### Level A – New to Position

* Requires “hand-holding”
* Requires extensive details
* Limited or no decision making capability
* “Learning mode”
* REQUIRES A DIRECTIVE LEADER

### Level B – Gaining Confidence

* Becoming Independent with assigned tasks
* Still room to extend capabilities
* Starting to ask “why” type questions (Why do we do this?)
* “Expanding mode”
* REQUIRES A DIRECTIVE AND RELATIONSHIP-MINDED LEADER

### Level C – The Solid Performer

* Highly independent
* Full grasp of job responsibilities
* Starting to challenge and expand team capabilities
* Takes leadership positions over others
* Critical retention time!
* “Confidence Mode”
* REQUIRES A RELATIONSHIP-MINDED LEADER

### Level D – “Succession”

* Completely independent
* Creates own style and processes
* Highly trusted by leadership
* Sought by peers for knowledge and support
* “Ownership mode”
* REQUIRES ONLY MONITORING AND “BASIC CARE AND FEEDING”!

### Type 1 – Action Minded Individuals

* Require activity to be satisfied
* Most likely to leap before looking
* Easily bored
* Finish one thing, moves to the next
* In extreme, can be “bossy”

### Type 2 – Social Minded Individuals

* Like to gather and organize people/work
* Enjoys the role of “communicator”
* Works toward, and best, in consensus roles
* Will often find process “tedious”
* Gains energy from being with others
* In extreme, can be “chatty” exchanging interaction for action

### Type 3 – The Planners

* Enjoys detail oriented work
* Seeks alternatives to attaining goals
* Thoughtful and reserved in approach to work
* Enjoys leeway in accomplishing tasks
* Needs to understand parameters/boundaries
* In extreme, will examine alternatives and not act (“analysis paralysis”)

### Type 4 – The Questioners

* Enjoys understanding rationale for decisions/actions
* Passionate for process and procedures
* Managers vs Leaders – they question change
* Formal and methodical
* In extreme, can be rigid and inflexible

**Confidence Level A – New to Position**

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| **Character Type** | **Effective Management Styles** |
| **Type 1**  **Action Minded** | * Needs to be “useful” quickly, start with small tasks * Provide detailed instructions – orally or written as long as they allow individual to work independently * Allow individual to work one thing at a time, but keep them coming! * Allow individual to “own” responsibility, however small |
| **Type 2**  **Social Minded** | * Inform these individuals about what is going on, allow them to “pass it on” * Give detailed instructions, but do it personally – sit by them on the computer and work through the task with him/her * These people are good organizers of others, allow them to track deliverables * Usually prefers “a vote” in matters * Do more “selling” and less “telling” to maximize success |
| **Type 3**  **Planner** | * Give instructions in form of objectives and “needs”, allow flexibility in “how” achieved where possible * Allow to work independently whenever possible * Encourage these individuals to ask questions about what and how they perform * Handle gently, direct criticism is often difficult for these individuals (Ask them questions for best results!) |
| **Type 4**  **Questioner** | * Needs detailed process, be as thorough as possible, explain both “what” and “how” * Be formal in communications with these individuals * Give priorities of tasks as well as discrete deadlines * Change is difficult for these individuals – provide details, and allow them to “process” * Check with them, allow for their “analysis/questioning” |

**Confidence Level B – Gaining Confidence**

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| **Character Type** | **Effective Management Styles** |
| **Type 1**  **Action Minded** | * Pile on the work! But allow for “one at a time” processing * Provide less detailed instructions - encourage individual to come up with own actions to take * Emphasis on task ownership critical to maintain confidence * Focus communications on the individual, as well as the tasks – but make action oriented…ie “What would you like to be doing?” |
| **Type 2**  **Social Minded** | * Whenever possible, place these individuals in the “center of the action” * Allow these individuals to work with as many different people as feasible Start process to make them “jack of all trades, master of none” types * Expand organization responsibilities * Shift direction with these people to a strong mix of “telling and selling” Both are required for success |
| **Type 3**  **Planner** | * Continue to give instructions in form of objectives and “needs” Expand their role to plan/ and determine the “how” Examine and discuss results * Independence in producing results increases in importance at this stage * Expect and set up specific time for entertaining questions, after you give individual time to digest/analyze assignments * Continue to ask them questions as a means of changing/adjusting their performance and/or working techniques |
| **Type 4**  **Questioner** | * Continue to provide detailed process, be as thorough as possible, and explain both “what” and “how” * Be formal but brief in communications allowing them to control conversations * Give priorities of tasks as well as discrete deadlines * Begin sharing change with them ahead of time as a means to allow them to question and process the change Announcing change as a surprise to them would be unlikely to succeed with these individuals |

**Confidence Level C – The Solid Performer**

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| **Character Type** | **Effective Management Styles** |
| **Type 1**  **Action Minded** | * Can handle large workload; however watch for “activity but inadequate results” Can try to do too much * Assign individual to come up with own actions to take * Allow complete ownership of tasks They must “rule their kingdom” * Focus communications on the individual and their activities Little or no task management |
| **Type 2**  **Social Minded** | * Strong need to understand “all that is going on” to feel needed and wanted Will “spread the word” effectively * Allow these individuals to work with as many different people as feasible Allow and expect “jack of all trades, master of none” to be their job description * Should be treated as the center of the group organization responsibilities whenever possible * Allow these people to participate in decision making whenever feasible Focus communications on the individual and his/her future desires |
| **Type 3**  **Planner** | * Satisfaction comes with the ability to “determine how the office/team works” * Should be allowed independence for satisfaction * Allow flexibility and creativity whenever possible * Focus on needs to “do different things” and discuss theoretical ideas to improve results |
| **Type 4**  **Questioner** | * Provide advocacy for detailed process, allowing them to derive them Appreciate their thoroughness * Ensure they know your rational for both the “what” and “how” * Be formal but brief in communications allowing them to control conversations * Support their priorities and deadlines Thoroughly explain if you must change them * Should share change with them ahead of time as a means to allow them to question and process the change |

**Confidence Level C – Succession**

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| **Character Type** | **Effective Management Styles** |
| **Type 1**  **Action Minded** | * Can expect too much from him/herself and others; ensure activities are balanced * Provide autonomy to take action whenever possible * Allow ownership and inclusion in team/organizational initiatives Allow them to “rule their kingdom” both today and tomorrow * Focus communications on the individual and their activities |
| **Type 2**  **Social Minded** | * Involve in organizational issues Have them derive and formulate team communication * Allow them to drive team synergy and change initiatives * Ensure their assignments are varied * Must feel they are respected via participation in decision-making |
| **Type 3**  **Planner** | * Provide opportunity to direct “how the office/team works” * Must be allowed independence for satisfaction * Allow flexibility and creativity required for satisfaction and desired results * Often must feel supervisors are receptive to change and alternatives to be satisfied |
| **Type 4**  **Questioner** | * Allow time for thoroughness, watch for tendency to micromanage * Be formal but brief in communications allowing them to control conversations * Support their priorities and deadlines Any changes to them must be self-directed If imposed upon them, they may resist * Allow for systematic approach to handling change |