



CFA Society Austin – Talent at the Table

February 21, 2019



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PERFORMANCE

Three key ingredients



INDIVIDUAL

Who is at the table?



TEAM

How well do they play together?



CULTURE

How is it created?



INDIVIDUAL
Who is at the Table?

Who is at the Table?

Stand up if you...



Have an organized closet

By color and style!

Operate from a to-do list

Even on the weekend!

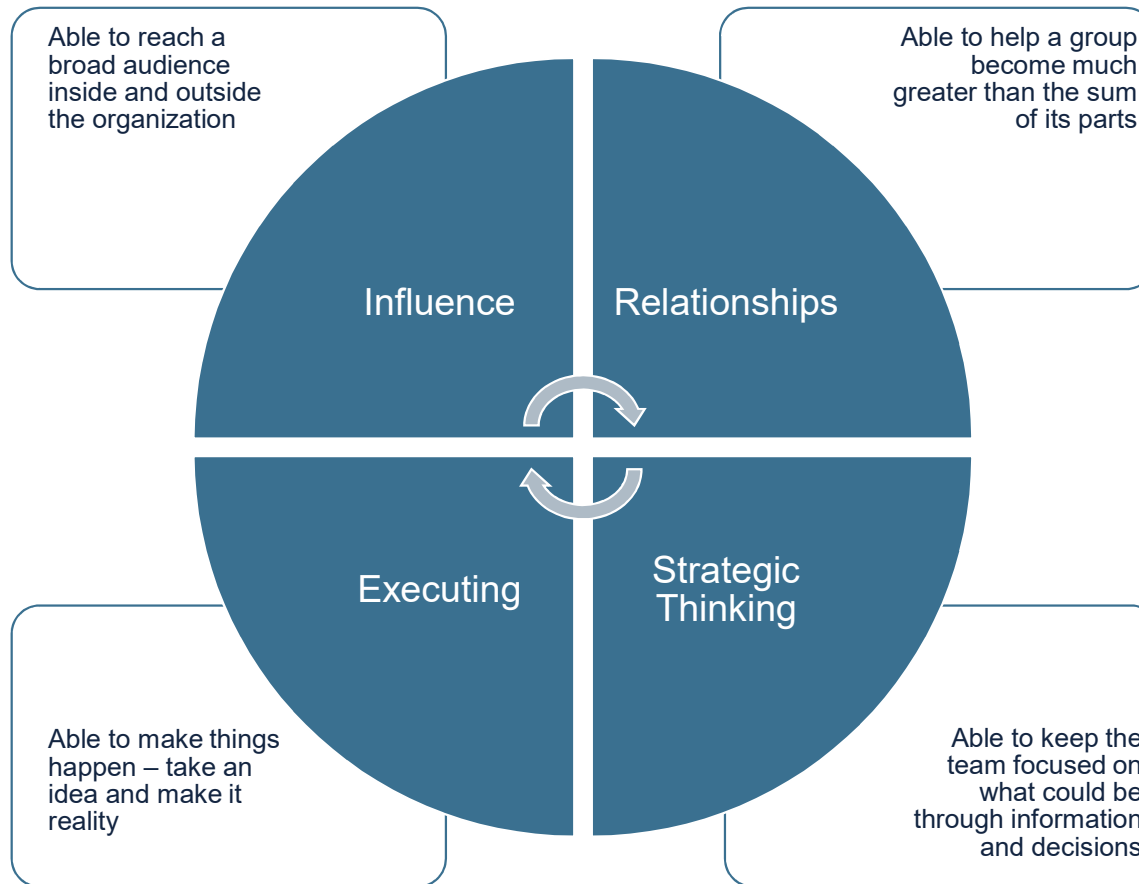
Figure out the ending of the movie half-way through

Talk to complete strangers at the grocery store, on the plane, in the elevator

Repeatedly push the elevator button to remind it you are there

YOUR STYLE

Leverage Your Leadership Success Model



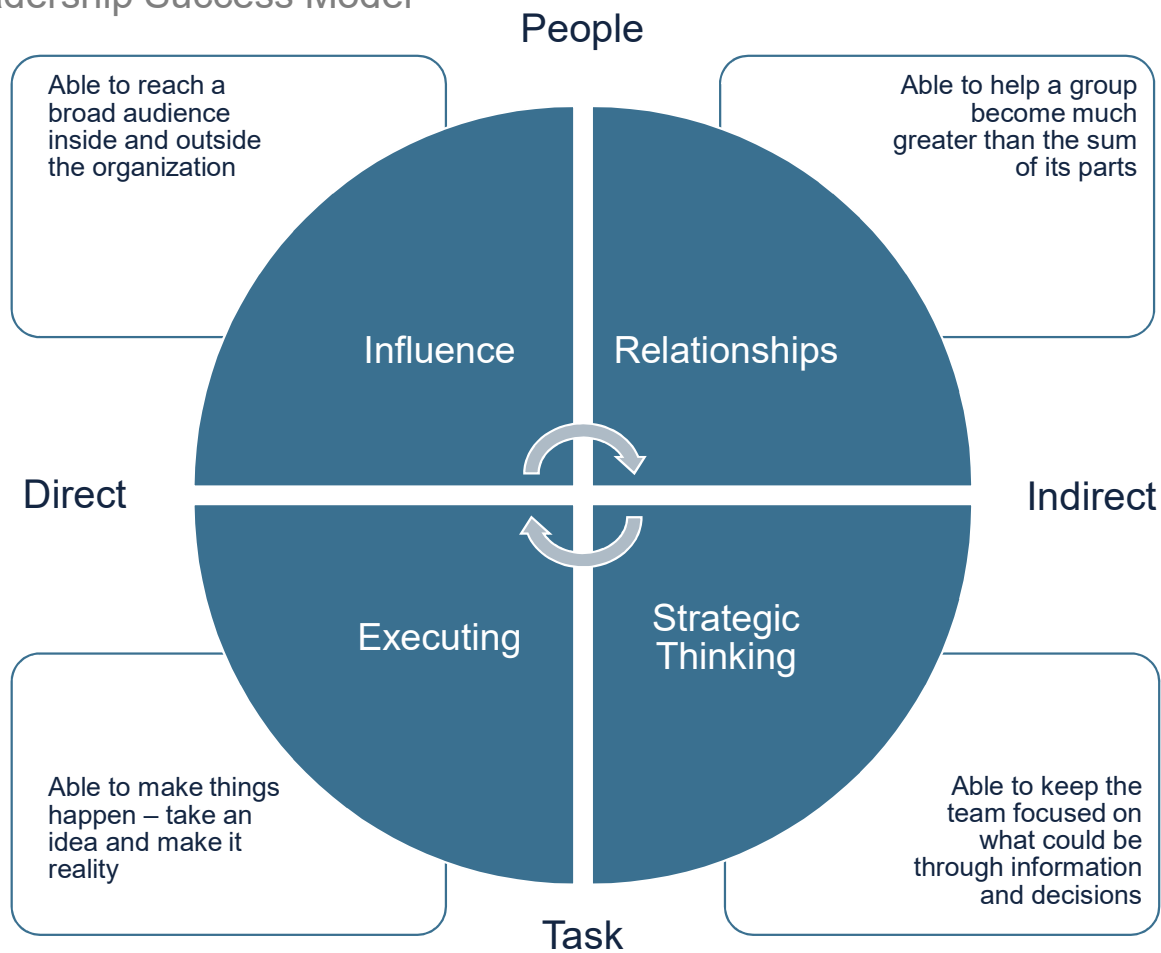


TEAM

How well do they play together?

YOUR STYLE

Leverage Your Leadership Success Model



HIGH PERFORMANCE TEAMS

SHARE THESE 5 CHARACTERISTICS*

Accountability allows team members to hold themselves and each other responsible and to live up to expectations

Commitment is clarity around decisions and complete buy-in from team members

Healthy Conflict means that a team is willing and able to engage in unfiltered passionate debate of ideas

Trust is a willingness to be vulnerable within the group and open with each other about strengths and weaknesses



Results come from a focus on collective goals of the team

Based on Lencioni's Five Dysfunctions of a Team



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PROCESS FOR HIGH PERFORMING TEAMS

Four step process



Develop emotional intelligence (EQ) in each team member by utilizing an assessment and team exercises. The key area of focus is to build trust with others and influence others appropriately.

Administer and interpret a baseline survey of how the team views their current state in terms of high performance.

Create a charter and statement of purpose for their team. Includes the definition of roles and responsibilities as well as the structure of the team.

Develop a scorecard and team management system to track the progress of team initiatives and activities.





CULTURE

How is it created?

WHAT IS CULTURE?

A set of shared attitudes, values, goals, and practices that characterizes an institution or organization



BUSINESS CASE FOR CULTURAL CHANGE

Critical challenges that require cultural transformation

1

Strategic Change

To respond to:

- Changing economic environment
- Threat of new competition
- Emergence of disruptive technologies

2

Mergers & Acquisitions

Assess cultural compatibility for:

- Financial integration
- Structural integration
- People integration

3

Poor Performance

Result of:

- Gaps
- Misalignment

4

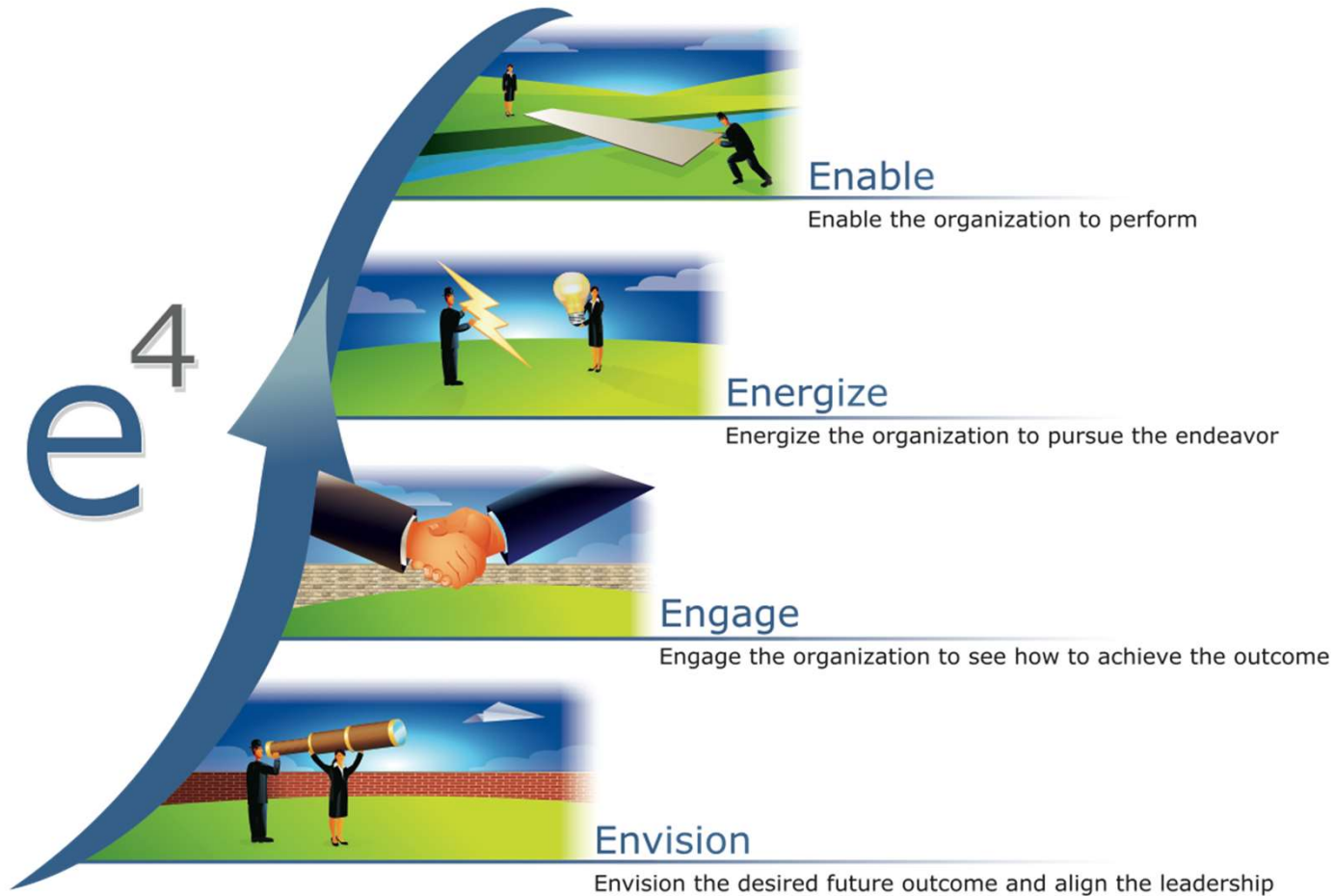
Globalization

Cross-cultural knowledge to:

- Mitigate organizational and operational risks
- Enable business development
- Negotiate
- Communicate



Leading an Enterprise Level Change Initiative





More at the Table than meets the eye!
Individual
Team
Culture



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ABOUT ENDEAVOR MANAGEMENT

Endeavor

Endeavor Management is a management consulting firm that leads clients to achieve real value from their strategic transformational initiatives. We serve as a catalyst by providing the energy to maintain the dual perspective of running the business while changing the business through the application of key leadership principles and business strategy.

The firm's 40 year heritage has produced a substantial portfolio of proven methodologies, enabling Endeavor consultants to deliver top-tier transformational strategies, operational excellence, organizational change management, leadership development and decision support. Endeavor's deep operational insight and broad industry experience enables our team to quickly understand the dynamics of client companies and markets.

Endeavor strives to collaborate effectively at all levels of the client organization to deliver targeted outcomes and achieve real results. Our collaborative approach also enables clients to build capabilities within their own organizations to sustain enduring relationships.



Endeavor THANK YOU

We look forward to working with you

Contact



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