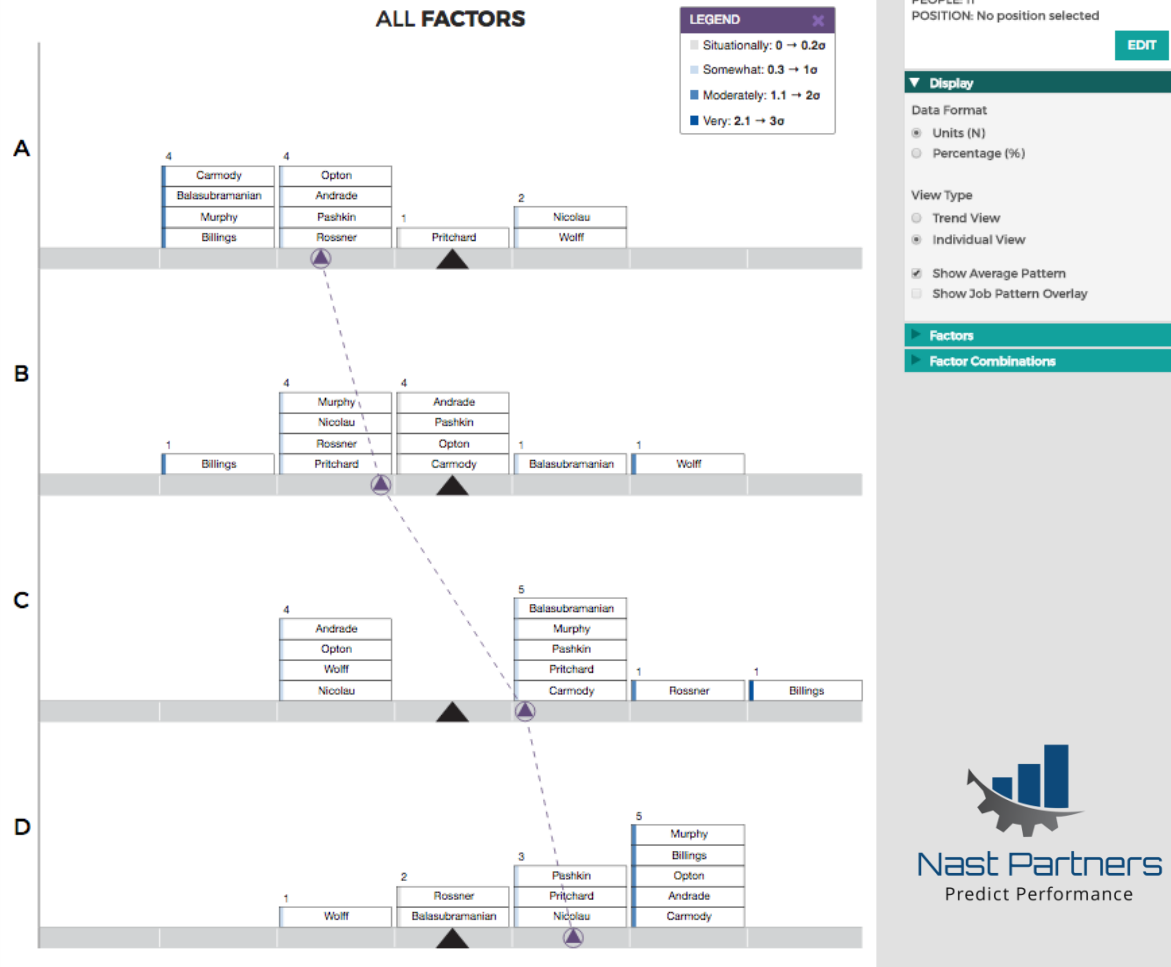
Sales Team

- Goal oriented
- Proactive and driven
- Forward thinking and strategic
- Fast paced, quick to change
- Direct in communication
- Fast decision making
- Freedom from structure

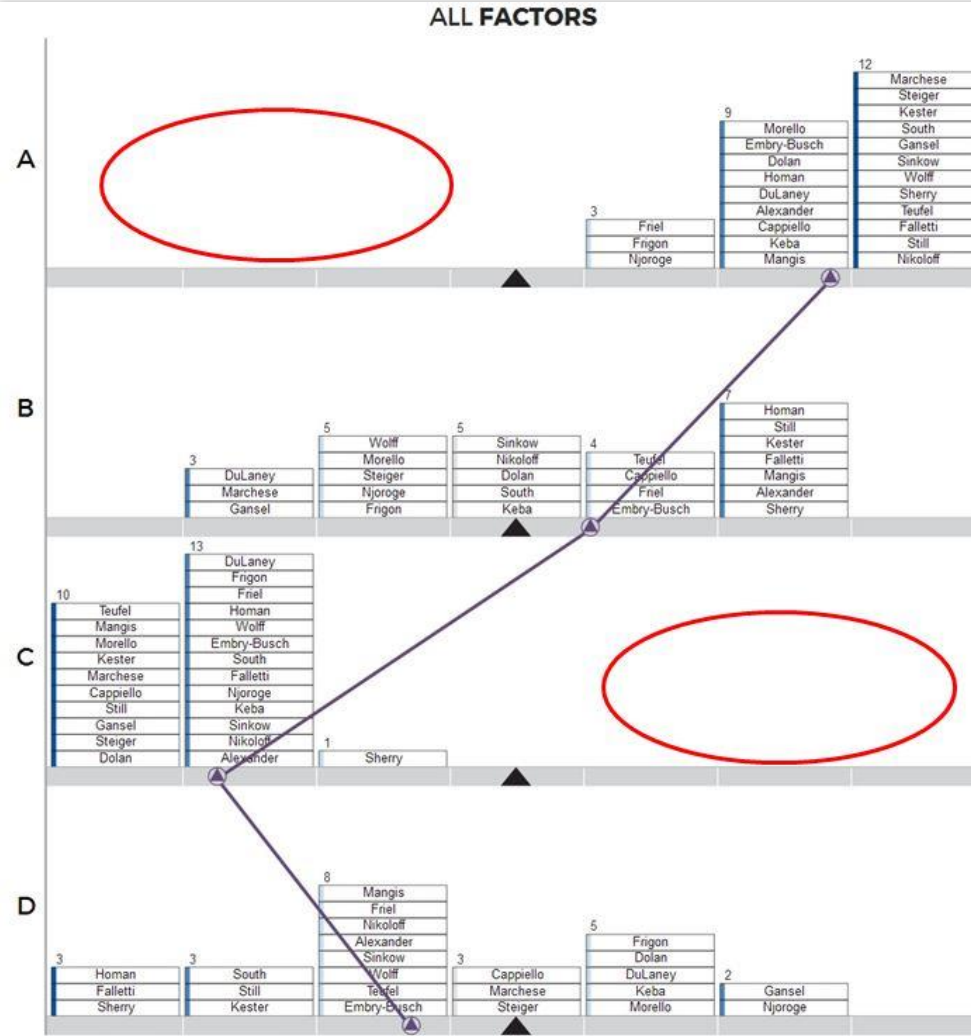


Senior Team: At a Hospital

- Risk averse
- Careful and cautious
- Steady approach to change
- One thing at a time
- Compliance driven
- Focused on protecting hospital from risk

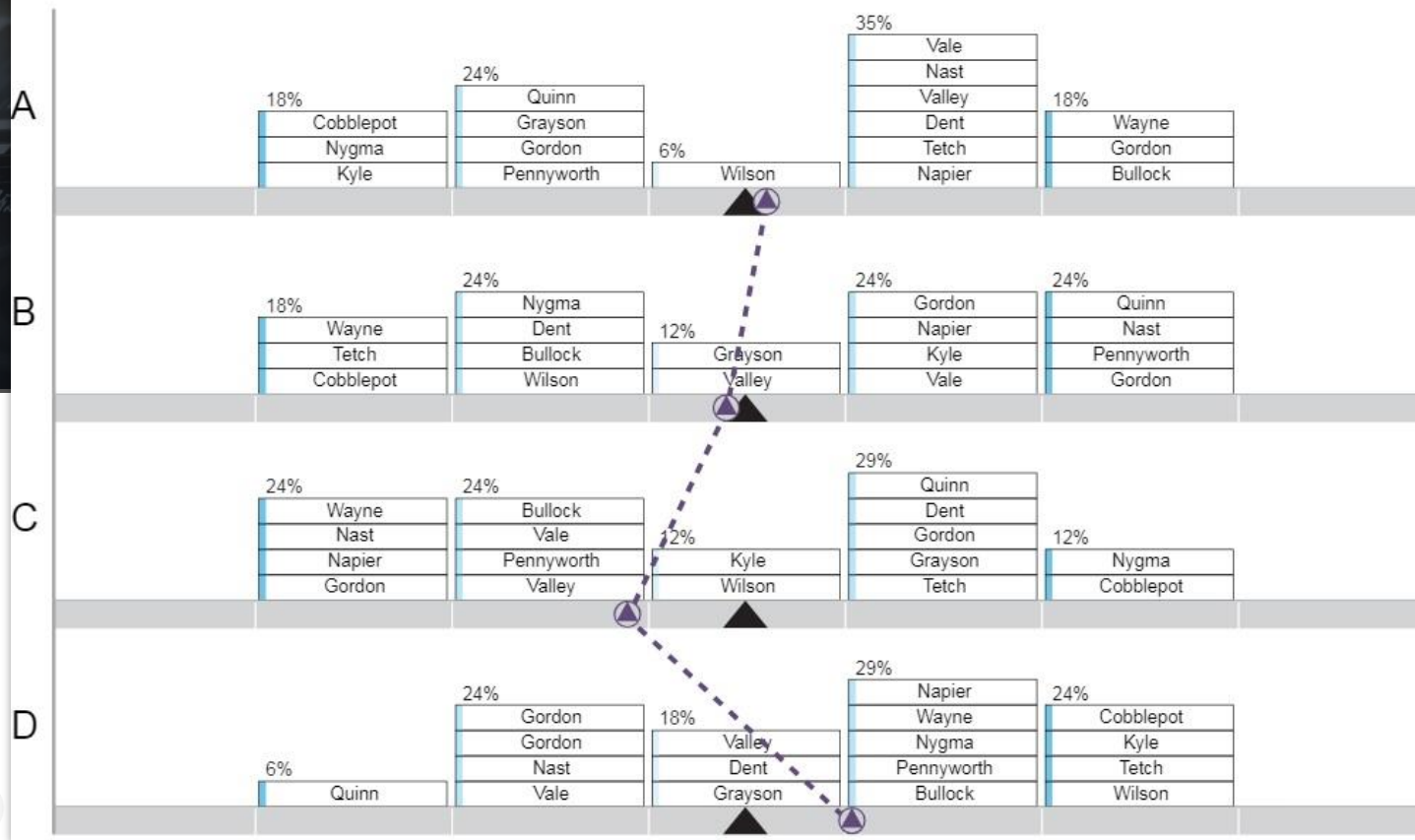


Group Analytics: Identify Blind-Spots on your Team



Group Analytics

ALL FACTORS



Group Analytics - Strategy Insights

Team Work Styles

Uncover how a Team of People will interact and perform.

Overall

For PI Masters

Add/Remove



Team Styles Overview



Strategy Insights

From the activities below, select the 5-8 activities that are most critical to the success of your current business strategy.

Innovation & Agility

- ☒ Increasing agility
- ☐ Developing new products
- ☒ Taking actions
- ☒ Growing rapidly
- ☒ Implementing change

Teamwork & Employee Experience

- ☒ Increasing team cohesion
- ☐ Fostering teamwork
- ☐ Developing employees
- ☐ Empowering employees
- ☐ Increasing employee loyalty

Process & Precision

- ☐ Enforcing standards and rules
- ☐ Increasing accountability
- ☐ Increasing predictability
- ☒ Increasing efficiency
- ☐ Increasing reliability

Results & Discipline

- ☐ Maximizing profitability
- ☒ Delivering results
- ☐ Improving competitive position
- ☐ Increasing market share
- ☐ Increasing speed



CERTIFIED
PARTNER

Group Analytics - Team Work Styles

Team Work Styles

Uncover how a Team of People will interact and perform.

Overall Communication Taking Action Decision Making

[Generate Report](#)

 For PI Masters

[Add/Remove](#)



Team Styles Overview Strategy Insights

Innovation & Agility

Driven by their vision and readiness to risk it all, teams make their mark with their entrepreneurial spirit and creative problem-solving.

Strengths

- Ambitious and goal-oriented
- Connect with people quickly and easily
- Quickly adapt to change and thrive under pressure

Cautions

- May be impatient to move or see results
- May have little concern about details
- May not take the time to listen closely, focusing more on the action to take

Tips

- Provide team with opportunities to tackle challenges
- Don't micromanage, give space to put a plan into action and see results
- Ask specific questions about plans to confirm that details are being considered

Teamwork & Employee Experience

Powered by their shared values and commitment, teams approach and overcome challenges through teamwork, cohesion, and joint participation.

Process & Precision

Engineered to maximize efficiency and consistency, teams fill the gaps, stabilize organizations, and function like a finely-tuned machine.

Results & Discipline

Driven to deliver results, teams keep an analytical eye on the path ahead and hold the ground they have gained.

Group Analytics - Communication

Team Work Styles

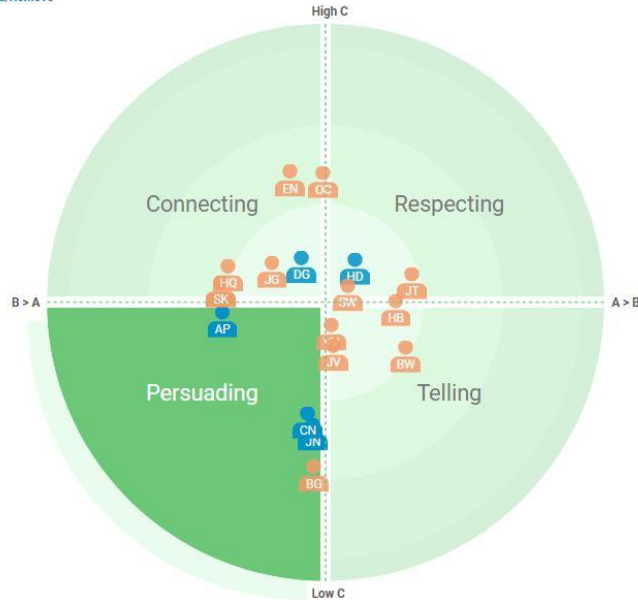
Uncover how a Team of People will interact and perform.

Overall **Communication** Taking Action Decision Making

[Generate Report](#)

For PI Masters

[Add/Remove](#)



Team Styles Overview

Respecting

Based around pleasant yet professional interactions, the Respecting style is about having a strong point of view but still respecting and acknowledging others perspectives. People want to be heard but not at the expense of the relationship.

Connecting

Caring for people and their feelings, the Connecting style is about putting people at the center of communications through interpersonal sensitivity and genuine relationship-building.

Persuading

Talking fast with enthusiasm and energy, the Persuading style has a socially outgoing approach that is geared towards influencing others, building networks, and gaining support.

Strengths

- Articulate and enthusiastic communicators
- Can quickly establish rapport
- Motivational and persuasive

Cautions

- May listen just to preserve the relationship
- May not take no for an answer, wanting to win you over to their view
- May rush the conversation or switch topics quickly

Tips

- Let them communicate ideas in a social, collaborative setting
- Lead with the headline and communicate how a task is connected to goals
- Remind them to listen to other ideas and opinions

Telling

Opinions will be loud and fast coming; the Telling style is about being assertive and to the point and then moving on to the next topic of interest quickly.

Group Analytics - Taking Action

Team Work Styles

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Overall

Communication

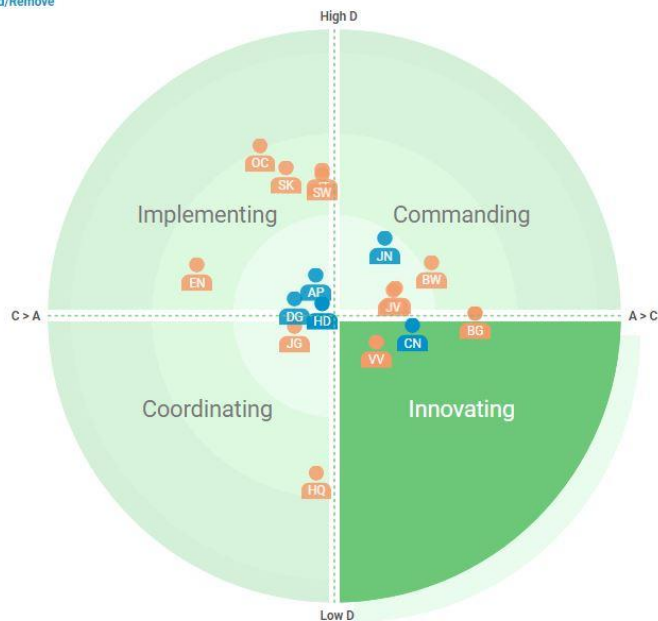
Taking Action

Decision Making

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 For PI Masters

 Add/Remove



Team Styles Overview

Commanding

There is a right way to do things; the Commanding Action style is about having strong opinions about how work should get done and making sure it is carried out in a specific way.

Implementing

Process and procedure have a place; the Implementing Action style is about being methodical, detail-oriented, and structured in the approach to getting things done.

Coordinating

Things get done when everyone is onboard; the Coordinating style is about using informal relationships and genuine care to bring people together and get them aligned toward action.

Innovating

Challenging the status quo, the Innovating style is about being fast-paced and willing to take charge and try things in new and unique ways

Strengths

- Take initiative and thrive under pressure
- Adapt easily and can be flexible in their approach
- Enjoy risk and uncertainty

Cautions

- May value their own, individual judgement more than others
- May be more concerned with achieving goals than in the details
- May not be concerned with following rules or processes

Tips

- Limit guardrails to let them excel on fast-moving projects
- Provide opportunities delegate the process and details to other team members (Commanding or Implementing) when possible.
- Be clear about when rules need to be followed and build in mechanisms to ensure follow through

Group Analytics - Decision Making

Team Work Styles

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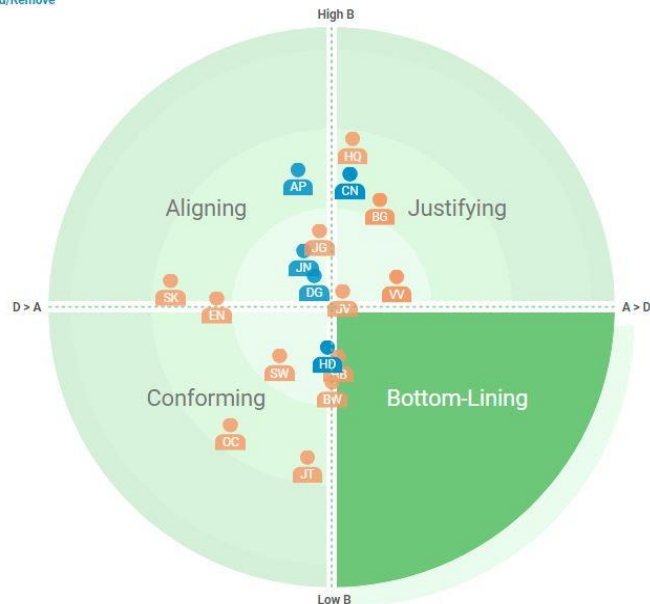
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Team Styles Overview

Justifying

Everyone has an opinion and there is no shame in sharing it; the Justifying style is an approach where people confidently and vocally challenge the status quo and each other to arrive at the best decision.

Aligning

Let's talk it through and consider the options; the Aligning style is about purposeful collaboration where opinions and alignment are sought in order to make a decision that all can get behind.

Conforming

The best way is the correct one; the Conforming Style is one where people independently make decisions and do so with a focus on the rules and processes that have already been established.

Bottom-Lining

After a lot of thought, there is one way to do things; the Bottom-Lining style approach is about independently evaluating options and making clear decisions without the need to follow previously defined structure or rules.

Strengths

- Able to consider unexpected and creative alternatives and weigh their outcomes when making decisions
- Autonomous problem solvers who are comfortable taking risks
- Analytical, technical orientation

Cautions

- May decide and announce their decisions, rather than seeking input from others
- May politely listen to other ideas, but will likely make decisions based on their own priorities
- May dominate the conversation or move forward without consideration of others

Tips

- Provide direction on whom they should collaborate with before making decisions
- Build in mechanisms to evaluate and course correct the risks they take when making decisions
- If your team is dominated by Bottom-Lining team members, consider how to give voice to non-Justifying team members, particularly those that are Aligning or Conforming

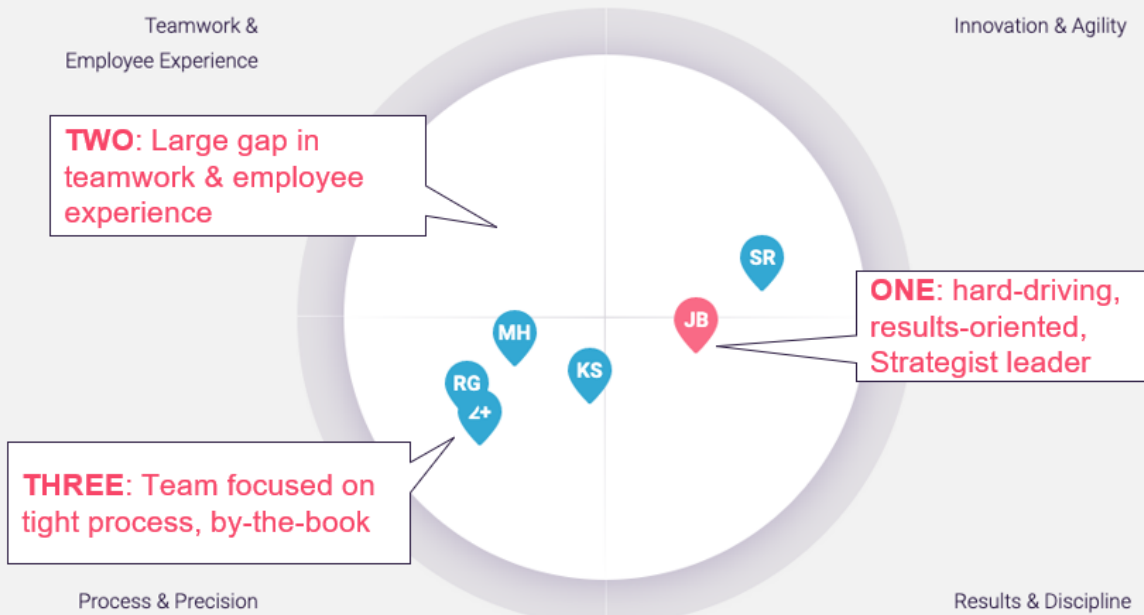
EXAMPLE

Manufacturing

(Production Management Team)

Situation: Turnover

- 66% turnover
- Constant revolving door
- Employees leaving for \$1 more
- Brand/reputation suffering
- Production quality suffering
- Friction on team
- Losing \$1.5M dollars annually



Group Analytics

Top Strategic Priorities

Teamwork & Employee Experience

Promote from within to foster a culture of engagement and professional development.

Increase team cohesion in order to improve team-level outcomes.

Increase employee engagement to improve productivity and retention.

Drive employees to achieve results with vision and passion.

Improve our employees' loyalty and faith in the company.

Innovation & Agility

Foster and cultivate creativity or a new vision for the company.

Determine how best to commercialize our new ideas or inventions.

Create or redefine our company's brand and perception in the market.

Launch a new line of products or services that have never been done before.

Set up a new team or department that will help expand our business.

Process & Precision

Implement new systems or processes.

Implement structures or procedures to handle the needs of our growing workforce.

Increase reliability of production or services to help avoid costly disruptions or delays.

Cut down on waste and improve efficiency in our work to help improve the bottom line.

Improve forecast accuracy to help inform long-term planning and budgeting.

Results & Discipline

Invest in our sales team or marketing team to help grow revenue.

Develop new pricing or distribution options that will appeal to customers.

Outmaneuver our competitors and be the first to the field.

Drive market share with data-backed decisions and discipline.

Drive growth through increased sales or improved customer retention.

Group Analytics

EXAMPLE

Manufacturing

(Production Management Team)

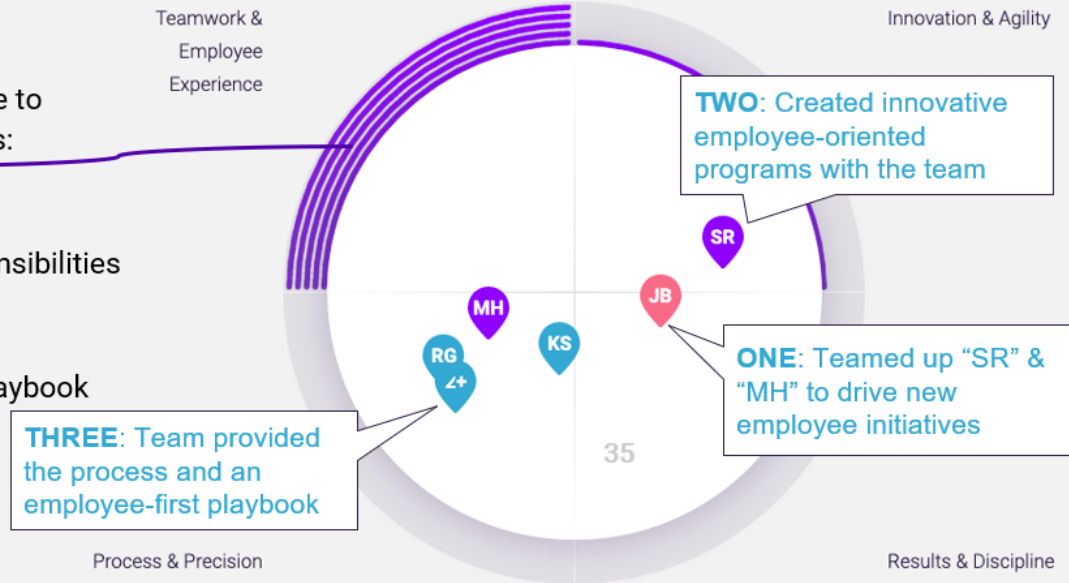
With talent optimization they were able to quickly identify their strategic priorities:

Changes:

- Assigned "SR" & "MH" new responsibilities
- Created employee-first protocols
- Tapped team's strengths
- Team built a new engagement playbook

Results (9 months in):

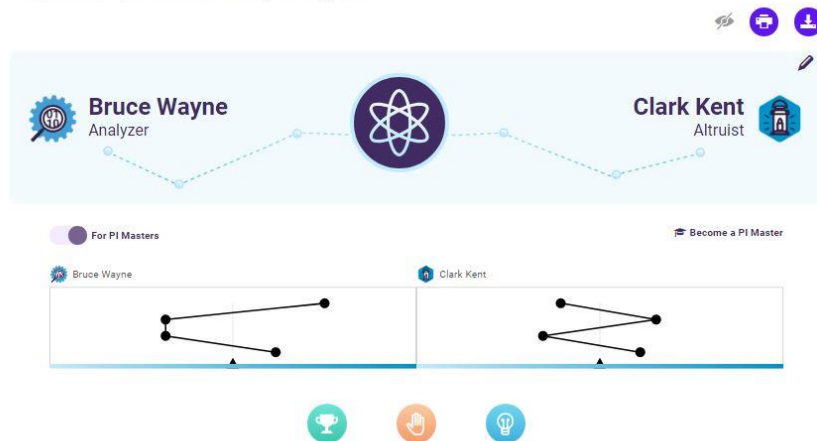
- Reduced attrition by 50%
- Production up 20%
- Reduced onboarding expenses
- Winning employees from competition
- 10X return on talent optimization investment



Relationship Guide

Relationship Guide

Compare two people to discover how they work together.



Relationship Strengths

Bruce can help Clark by supporting their ideas and creating a unified front when communicating Clark's perspective to other stakeholders.

Clark is eager to start conversations and will typically be the communication initiator with Bruce.

Bruce and Clark take a transactive approach to communication, quickly getting to the point, and moving on to the next topic.

Bruce and Clark communicate primarily in a detailed and transactional manner at work, exchanging information to keep work moving forward.

Relationship Cautions

Bruce may dominate the agenda, and Clark's ideas or concerns may get overlooked.

Bruce may be overwhelmed by Clark's eagerness to have a conversation, and Bruce may politely seek to shorten or avoid interactions with Clark.

Bruce and Clark may have difficulty moving a conversation forward constructively when they do not agree with each other or when they are both indecisive.

Communication between Bruce and Clark may falter if they become too focused on their individual work.

Relationship Tips

Bruce may be the one who tends to set the agenda, but Bruce should make sure to let Clark have their say, pausing to ask Clark for reactions or feedback, as well as giving credit and acknowledging when Clark has a great idea or suggestion.

Clark should set up a time to speak with Bruce rather than dropping by and asking Bruce questions spur of the moment, but Bruce should also make the effort to ask Clark for feedback or opinions.

Bruce and Clark should be sure not to talk past each other, and they should try to self-regulate to make sure the other person understands what they are trying to say.

Bruce and Clark should also take care to respect each other's areas of control and expertise.

Reference Profiles



SOCIAL PROFILES

Persuader

A Persuader is a risk-taking, socially poised and motivating team builder.

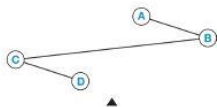
NEEDS:

- Independence
- Opportunities to interact with others
- Variety and change
- Freedom from rigid structure

BEHAVIORS:

- Self-confident
- Persuasive, stimulating
- Fast-paced
- Informal

Average Behavioral Pattern



Signature work styles:

- Communication
 - Empathetic, persuasive selling style
 - Gregarious and extraverted
- Delegation
 - Delegates authority and details
- Decision making
 - Confident decision-maker
 - Works through people to solve problems
- Action & risk
 - Venturesome risk-taker
 - Strong initiative

Strengths:

- Drives change and challenges status quo
- Motivating, stimulating communicator
- Proactive and results-oriented

Common traps:

- May appear talkative or superficial
- May provide limited follow up or attention to detail
- May appear too casual or uninhibited

How to work well with them:

- Interact with Persuaders; they like to work with and develop people.
- Give them variety; Persuaders want freedom from routine.
- Give them independence; they are ambitious and have strong initiative.



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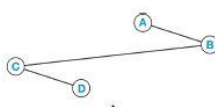
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Average Behavioral Pattern



Motivate and recognize

- Provide opportunities for advancement.
- Allow them to show their ability to lead and motivate.
- Provide social and status recognition for leadership, skills and results.

Provide direction and feedback

- Provide feedback in terms of how it could improve their leadership or career advancement.
- Give direction at a high level using an informal approach.
- Make feedback about performance on a work task rather than how others perceived it; they may be sensitive to things that hurt their reputation in others' eyes.

Delegate

- Don't delegate work that is detailed, repetitive or isolated in nature.
- Do delegate work that allows them to be a team leader.

Coach

Coaching is not the same as managing, but we know that managers often play a coaching role. Keep in mind that coaching conversations are about asking questions and letting the coachee come up with ideas, actions and next steps.

- Help them learn to use their interpersonal skills to build support and enthusiasm for ideas and initiatives.
- Help them learn when to stop talking and start listening during coaching and in other situations.
- Give them examples of situations where they may have come across as too informal or casual so they can be more self-aware.

Reference Profiles

Reference Profiles are like neighborhoods.



Behavioral Patterns are like specific addresses.

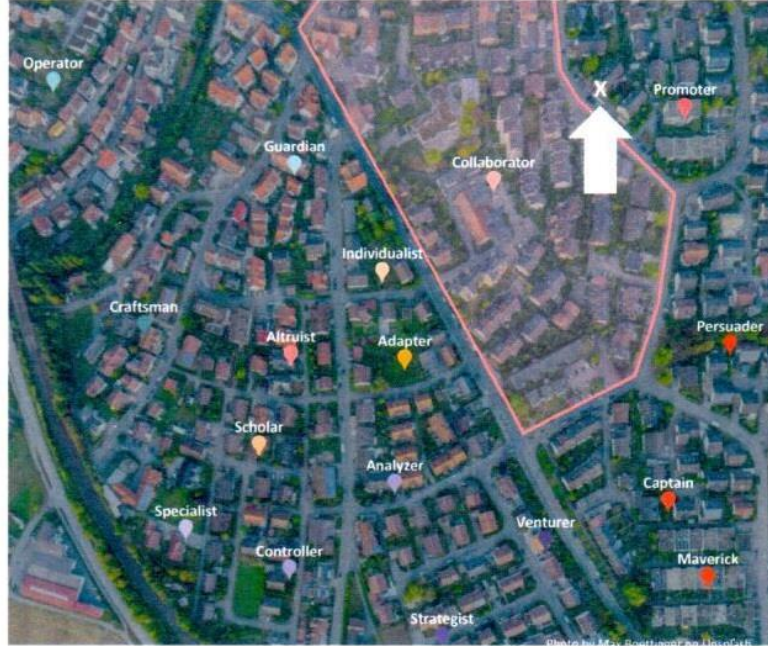
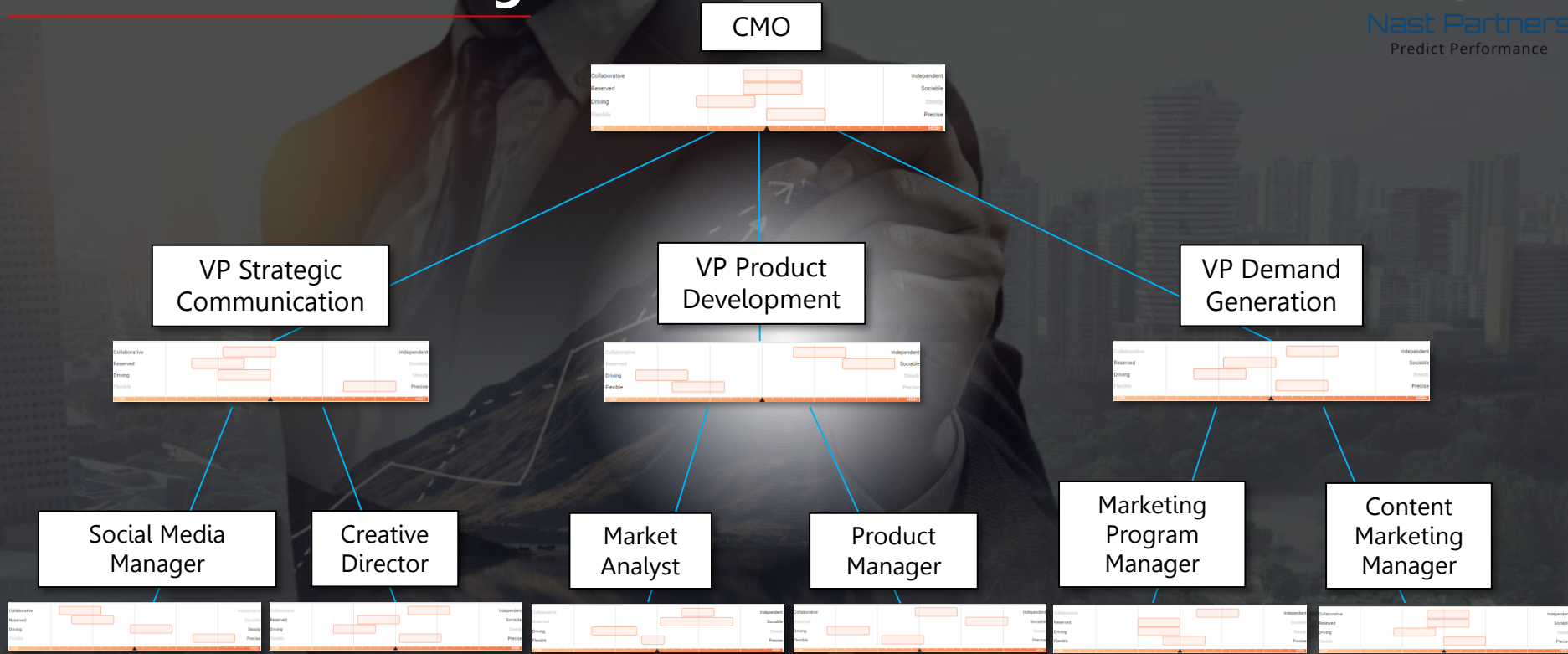


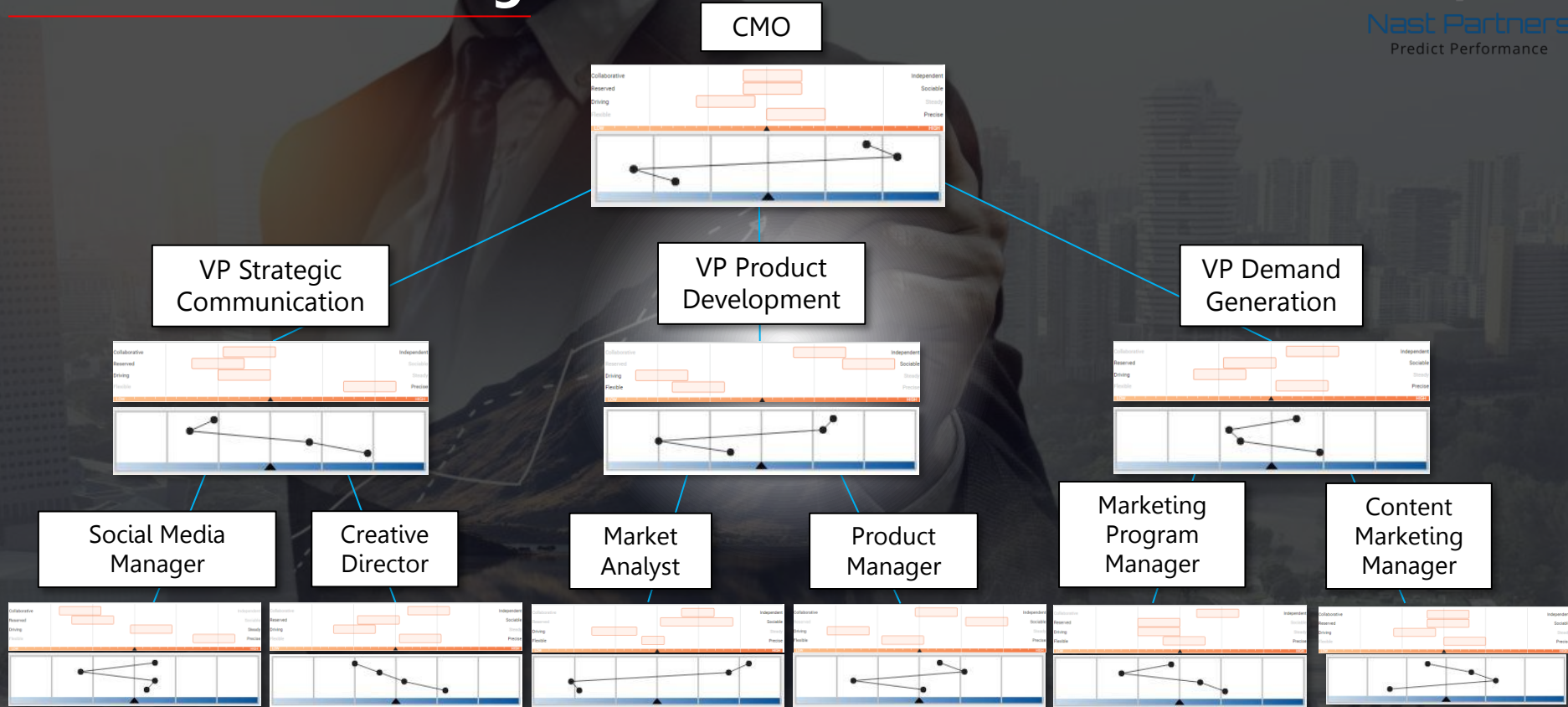
Photo by Alex Bonington for iStock

*Take the Guesswork out of
Succession Planning*

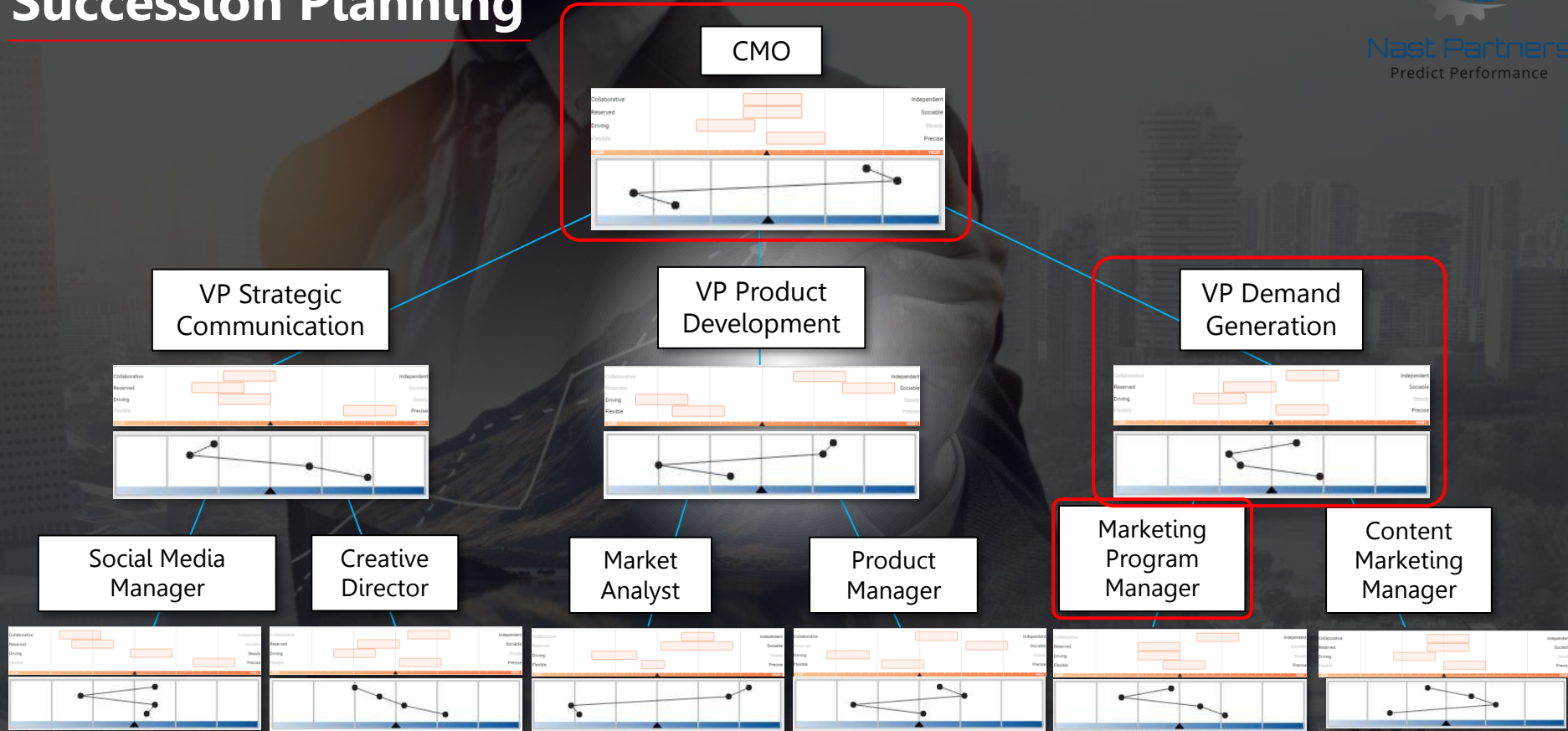
Succession Planning



Succession Planning



Succession Planning



Preparing for Sale



Nast Partners
Predict Performance

Compare

Save

Used **2006** Aston Martin Vanquish S

\$114,950

Arrange Financing

Calculate payment



All (93) Photos (93)

Page 1 of 14



View our Inventory

Visit Dealer Website



Get a free
Kelley Blue BookSM
Instant Cash Offer on your trade-in

Vehicle Overview

About This Model

Exterior:
Gray

Interior:
Black



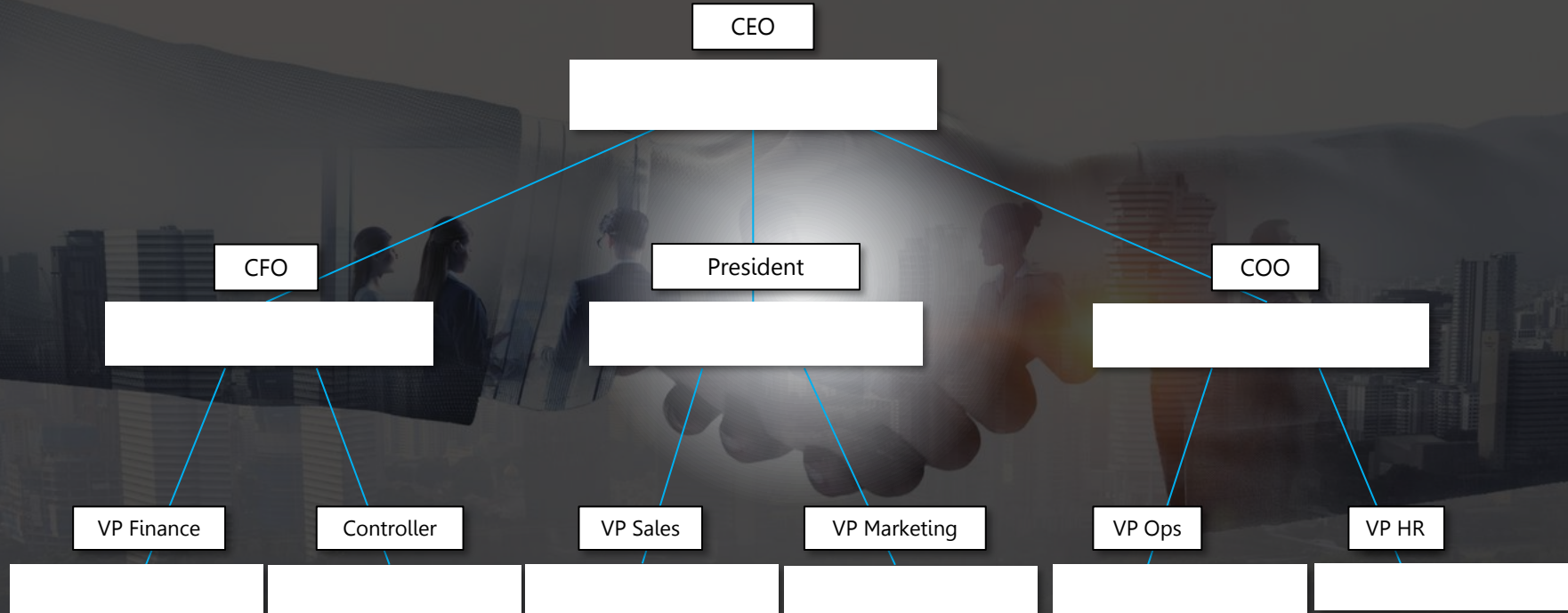
View the Free CARFAX Report
for this Aston Martin

The Sell Side...



Mergers, Acquisitions, and Integrations

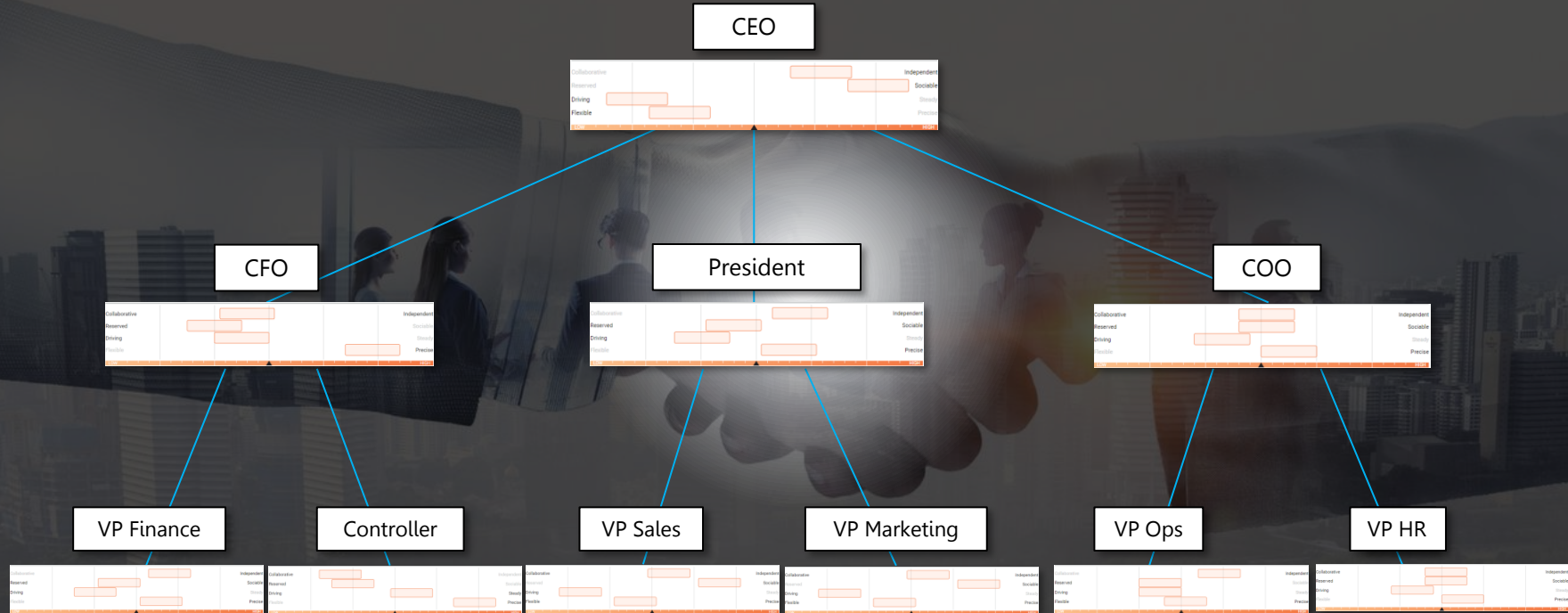
Envision the leadership team you want to acquire and integrate with...



The Buy Side...

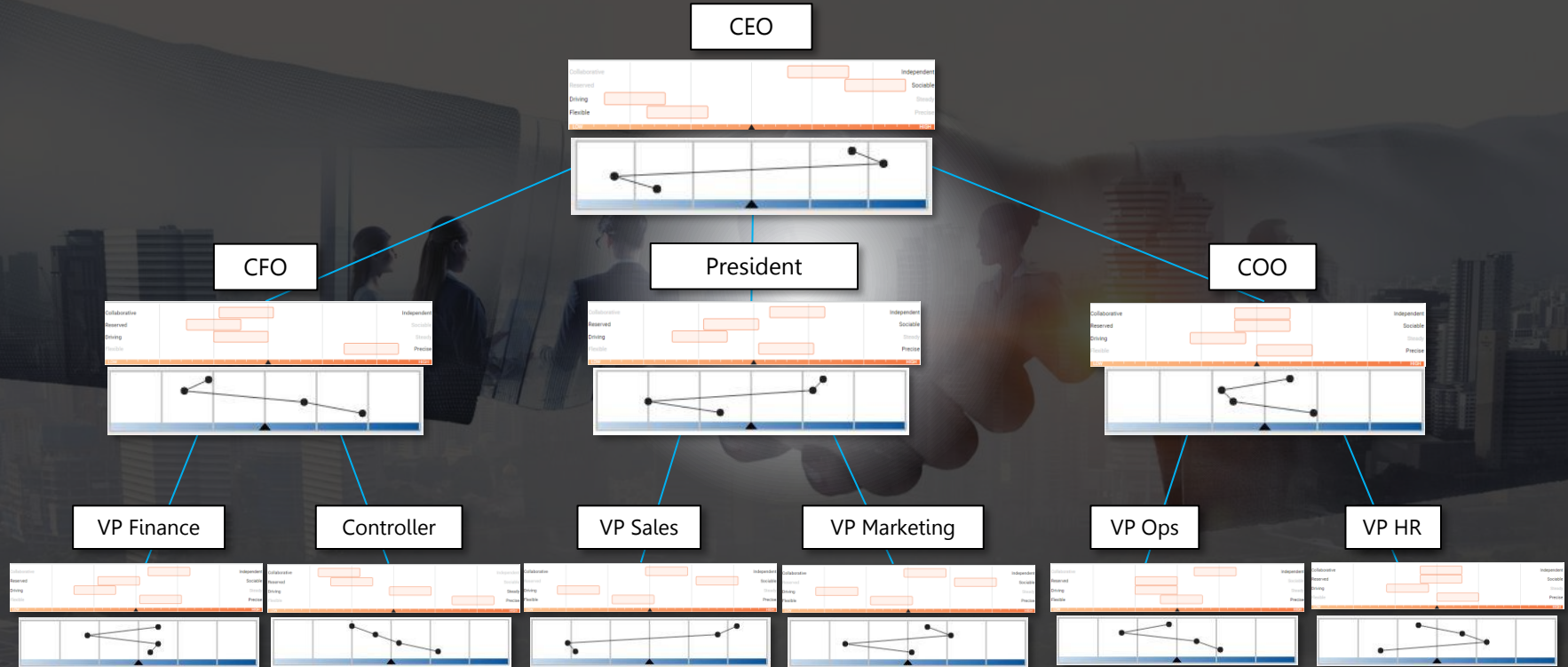
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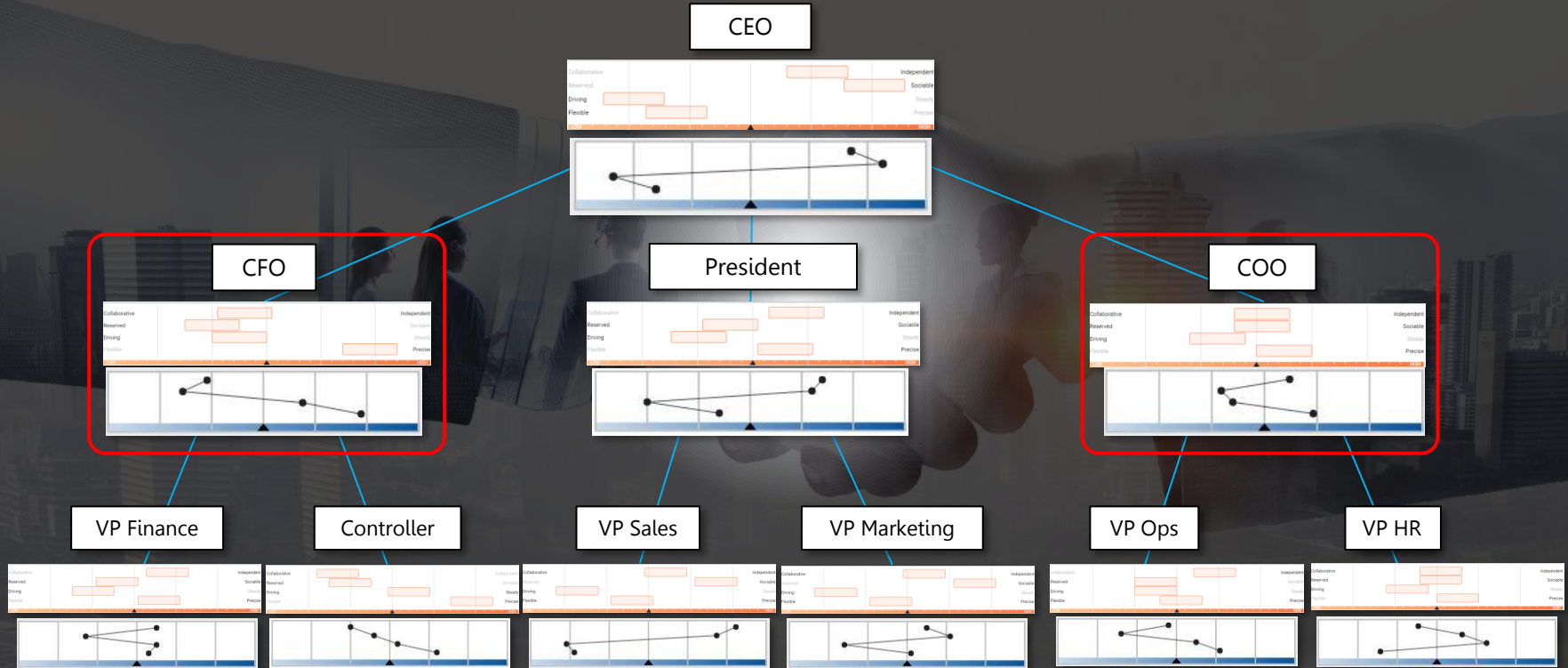
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Mergers, Acquisitions, and Integrations

Envision the leadership team you want to acquire and integrate with...



Things to consider... what's to come...



"The value of a business is a function of how well the **financial capital** and **intellectual capital** are managed by the **human capital** - so you'd better get the human capital part right."

– Dave Bookbinder, Valuation Expert & Best-Selling Author



Late last year, The Human Capital Management Coalition, a global group of 25 organizations representing \$3Trillion in assets, submitted a rulemaking petition to the SEC to adopt standards **requiring companies to disclose** information on **human capital management policies, practices, and performance**. They are looking at everything from workforce demographics, skills, stability, **retention/turnover, culture, productivity, engagement, compensation, incentives, and more.**

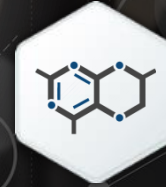
PI Cognitive Assessment™



12min timed
assessment



Measures learning speed
and the ability to manage
complexity



Scientifically Valid

The assessment measures 3 factors of cognition:



Numerical



Abstract



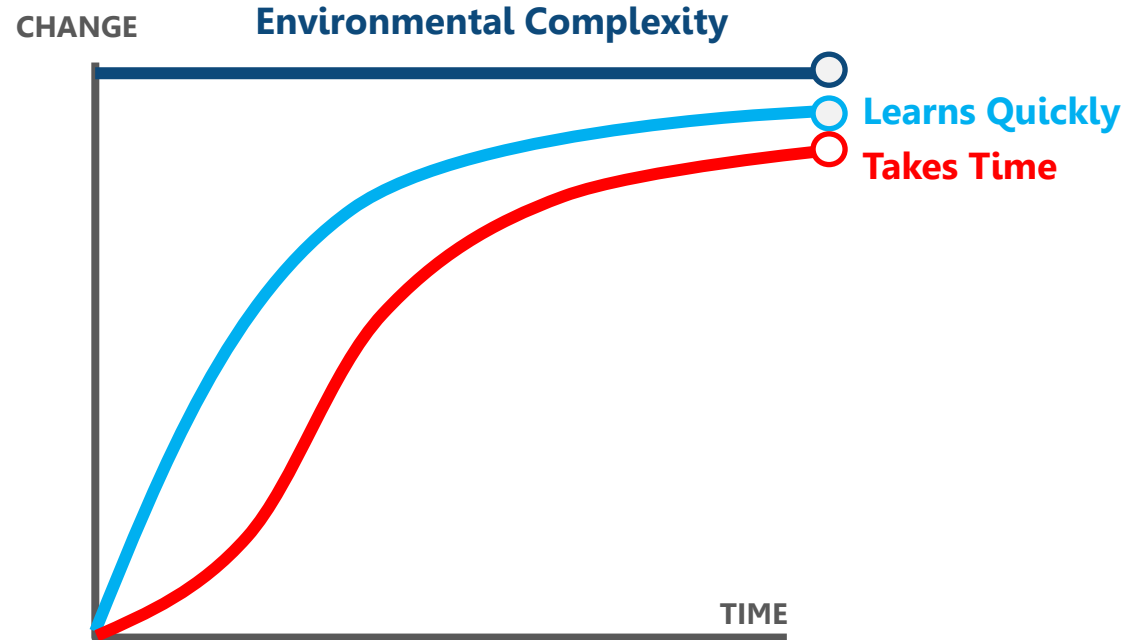
Verbal

Environmental Complexity

Due to Change in Business Environment



Nast Partners
Predict Performance

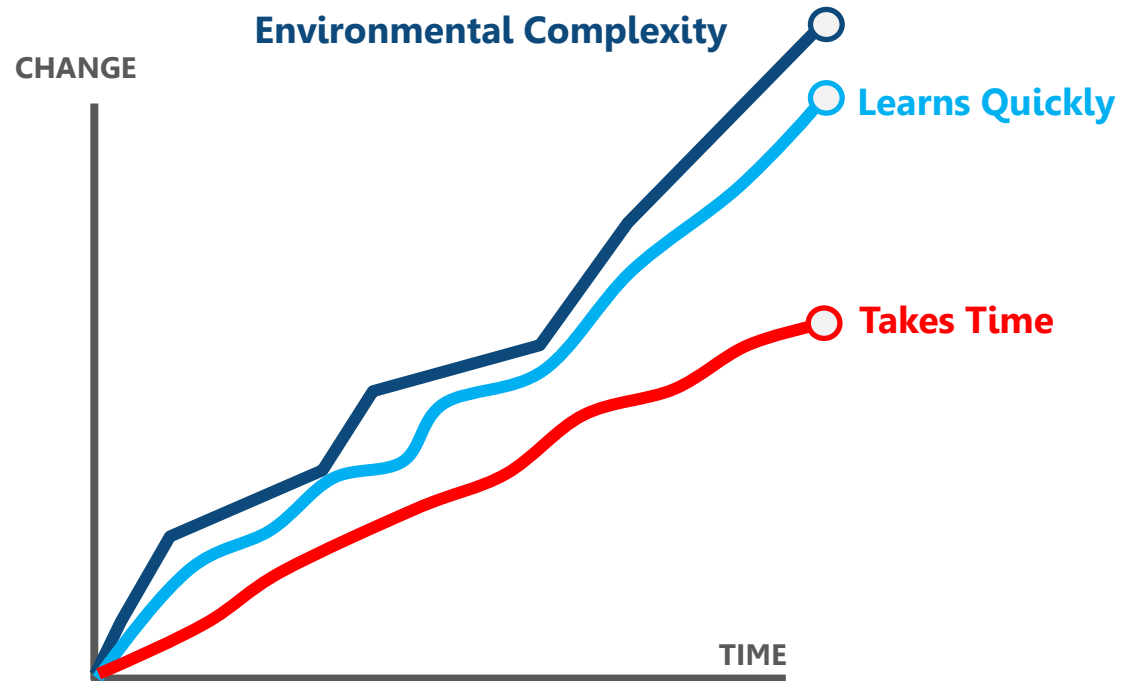


Environmental Complexity

Customers, Product, Industry, Process



Nast Partners
Predict Performance



Assessment suite



The PI Job
Assessment™

Measures the Job
“Benchmark”



The PI Behavioral
Assessment™

Measures the
Drives of a Person



The PI Cognitive
Assessment™

Measures the
Cognitive Ability of a
Person

Take-Aways



People = Investment



Analytics = Awareness



Predict Performance = Prevent Problems

Questions?



dave@nastpartners.com