

RETrosPECTively 2008

When immersed in tasks of the moment, it's easy to lose sight of the diversity inherent in the forest.

—Dr. Jonathan Dehlinger, VRH Business Psychologists, 2009

2008 was a/an _____ (fill in the blank) year! Whatever word, or words, you've chosen to insert in the blank, one thing is undeniable – it certainly has been a rollercoaster ride.

This was evident even for our organization. Since a portion of VRH's services relates to pre-employment evaluation of candidates, by default we represent a "leading indicator" of what is happening in the regional economy. The first half of 2008 was strong with most businesses continuing to operate in an optimistic growth mode, while the second half gave way to a slow decline in employee hiring as economic concerns influenced a conservative approach for management. By year end it was obvious that most organizations were holding firm on staffing levels and only addressing "key position" vacancies. For some, this sudden reversal created virtual whiplash!

No one, including the 'experts', knows how deep or far this cautiousness will extend into 2009. However, we expect that organizations like ours will be "leading indicators" on the back end as well; enabling us to get an early preview of our clients' returning confidence in the economy and their own business strategies.

From our experience over the years, validated again these past months, this slowdown in hiring typically has been accompanied by a renewed focus on developing internal talent within many of our clients' organizations. VRH has been engaged with numerous clients in executive coaching and career guidance initiatives, all aimed at keeping and growing talent. The accepted strategy being that these organizations will be well positioned with a strong "bench" to capitalize on the recovery once the economy rebounds. Proactive, insightful management understands the value implications of this strategy on long-term business success.

So as we looked back at 2008 to gain perspective of – and appreciation for – the year's accomplishments (as part of our year-end review and planning process), we thought you might be interested as well in this retrospective. Accomplishments with some of our business partners, and a few personal milestones, are encapsulated in this review.

Career Guidance

- A 20-year old Princeton University student was looking for guidance on academic majors and, ultimately, career options that align with her interests and capabilities. A comprehensive individual assessment along with in-depth exploration of ideas and passions enabled VRH to bring focus to her options. We were also successful in connecting her with experienced professionals for informational interviews in her primary interest area. She is now on track toward graduation with greater confidence in the academic and near-term career decisions she has made.

- Forty-three year-old Bill spent much of his career employed by others in a niche business with global reach, successfully building his reputation and subsequent network. Feeling the entrepreneurial itch, he established his own company four years ago in this niche industry only to be confronted by the gloomy economic recession. His objective for seeking career guidance was not to identify career alternatives as much

as to affirm individual strengths and capabilities. Armed with this knowledge, he has a new appreciation for how his entrepreneurial, sales/marketing, and business management skills can be applied to opportunities outside his unique niche. He is now able to explore options and direct his professional talents to a broader stage.

- Although Tom made sure a healthy dose of partying accompanied his early academic experiences, he eventually "settled down" to earning a finance degree and a CPA by age 28. What followed was a series of traditional accounting roles with varying employers, all of which served to impress upon him how much he "hated numbers." Tom's career guidance objective was to gain clarity about personal talents and to identify the environment - that is, career possibilities – where these talents might be better utilized. Today, Tom understands how and where his unique capabilities and characteristics fit best within the world of work and is using these fresh insights to grow in his chosen career.



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Executive Coaching

- A senior manager in a global technology company was encouraged by his employer to participate in a 360-degree feedback experience as part of the organization's internal professional development initiative. This well educated, technically competent division leader under-appreciated the value of "people skills" in his management role. The 360-degree feedback process facilitated by VRH brought this to light in clear, objective terms, laying the groundwork for developmental planning and behavior change. Curiously, neither identified strengths nor weaknesses offered much surprise to this manager; apparently self-insight exceeded past motivation to change behavior. Manageable goals have been set and embarked upon with renewed effort, and ongoing coaching will extend over the next several months with ultimate success yet to be determined.
- The executive director of a state trade association voluntarily sought coaching support to strengthen leadership skills and enhance performance in his newly assumed duties. Having been promoted into this role, he is now looking to build a repertoire of skills that can help him succeed. His coaching experience will be a "learn while doing" process. Although it is too early in this relationship to predict outcomes, it is encouraging that this young leader is motivated and sincere in strengthening professional skills as he grows in his career.

Selection

- This domestic manufacturer of technically complex equipment relies heavily upon IT professionals for design and development success. VRH's QuickV® on-line personality assessment (see VRH Newsline, winter 2007) is integrated into their screening process along with an intellectual measure to help determine whether the candidate will proceed to the next level of consideration. This represents for them a quick, convenient, and cost-effective means of candidate screening.



- Internal screening had reduced the number of candidates to a manageable three for the Director of Operations position in this heavy metal manufacturer. VRH was asked to conduct a comprehensive assessment of each, customized to affirm technical competence, but perhaps more importantly, to determine non-technical "fit" with organizational culture, values and leadership peers. The results provided additional perspective on performance talents and shortcomings of

each candidate as well as a ranked order based on assessment findings. This information was then integrated with other organizational data, interviews, and reference checking before an offer was extended to the top candidate.

- Besides a business in the healthcare industry, Mark and his wife own and manage several fast-food outlets in a neighboring state. The good news was both business ventures were experiencing steady growth; the bad news was that the demands of splitting time in management and service delivery had become impractical. The couple decided that they needed an operations manager for day-to-day management of the out-of-state fast-food outlets. Candidates possessing industry experience with global fast-food leaders were quickly identified. However, Mark and his wife were concerned about the intangibles such as management style, loyalty, and motivation to be a leader in a smaller business setting. VRH was contacted to do personal interviews and customized assessments, which increased the overall understanding of the candidates' capabilities enabling Mark and his wife to make a confident hiring decision. One year later, all parties are pleased with the working relationship and productive nature of the results.
- A Midwestern school district sought assistance in the selection of their curriculum development leader. As is typical in the education field, identifying qualified candidates went quickly. However, identifying candidates capable of effectively meshing with the District's staff and School Board, and communicating effectively with the District's parent population was a larger challenge. VRH was invited to offer assistance. A customized evaluation and subsequent discussion with the School Board led to a confident ranking of candidates, and ultimately, to satisfaction with the educator chosen to fill this void.
- A national philanthropic organization sought assistance with identifying "best fit" candidates for their COO position. Job duties, expectations and organizational culture were studied prior to VRH meeting with multiple candidates. Thorough assessments were conducted and discussions with organizational leadership about the findings were complimented with formal written reports. Nevertheless, the entire process was plagued by minor obstacles including multiple rescheduling and frustrating misunderstandings around execution of the assessment process. Lesson learned – managing expectations is as important as delivering service.
- A global manufacturer was interested in three, well-qualified, external candidates to fill the position of general manager for international business operations. Armed with position information, desired experience, and competency expectations, VRH conducted a comprehensive executive evaluation of each candidate. The company gained additional understanding of performance talents and future development potential for the candidates from VRH's contribution to this selection process. One of the candidates opted out as the decision process stretched on. Ultimately, this manufacturer embarked on restructuring rather than hiring anew. Sometimes that's the way it goes.

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- A respected Midwestern university received Board of Regent approval to seek a dean to lead the founding of a new academic program. The incumbent would require both academic credentials and business acumen sufficient to support anticipated fund-raising needs. From among the applicants VRH was asked to evaluate, one rose to the top as best all-around choice for this assignment. VRH's formal written assessment report included coaching and development strategies to facilitate assimilation and maximize probability of early success. The institution decided to divide the challenges of this role into two components, engaging their selected choice as academic dean, while assigning fund-raising responsibility to another well-qualified professional. Progress on both fronts is well under way.



- This Canadian technology company makes use of VRH's QuickPIC® paper/pencil screening of social behavior and personality as one component in the evaluation of potential field service technicians. Being responsive to customers' needs and sufficiently autonomous performance (without close supervision) are among key indicators for determining those selected. Lesson learned: 'Ruling out' is as important as 'ruling in'.

- An Illinois-based food processor was on the verge of filling a regional sales manager position but before a final decision was made, VRH was asked to conduct a comprehensive evaluation focusing specifically on entrepreneurial or sales instincts and work ethic. Due to geographic location and time constraints, a VRH field administrator proctored the testing and provided casual observation of the candidate's behavior and test-taking attitude. Since a personal interview was not feasible, the assessment was based on VRH's interpretation of the test results, written personal history submitted by the candidate, and feedback offered by the field administrator. Although face-to-face contact is ideal and preferred, sometimes practicality prevails.

Family Business

In partnership with a mergers and acquisition (M&A) specialist, VRH is often asked to counsel small business owners on planning for life change following the sale of their business.

- Bill and Mary bought a small metal fabrication company and grew it into a very successful business over two decades. Because he was a few years older, Bill arrived at "retirement readiness" before his wife. Coaching and guidance with this couple followed two paths, one relating to planning for life after business ownership, and the other coming to resolution/compromise given differing needs and expectations at this stage in their lives. At the last visit, the transition of the business to new owners has been successfully accomplished. Bill and Mary have entered this next phase of life together with some trepidation but mostly in anticipation of opportunities they will be free to explore.

- Two brothers and a non-relative principal co-own and run a growing engineering design/manufacturing company serving primarily the beverage industry. Ostensibly their need was in defining and in filling an operations manager position to handle day-to-day responsibilities. An initial candidate, identified more through coincidence than concerted search, was evaluated by VRH. It became apparent when discussing the evaluation results that additional "homework" by the three co-owners was required before the position could reasonably be expected to be filled. VRH

took the lead in researching information on typical operations manager job duties and salary range in medium-sized Midwestern manufacturing companies. An engineering resource was also identified who could conduct an operations audit, providing the owners with baseline understanding of where needs exist, facilitating near-term strategies for lean manufacturing improvement. The seeming enormity of such efforts has slowed decision-making and subsequent action by this ownership triumvirate. Lesson learned: Advice given does not mean advice taken ...but stay tuned.

Succession Planning

- This specialty electronics manufacturer has long been run – but not owned – by a president who was increasingly looking to spend time engaged in varied interests outside of the business. Little priority was given to succession strategies because the family owners and sitting Board were sufficiently content with the president's performance. Regardless, the president recognized the inherent dangers to the business and he engaged VRH to assess all senior staff in hopes of identifying potential successors who could be systematically developed. The results of the assessments were clear but disappointing – no obvious successor was evident in these ranks. Development plans were instituted nonetheless to enhance individual capabilities in current assignments. Succession strategies evolved to "Plan B" – an external search for a potential president. Succession planning efforts remain active. Lesson learned: It's never too early to think long term.



2008 Personal Milestones



- Dr. Jon's daughter, Erin, became Mrs. Edwards on July 5th at a wedding ceremony held in Milwaukee, WI. Erin works at Fiserv, a technology service provider to the financial industry; Tim works at Pieper Electric, an electrical construction company with headquarters in Milwaukee, WI.

- Deborah Schmerda, VRH's client services manager, celebrated her 10th anniversary with VRH in 2008. While proctoring tests for our clients, Deborah often shares with candidates how VRH utilized their own testing service in her selection process. "I used to change jobs every three years or so, but going through the testing process with



VRH assured them, and me, that I was a good fit for the position. The proof is in the pudding. I enjoy both the technical challenge and the camaraderie I have with our clients. I have a sign on my desk that says 'Make every client very

happy every day,' and I am always on the alert as to how to make that happen. I am thrilled to be here ten years and look forward to future challenges."

- VRH participated once again in the 5-K Run for Arthritis during Milwaukee's Irish Fest on August 16 raising a modest amount for a good cause. Anyone wishing to run with the team in 2009 is encouraged to give Dr. Jon a call...Irish or not, you'll be welcome!



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