



# City of Helena

CITY OF HELENA

City Commission Meeting

November 10, 2025 - 4:00 PM

City - County Building Room 326 / Zoom Online Meeting; <https://zoom.helenamt.gov/j/36053471/publicmeetings>

Special Meeting: City Manager Selection Process Discussion / Application Deliberation

1. **Call to Order and Roll Call**
2. **Pledge of Allegiance**
3. **Litigation Strategy**
  - A. Litigation Strategy (closed session per 2-3-203(4), MCA ) Discussion with City defense counsel Jordan Y. Crosby with Ugrin Alexander Zadick, P.C. re Brothers Maintenance Corp v City of Helena, DV-25-2025-0000654-IJ
4. **Open Session**
  - A. Screening Criteria Review
  - B. Finalist Interview Process Discussion
  - C. Town Hall / Public Forum and Feedback Discussion
  - D. Directors Engagement Discussion / City Tour
  - E. Leadership Assessment: Soundmind Leadership Discussion
5. **Closed Session**
  - A. The City Commission may close all or portions of agenda item #6 to the public pursuant to Sect. 2-3-203(3), MCA, if the Mayor determines the discussion relates to a matter of individual privacy and the Mayor determines that the demands of individual privacy clearly exceed the merits of public disclosure.
6. **Commission Applicant Review**
7. **Open Session - Discussion Overview**
8. **Public Communications**
9. **Adjournment**

It is the policy of the City Commission to take public comment on any action item. For further information on any of the items mentioned above, please contact the City Clerk's Office at 447-8410 or [dmclayborn@helenamt.gov](mailto:dmclayborn@helenamt.gov).

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**Phone: (406) 447- 8490**

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**Email: [citycommunitydevelopment@helenamt.gov](mailto:citycommunitydevelopment@helenamt.gov)**

**Mailing Address & Physical Location: 316 North Park Avenue, Room 445, Helena, MT 59623.**

***City of Helena, Montana***

**November 6, 2025**

**To:** The Helena City Commission

**From:** Dannai Clayborn, Clerk of the Commission

**Subject:** *City Manager Recruitment Process: Next Steps and Applicant Review/Deliberation*

**Present Situation:** City Staff and CMS present an update on the first round of community feedback on the City Manager position. Further direction is needed for the next phase of the process which will include the Finalist in person interviews and engagements. Commission members will need to discuss and deliberate on the current applicants and determine if the body would like to proceed with Semi-Finalist interviews with the current applicant pool.

**Background Information:** The City Commission has held discussions at the following public meetings regarding the City Manager Selection Process:

- Special Commission meeting on October 6, 2025
- Special Commission meeting on October 14, 2025
- Regular Meeting on October 20, 2025
- Administrative meeting on October 29, 2025
- Regular Meeting on November 3, 2025.

The Commission has given feedback and direction to inform Staff and CMS as to the preferred next steps in the process. This direction included additional opportunities for public outreach prior to the initial applicant review, and the inclusion of the entire Commission within all interviews for the candidates. The initial round of acceptance of applications was closed on November 5<sup>th</sup>, and the Commission is expected to deliberate on the current pool of candidates and determine if the Commission would like to proceed with Semi-Finalist interviews or resume acceptance of applicants.

Additionally, the Commission will need to discuss and provide direction regarding the Finalist Interview process to Staff and CMS. Proposals from Commissioners and CMS should be discussed and consensus should be provided to Staff to continue logistical and process planning.

**Proposal/Objective:** City Staff and CMS request the Commission review and discuss the provided materials and consideration of the updated work product to provide clarity to the consultant, Staff and the public.

The Commission will need to deliberate on the current applicant pool and give direction to CMS and Staff regarding the preferred next steps.

The City Commission may close all or portions of agenda item #6 to the public pursuant to Sect. 2-3-203(3), MCA, if the Mayor determines the discussion relates to a matter of individual privacy and the Mayor determines that the demands of individual privacy clearly exceed the merits of public disclosure.

**Notice of Public Hearing:**

*N/A*

**Staff Recommendation/  
Recommended Motion:**

Discuss and provide direction on the Finalist Interview process and deliberate on the current candidate pool and determine if the Commission will proceed with Semi-Finalist interviews.

# Helena City Manager Recruitment Community Input Analysis

**Prepared by:** Communication & Management Services, LLC (CMS)

**Date:** November 2025

**Audience:** City of Helena Commission and Community Stakeholders

## Overview

Between **October 23 and November 4, 2025**, CMS facilitated a public engagement process to inform the recruitment of Helena’s next City Manager.

This effort included an **online community survey** and an **in-person Listening Session** held October 30 at the City Hall. Together, these platforms captured the community’s values, priorities, and expectations for the city’s next administrative leader.

More than **180 residents participated** across both engagement tools. While the input reflected a range of perspectives, key patterns emerged with remarkable consistency—demonstrating broad community consensus around ethical leadership, transparency, fiscal prudence, and long-term stability.

## 1. Participation & Public Engagement Performance

Public engagement increased sharply after the survey’s release on **October 23**, with two distinct spikes:

- **October 24–25:** Driven by the City’s Facebook announcement and shared posts through community networks.
- **October 29–30:** Triggered by reminders about the **Listening Session** and the release of informational materials.

In total, **136 complete survey responses** were submitted. The participation rate represented a diverse cross-section of Helena’s population, including long-term residents, civic leaders, and local business owners.

### Interpretation:

The level and consistency of engagement reflect a community that is not disengaged, but rather *highly invested* in shaping the direction of Helena’s future governance.

## 2. Key Findings: Leadership Qualities

Respondents ranked the following as the most critical traits for the next City Manager:

1. **Integrity and Accountability** – openness, responsibility, and public trust (36.8%)
2. **Transparent Communication** – timely, open sharing of information (20.6%)
3. **Collaborative and Inclusive Leadership** – building partnerships and valuing diversity (16.2%)
4. **Strategic Vision** – long-term, proactive planning for Helena’s growth (13.9%)

Open-ended feedback reinforced these values, emphasizing the need for a **leader who listens, follows commission direction**, and remains visible and accessible to residents.

Participants also stressed that the City Manager’s role should not be “a training position” but one for an **experienced, decisive professional** capable of fostering trust internally and externally.

### 3. Community Priorities

The survey identified Helena’s **top policy and operational priorities** as:

Priority Area	% of Respondents	Implication
Infrastructure improvements (roads, water, utilities)	58.8%	Foundational concern and ongoing visibility issue for residents.
Affordable housing & homelessness	55.1%	Deep concern about affordability and livability.
Transparent, responsive government	39.0%	Ongoing trust-building opportunity.
Fiscal responsibility	35.3%	Confidence in management tied directly to accountability.

These findings parallel themes from the listening session, where participants called for *steady, financially competent leadership* that can balance Helena’s growth with fiscal discipline and environmental awareness.

### 4. Professional Experience & Expectations

When asked what professional experience should define the next City Manager, residents overwhelmingly selected:

- **Budgeting and Financial Management (51%)**
- **Infrastructure and Capital Project Oversight (49%)**
- **Partnership Building with Agencies and Nonprofits (55%)**

Participants frequently mentioned the need for **Montana familiarity**, emphasizing both local understanding and openness to new perspectives.

A recurring phrase—*“someone who knows Helena but can bring fresh ideas”*—underscored the city’s desire for balanced, forward-thinking leadership.

## 5. Notable Trends in Qualitative Data

- **Process Pace Concerns:**  
Comments urging “not to rush the process” increased during commissioner-led outreach, suggesting these views were influenced by external talking points rather than originating from survey prompts.  
\*\*CMS clarifies that while candidate screening will begin in November, the current schedule ensures preparedness—not premature action.
- **Desire for Stability:**  
Many respondents referenced the short tenure of recent City Managers, framing longevity as essential to restoring staff morale and public confidence.
- **Call for Cultural Shift:**  
Both survey and session comments described City Hall’s internal culture as “overly procedural.” Residents want a manager who can simplify processes, modernize services, and strengthen citizen access to information.

## 6. Synthesis: Story of the Data

The data tells a cohesive story of **re-engagement and cautious optimism**.

Helena residents are not resistant to change—they are wary of instability. They want a City Manager who reflects their community’s small-city values while steering Helena through sustainable growth.

Rather than demanding perfection, citizens asked for *competence, communication, and consistency*.

The engagement metrics show that when the City communicates transparently, the public responds robustly. Organic participation increased after each City-led update, validating that trust and visibility are strong predictors of civic involvement.

## 7. Recommendations (Objective and Solution-Oriented)

### 1. Maintain Public Communication:

- Continue transparent updates as recruitment enters the screening and interview phase.
- Publish a “You Said, We Did” follow-up summarizing how public input informed candidate criteria.

### 2. Integrate Feedback into Candidate Evaluation:

- Include *Integrity, Transparency, Fiscal Management, and Community Accessibility* as core behavioral competencies in interview scoring rubrics.

### 3. Sustain Engagement Momentum:

- Offer public Q&A forums for finalists and ensure hybrid access (in-person and virtual).
- Extend post-hire communication strategies to reinforce continuity and transparency.

### 4. Institutionalize Feedback Loops:

- Use survey engagement analytics (spikes, comments, participation timing) to guide future outreach for citywide initiatives beyond this recruitment.

## Conclusion

This engagement process demonstrates a clear throughline: Helena residents want **ethical leadership grounded in accountability, transparency, and local understanding**.

The City’s investment in inclusive recruitment has already strengthened community dialogue. Continuing to build on this trust—through consistent communication, visible responsiveness, and stable leadership—will set the stage for a successful transition in early 2026.



## **General Summary: City of Helena City Manager Listening Session**

**Date:** October 30, 2025

**Duration:** 1 hour 11 minutes

**Facilitators:** CMS (Communication and Management Services), City of Helena Staff

**Location:** In-person meeting, Helena, MT

**HELENA, MT** — The City of Helena held a community listening session on October 30th as part of its ongoing effort to recruit and hire a new City Manager. Facilitated by recruitment consultants from CMS (Communication and Management Services), the session provided residents with an opportunity to ask questions, share concerns, and offer feedback directly into the hiring process.

The feedback from the listening session for public input regarding the City of Helena city manager recruitment process closely aligned with results from the public survey, albeit with value added information from the in-person session. It should be generally noted community sentiment is framed by disappointment on the short tenure of previous city manager incumbents, with recognition the City has achieved stabilizing trends in recent years. Information amalgamated from both the survey and the listening session that will inform both the proposed interview questions and CMS' screening of candidates are as follows:

- “While recognizing any employment contract is an ongoing professional relationship, communication to a prospective candidate should reflect a strong community desire for a commitment to the City in the best interest of residents and visitors who recreate or do official business in Montana’s Capitol.”
- “A successful candidate should have knowledge of Montana and Helena to not only serve the City Commission and City workforce but also in discussions with business owners, non-profits and residents.”
- “Strong budgetary experience and the ability to give cogent counsel on any long-term project that may impact the City’s financial obligations into the future.”
- “A strong focus on core City functions of infrastructure, public safety and livability (public spaces, sanitation, environmental health etc.)”
- “Transparency, citizen participation and availability to the community.”
- “Demonstrated problem solving abilities rather than problem identification without evaluable outcomes.”
- “An understanding of mental health realities within the community and the City’s first responders connection to these issues.”
- “A recommendation the process include a background check of finalist candidates.”

Both the survey and the listening session requested additional opportunities for public input, as well as requests the recruitment process be extended into the next Commission’s term. The summary of the listening session is as follows:

## Purpose of the Session

The listening session was organized as an informal, open forum to gather community input during the City's recruitment process for a new **City Manager**, following the retirement announcement of Tim Burton. CMS, the consulting firm managing the recruitment, provided updates on the hiring timeline, applicant pool, and public engagement efforts. Community members had the opportunity to share feedback, concerns, and suggestions directly with CMS representatives.

With City Manager Tim Burton set to retire, CMS has launched a national recruitment campaign that has already attracted over 60 applicants, with 28 fully meeting qualifications. Screening of candidates begins November 5, 2025, with finalists to be presented to the Helena City Commission for interviews and selection.

## Key Takeaways from the Listening Session:

- **Community Priorities Identified:** Residents emphasized fiscal responsibility, infrastructure improvements, local knowledge of Helena and Montana, and a transparent, inclusive management style. Residents also highlighted previous short-term city manager tenures.
- **Concerns About Process Speed:** Participants voiced concerns that the hiring timeline may be moving too quickly—particularly with a new mayor and commissioner taking office soon. Community members advocated for deeper public engagement and possible extension into 2026.
- **Call for Retention and Stability:** Citizens urged CMS and the Commission to prioritize candidates committed to Helena long-term, expressing concern over recent short-term tenures in the city manager role.
- **Desire for Hybrid Access & Inclusive Engagement:** Feedback highlighted the absence of hybrid (Zoom/virtual) participation options and the lack of Commissioner attendance at the session, calling for more robust public input opportunities.
- **Public Participation:** Citizens asked for more **formal avenues** to give input during finalist interviews. CMS confirmed plans for **public Q&A events** with each finalist and stated that all public input will be forwarded to the Commission.
- **Cultural Shifts Desired:** Participants described Helena's internal culture as overly procedural and expressed hope for a new city manager focused on problem-solving, proactivity, and breaking down bureaucratic silos—especially regarding affordable housing and infrastructure. Speakers advocated for a City Manager who embraces creative problem-solving, collaboration, and internal culture change.

## Survey Feedback Highlights:

From over 120 responses (as of 3:25pm Oct 30):

- Top leadership qualities desired: **Integrity, accountability, strategic vision, collaboration, and inclusive communication.**
- Top community priorities: **Infrastructure, financial management, affordable housing, and transparent governance.**

- Comments like: "A person who has worked in management in a community the size and make-up of Helena would likely be more successful as our City Manager than a person from a major metropolitan area." AND "A city manager will have to balance visionary leadership and a willingness to be bold with the ability to build effective relationships and not be seen as an 'outsider.'"

**What's Next:**

- **Candidate Screening Begins:** November 5, 2025
- **Finalist Interviews & Public Events:** CMS will coordinate formal Q&A sessions and meet-and-greet opportunities with finalists to ensure community voices are included in the final stages.
- **Hiring Timeline:** While there is no fixed deadline, the Commission-approved working plan aims for a final decision by mid-December, with a potential onboarding in early 2026—timing subject to candidate availability and public feedback.

**For more information or to participate in future sessions,** please visit [helenaMT.gov](https://helenaMT.gov) or contact the City Clerk's office.

Leadership Assessment Report  
Chief Operations Officer  
Candidate: Leadership Candidate

ACME Health

## **Leadership Candidate - Leadership Analysis Report Executive Summary**

### **Chief Operations Officer Candidate**

#### **Introduction**

This report has been prepared as part of a comprehensive leadership evaluation process for the Chief Operations Officer (COO) role at ACME Health. It integrates multiple data points—including the WHY.os Discovery assessment, the Thomas-Kilmann Conflict Mode Instrument (TKI), the Hogan Leadership Forecast Series (Potential, Challenge, and Values reports), and a structured leadership interview—to provide an objective and thorough understanding of the candidate's leadership profile. The intent of this report is not to make a recommendation, but to offer informed insights that will support the CEO in selecting the candidate who best aligns with the organization's current and future leadership needs.

This report is based on data provided directly by the candidate and interpreted through the lens of executive leadership development, with specific consideration of ACME Health's 24 executive leadership attributes.

#### **Leadership Candidate**

##### **Candidate for Chief Operations Officer | ACME Health**

Leadership Candidate presents as an exceptionally driven and emotionally resilient healthcare operations leader with remarkable systematic thinking capabilities and proven crisis management expertise. Her assessment data and interview responses reveal a composed executive with significant strengths in logical innovation, operational excellence, and results-driven execution. Her unique ability to improve complex healthcare systems by making them both better and more understandable—evidenced through her Better Way + Simplify + Make Sense WHY.os profile—positions her well for systematic operational leadership.

However, her comprehensive Hogan assessment reveals critical interpersonal and collaborative leadership limitations that represent fundamental barriers to healthcare operations success. Her profile shows deficits in relationship building (Interpersonal Sensitivity: 4th percentile), team engagement (Sociability: 10th percentile), and collaborative values (Affiliation: 1st percentile) that conflict directly with healthcare's service-oriented, stakeholder-intensive environment. These limitations, combined with high-risk derailers in communication (Reserved: 96th percentile) and passive resistance (Leisurely: 88th percentile), may create substantial concerns about her ability to build the collaborative relationships essential for healthcare operations leadership.

While Leadership Candidate demonstrates exceptional operational capabilities and crisis management expertise, her interpersonal limitations represent such significant barriers to healthcare

leadership effectiveness that they may fundamentally limit her suitability for senior executive roles requiring extensive stakeholder collaboration, team engagement, and service-oriented culture development. Her natural strengths in systematic problem-solving and operational excellence provide value, but the extensive development required to address core interpersonal deficits may not be practical or achievable within reasonable timeframes for executive-level responsibilities.

## Leadership Strengths

**Exceptional Emotional Stability and Crisis Management** Leadership Candidate's high Adjustment (74%) combined with demonstrated crisis leadership during equipment failures and facility challenges shows exceptional composure under pressure. Her ability to coordinate complex multi-stakeholder solutions while managing extended timelines and stakeholder emotions validates her capacity for healthcare operations crisis management during genuine emergencies.

**Strong Achievement Drive and Results Orientation** Her high Ambition (84%) creates a powerful capability for healthcare operations transformation. Her proven ability to challenge "the way things are" and implement systematic improvements—demonstrated through successful provider experience initiatives and workflow optimization projects—positions her for driving operational excellence and performance accountability.

**Independent Decision-Making and Operational Discipline** Very low Dutiful tendencies (12th percentile) combined with high emotional stability enables her to make difficult operational decisions without being swayed by social pressure or politics—essential for healthcare operations requiring unpopular but necessary choices based on logical analysis and operational requirements.

**Systematic Problem-Solving and Process Innovation** Her WHY.os profile of Better Way + Simplify + Make Sense ensures she can take complicated operational processes and make them both better AND simpler, as evidenced through her holiday scheduling innovation and systematic approach to provider experience transformation, creating sustainable improvements that teams can understand and maintain.

**Practical Innovation with Calculated Risk Management** Her willingness to take calculated risks for operational improvement—demonstrated through scheduling innovations and systematic pilot approaches—combined with balanced Prudence (36th percentile) allows flexibility while maintaining operational standards essential for healthcare environments.

## Leadership Challenges & Growth Opportunities

**Severe Interpersonal and Relationship Management Limitations** Leadership Candidate's Interpersonal Sensitivity score at the 4th percentile represents a potential deficit in concern for others' feelings and social impact. Combined with Sociability at the 10th percentile, this may create fundamental barriers to building collaborative relationships essential for healthcare

operations success. She may appear hard-nosed, bulldozer-like, and insensitive in pursuing operational agenda, potentially alienating physicians, clinical staff, and external partners critical for operational effectiveness.

**Critical Communication and Stakeholder Engagement Risks** Her Reserved score at the 96th percentile represents the highest possible risk for appearing unconcerned with others' feelings and withdrawing under pressure. This, combined with extremely low Affiliation values (1st percentile), suggests she may create isolated, non-collaborative work environments and struggle significantly with the extensive stakeholder management required for healthcare operations leadership.

**Healthcare Culture and Values Misalignment** Her very low Altruistic values (17th percentile) conflict directly with healthcare's service-oriented mission and patient-focused culture. She may prioritize financial results over patient care considerations and appear unconcerned about staff well-being, creating culture misalignment that could undermine organizational effectiveness and staff engagement.

**Passive Resistance and Operational Undermining Risks** High Leisurely risk (88th percentile) suggests potential for passive resistance and procrastination when feeling criticized or undervalued, which could undermine operational initiatives. Combined with moderate Skeptical tendencies (72nd percentile), this could create cynical operational climate resistant to necessary improvements and damage trust with key stakeholders.

**Team Leadership and Development Deficits** Her combination of very low sociability, minimal affiliation values, and high reserved risk suggests poor team building capabilities. She may not provide adequate feedback, recognition, or support to staff, and could fail to develop and engage the teams necessary for operational success in healthcare environments requiring high collaboration and service orientation.

## Fit for the Chief Operations Officer Role

Leadership Candidate's comprehensive assessment reveals a fundamental mismatch between her exceptional operational capabilities and the interpersonal requirements essential for healthcare operations leadership success. While she demonstrates remarkable strengths in systematic problem-solving, crisis management expertise, and results-driven execution that would serve certain operational functions exceptionally well, her severe interpersonal limitations create unacceptable risks for senior healthcare leadership roles requiring extensive stakeholder collaboration and service-oriented culture development.

Healthcare operations leadership demands continuous engagement with physicians, clinical staff, department heads, external partners, and community stakeholders—areas where Leadership Candidate's natural tendencies toward isolation, task-focus over people-focus, and minimal concern for others' feelings work directly against fundamental success requirements. Her low interpersonal sensitivity, combined with minimal collaborative values and high communication risks, may damage

critical relationships essential for operational effectiveness, while her low altruistic orientation conflicts with healthcare's patient-centered mission and service culture.

The extensive interpersonal development required would involve fundamental changes to core personality characteristics around empathy, collaboration, and service orientation that may not be practical or achievable within reasonable timeframes for executive responsibilities, particularly given the relationship damage and cultural misalignment risks that could occur during such an intensive development period.

Leadership Candidate's greatest value to ACME Health lies in leveraging her exceptional systematic thinking, operational discipline, and crisis management capabilities in senior operational management roles with reduced interpersonal demands—such as process improvement, analytics, or project management positions—where her task-focused approach becomes advantageous rather than limiting, allowing the organization to benefit from her operational excellence while avoiding the significant risks inherent in placing her in roles requiring extensive collaborative leadership and stakeholder relationship management.

## **Final Consideration**

### **Strengths for Healthcare Operations Leadership:**

- Exceptional logical innovation and systematic optimization capabilities for healthcare operations transformation
- Outstanding crisis management and operational resilience during high-pressure situations with proven track record
- Results-driven execution with ability to balance competing demands through practical negotiation and stakeholder coordination
- Independent decision-making authority without social pressure or political influence, enabling tough operational choices
- Systematic problem resolution preventing small issues from becoming organizational failures through proactive engagement
- Strategic problem-solving with practical implementation creating sustainable improvements that teams can understand and maintain

### **Critical Development Needs for Executive Success:**

- Intensive Interpersonal Skills Development - Address severe empathy and relationship building deficits
- Healthcare Culture Integration - Develop service orientation to align with healthcare mission
- Collaborative Leadership Capabilities - Build team engagement and collaborative skills
- Communication and Stakeholder Management - Improve diplomatic communication and relationship building
- Passive Resistance Management - Address procrastination and commitment consistency issues



- Strategic Vision Development - Enhance innovation and transformational change leadership capabilities

## CEO Consideration Statement

Leadership Candidate presents a complex leadership profile that combines exceptional operational capabilities with fundamental interpersonal limitations that create potential risks for healthcare operations leadership. Her systematic problem-solving expertise, crisis management capabilities, and results-driven execution represent valuable operational assets, but her deficits in relationship building, collaborative leadership, and healthcare culture alignment may fundamentally limit her effectiveness in senior executive roles.

Healthcare operations leadership requires extensive stakeholder collaboration, team engagement, and service-oriented culture development—areas where Leadership Candidate's natural tendencies may work directly against success requirements. Her interpersonal sensitivity at the 4th percentile, combined with minimal interest in collaboration (1st percentile affiliation) and high communication risks (96th percentile Reserved), could potentially create barriers that may be insurmountable within practical development timeframes for executive responsibilities.

While Leadership Candidate's operational strengths could drive significant improvements in systematic processes and crisis management, the relationship damage and cultural misalignment risks during her development period could harm critical stakeholder relationships, staff engagement, and organizational culture essential for healthcare operations success. The extensive coaching required to address core personality characteristics around empathy and collaboration may not be achievable within reasonable executive effectiveness timelines. Her exceptional capabilities in systematic thinking, operational discipline, and practical problem-solving could provide significant value in senior operational management roles with reduced interpersonal demands, such as process improvement, analytics, or project management positions where her task-focused approach becomes advantageous rather than limiting.

This represents a high-risk profile for the COO position where the potential for relationship damage and cultural disruption outweighs the operational benefits, despite her notable systematic and crisis management capabilities. Her greatest value to ACME Health may lie in leveraging her operational excellence in roles with limited stakeholder management requirements while avoiding the interpersonal risks inherent in senior healthcare leadership positions requiring extensive collaboration and service-oriented culture development.

## **Leadership Candidate - Leadership Analysis Report Detailed Reports Summary**

### **Leadership Candidate - WHY.os Analysis Summary**

#### **Chief Operations Officer Candidate**

##### **Overview**

The WHY.os Discovery assessment reveals the core motivational drivers that fuel Leadership Candidate's leadership approach and decision-making patterns. This analysis examines how her unique combination of WHY (Better Way), HOW (Simplify), and WHAT (Make Sense) aligns with the Chief Operations Officer role at ACME Health and the organization's 24 executive leadership attributes.

##### **Leadership Candidate's Unique WHY.os Profile**

**WHY: Better Way** - Driven to improve and find superior solutions

**HOW: Simplify** - Clarifies complexity and removes unnecessary complications

**WHAT: Make Sense** - Solves problems and creates understanding from complexity

This represents an exceptionally powerful combination for healthcare operations leadership, positioning Leadership Candidate as a natural systems optimizer who improves complex healthcare delivery by making it both better and more understandable.

##### **Core Strengths Aligned with ACME Health Leadership Attributes**

###### **Strategic Problem-Solving with Innovation**

Leadership Candidate's Better Way WHY combined with Make Sense WHAT creates exceptional alignment with ACME Health's Problem-Solving Skills, Strategic Mindset, and Innovation Drive attributes. Her natural ability manifests as:

- Identifying improvement opportunities others miss in complex healthcare systems
- Solving operational problems while simultaneously making processes superior
- Challenging existing systems with clear, logical alternatives that advance organizational goals
- Driving innovation that makes practical sense for healthcare delivery and patient outcomes

###### **Complexity Mastery Through Simplification**

Her Simplify HOW strongly supports ACME Health's Adaptability, Continuous Learning, and Financial Acumen requirements through:

- Taking complicated operational processes and making them both better AND simpler
- Removing unnecessary steps that slow down patient care while improving outcomes

- Creating clear pathways through regulatory and administrative complexity
- Helping teams understand not just what to do, but why it's a better approach

### **Logical Innovation Leadership**

Leadership Candidate's combination creates exceptional alignment with Visionary Thinking, Decisiveness, and Mission-Focused attributes:

- Every improvement proposed will make clear, rational sense to stakeholders
- Natural elimination of solutions that are better but too complex to implement effectively
- Creation of sustainable improvements because they're both superior and understandable
- Building confidence in change because people can see logical reasoning behind decisions

### **Additional Attribute Alignments**

**Strong Communication:** Her Make Sense + Simplify combination enables clear, logical communication that helps others understand complex operational concepts.

**Leadership Focused:** Better Way WHY drives development of others through systematic thinking and improvement methodologies.

**Patient-Centric Focus:** Her drive to find better ways naturally filters through "how does this improve patient care and outcomes?"

**Collaborative:** Simplify HOW creates inclusive approaches by making complex ideas accessible to diverse stakeholders.

### **Potential Challenges and Development Areas**

#### **The "Obvious Solution" Assumption**

Leadership Candidate's ability to see better, simpler solutions may create challenges with Emotional Intelligence and Empathy attributes if she assumes others should see solutions as clearly:

- Need to slow down to explain reasoning - what's obvious to her may not be to others
- Building understanding before implementing changes rather than assuming logical clarity
- Avoiding frustration with slower adopters who don't process improvements as quickly
- Documenting thinking processes so others can follow problem-solving approaches

#### **Over-Simplification of Complex Relationships**

Her drive to simplify may underestimate complexity of human dynamics, potentially impacting Stakeholder Management and Cultural Competency:

- Recognizing that people aren't processes - relationships require different approaches than systems
- Engaging stakeholders in solution development rather than presenting finished improvements
- Considering emotional and political factors alongside logical ones
- Building coalition support for changes rather than relying solely on logical arguments

## **Innovation Impatience**

Better Way drive combined with logical thinking may create challenges with Patience and Resilience when facing resistance:

- Understanding that "better" is subjective - others may value different aspects
- Allowing time for change adoption even when logic is clear
- Developing change management skills to help others embrace improvements
- Practicing patience with those who need more time to see benefits

## **Strategic Implications for COO Role**

### **Operational Excellence Through Logical Innovation**

Leadership Candidate's WHY.os combination positions her exceptionally well for healthcare operations transformation:

- Identifying improvement opportunities that make both logical and practical sense
- Simplifying complex systems while making them more effective for patient care
- Creating solutions that teams can understand, implement, and sustain independently

### **Team Development and Leadership Growth**

Her profile suggests strong potential for developing operational leaders:

- Teaching others problem-solving methodology rather than just providing solutions
- Creating simple frameworks that help teams identify and implement improvements
- Ensuring solutions empower teams to continue improving independently

### **Strategic Partnership Capabilities**

Her combination suggests excellent strategic partnership potential:

- Translating complex strategic initiatives into simple, logical action plans
- Continuously improving organizational effectiveness through systematic thinking
- Ensuring all improvements make clear sense for ACME Health's mission and goals

## **Relationship Dynamics and Cultural Fit**

### **Strengths for ACME Health Culture:**

- Clinical staff will appreciate logical, evidence-based improvements that reduce administrative burden
- Administrative teams will be energized by removal of unnecessary complexity from daily work
- Leadership team will benefit from systematic approach to operational challenges

### **Potential Friction Points:**

- Team members preferring familiar processes over logical improvements may need additional support
- Those requiring more emotional connection to change rather than just logical arguments
- Staff who may feel overwhelmed by pace of systematic improvements without proper change management

## **Recommendations for Success**

### **Immediate Integration Focus:**

- Develop change communication skills to help others see logic behind improvements
- Create stakeholder engagement processes to build buy-in for logical changes
- Build emotional intelligence to connect with people who need more than logic to embrace change

### **90-Day Strategy:**

- Listen and learn existing processes before proposing improvements
- Identify 2-3 high-impact improvements demonstrating clear logical benefits
- Build relationships with key stakeholders who will champion systematic changes

### **Long-Term Development:**

- Focus on developing systematic thinking in others rather than being sole problem-solver
- Create sustainable improvement processes that continue beyond direct involvement
- Balance logical arguments with emotional engagement for broader organizational buy-in

## **CEO Consideration Statement**

Leadership Candidate 's WHY.os profile demonstrates exceptional alignment with ACME Health's operational transformation needs. Her Better Way + Simplify + Make Sense combination positions her to drive systematic operational excellence while maintaining strong mission alignment. Her natural ability to improve complex systems, simplify processes, and create logical solutions directly supports multiple ACME Health leadership attributes including Innovation Drive, Problem-Solving Skills, Strategic Mindset, and Continuous Learning.

Success will depend on her ability to channel these strengths while developing stakeholder engagement and change communication capabilities. This profile suggests a leader who will not only implement operational improvements but build a culture of logical innovation and systematic thinking throughout ACME Health, creating sustainable competitive advantages through intelligent simplification and evidence-based decision-making.

## Leadership Candidate - TKI Conflict Style Analysis

### Chief Operations Officer Candidate

#### Overview

The TKI assessment evaluates how leaders handle conflict across five modes: Competing, Collaborating, Compromising, Avoiding, and Accommodating. Each mode has strengths and risks, especially in leadership roles that require decisive action, team development, cross-functional collaboration, and organizational adaptability. Leadership Candidate 's TKI profile reveals a leader exceptionally well-suited for the Chief Operations Officer role at ACME Health, with conflict management approaches that align strongly with systematic operational leadership and continuous improvement initiatives.

#### Conflict Style Profile

##### Compromising: High (75%)

Leadership Candidate demonstrates exceptional skill in finding practical, workable solutions that make logical sense to all parties involved. She views conflict as an opportunity to create better systems through negotiation and practical problem-solving.

##### Strengths:

- Systematic problem resolution critical for addressing complex operational challenges with multiple variables and stakeholders
- Resource optimization excellence in balancing competing departmental needs through logical analysis and fair allocation
- Natural vendor and contract management abilities for agreements that create mutual value and operational efficiency
- Process improvement leadership finding practical compromises that improve systems while maintaining stakeholder buy-in
- Regulatory compliance balance with efficient approaches satisfying requirements while maintaining operational flow
- Crisis management capability to quickly develop workable solutions during operational emergencies

##### Risks:

- Strategic vision protection - must ensure operational compromises don't undermine ACME Health's long-term strategic objectives
- Innovation dilution risk of compromising breakthrough improvements for the sake of immediate consensus
- Quality standards maintenance need to preserve non-negotiable standards around patient safety and clinical excellence

- Change initiative momentum may slow down necessary operational transformations to achieve universal agreement

**Accommodating: Medium (62%)**

Leadership Candidate shows balanced willingness to defer to others when it serves the greater good, demonstrating strategic flexibility without being overly self-sacrificing.

**Strengths:**

- Clinical expertise respect with appropriate deference to medical staff knowledge and clinical decision-making autonomy
- Subject matter expert integration willing to accommodate specialist recommendations in areas outside her direct expertise
- Relationship investment using strategic accommodation to build long-term partnerships with key stakeholders
- Learning-oriented leadership demonstrating humility and willingness to adapt when presented with better information
- Conflict de-escalation capability to reduce operational tensions through strategic accommodation when appropriate

**Risks:**

- Operational standards enforcement must maintain firm standards around safety, quality, and regulatory compliance
- Resource discipline cannot accommodate all requests when resources are constrained or strategic priorities conflict
- Leadership authority risk of undermining executive presence if accommodation is perceived as weakness
- Performance management may struggle with difficult personnel decisions requiring firm, non-accommodating stances

**Competing: Medium (57%)**

Leadership Candidate demonstrates balanced assertiveness, using competitive approaches when logical analysis supports the need for firm action. She competes strategically rather than habitually.

**Strengths:**

- Strategic assertiveness when patient safety, quality standards, or organizational sustainability is at stake
- Performance management with appropriate level of assertiveness for addressing performance issues and accountability
- Budget discipline capability to make tough financial decisions when logical analysis supports necessary cuts or reallocations

- Vendor management with balanced approach to contract negotiations that protects organizational interests
- Emergency leadership can take charge during crises when immediate, authoritative decisions are required

**Risks:**

- Relationship impact assessment may need to consider emotional and political factors alongside logical ones
- Change resistance management could struggle when logical solutions face irrational or emotional resistance
- Stakeholder engagement may need support in building coalition support for competitive decisions
- Long-term relationship preservation risk of damaging important partnerships through overly logical approaches

**Collaborating: Medium (41%)**

Leadership Candidate shows moderate collaborative tendencies, engaging in collaborative problem-solving when it serves operational efficiency and logical outcomes.

**Strengths:**

- Strategic collaboration engaging in collaborative problem-solving when it will produce superior operational outcomes
- Cross-departmental integration facilitating collaboration between departments when logical analysis supports the need
- Quality improvement leadership willing to invest time in collaborative approaches for complex operational improvements
- Innovation development engaging teams in collaborative innovation when breakthrough solutions are needed

**Risks:**

- Time investment analysis may under-invest in collaborative approaches that could produce superior long-term outcomes
- Stakeholder buy-in building could miss opportunities to build stronger commitment through collaborative processes
- Team development may not fully utilize collaborative approaches for developing leadership capabilities in others
- Complex problem solving risk of moving too quickly to compromise rather than exploring collaborative breakthroughs

**Avoiding: Low (22%)**



Leadership Candidate rarely sidesteps conflict, preferring to engage directly with operational issues and address problems systematically.

**Strengths:**

- Proactive problem-solving addressing operational issues before they escalate into major organizational challenges
- Direct communication engaging with difficult conversations around performance, compliance, and operational efficiency
- Issue resolution preventing small operational problems from becoming systematic organizational failures
- Transparency culture modeling direct engagement that encourages staff to surface issues early for resolution
- Operational efficiency maintaining focus on addressing problems rather than allowing them to persist and compound

**Risks:**

- Strategic timing considerations could engage in conflicts when allowing time for stakeholder preparation might be more effective
- Operational overload may take on too many issues simultaneously without proper prioritization or delegation
- Relationship management could damage important partnerships by engaging too directly without considering emotional factors
- Change management pace may push for problem resolution faster than organizational culture can accommodate

**Implications for the Chief Operations Officer Role****Exceptional Strengths for Healthcare Operations Leadership**

**Systematic Operations Management:** Leadership Candidate's exceptional compromising skills combined with direct engagement make her ideally suited for managing the complex, systematic challenges that define healthcare operations. She can effectively balance competing operational demands while maintaining focus on logical, efficient solutions that serve organizational objectives.

**Process Improvement and Operational Excellence:** The combination of her pragmatic problem-solving approach and direct engagement with issues positions her exceptionally well to lead continuous improvement initiatives and operational transformation. Leadership Candidate can identify inefficiencies, develop logical solutions, and implement changes while building necessary stakeholder support.

**Resource Optimization and Financial Management:** Her balanced assertiveness and practical negotiation skills align perfectly with the resource management challenges facing healthcare

organizations. Leadership Candidate can make tough financial decisions, optimize resource allocation, and negotiate vendor relationships while maintaining operational effectiveness.

**Crisis Management and Emergency Response:** Her willingness to engage directly with problems, combined with her ability to find practical solutions quickly, positions her exceptionally well for the unpredictable nature of healthcare operations. Leadership Candidate can coordinate emergency responses while developing logical, systematic solutions.

## **Development Opportunities and Strategic Considerations**

**Enhanced Collaborative Leadership:** Leadership Candidate should develop greater comfort with collaborative approaches when operational improvements require extensive stakeholder buy-in and team development, particularly for:

- Complex change management initiatives requiring broad organizational support
- Cross-departmental integration projects needing diverse expertise
- Quality improvement initiatives benefiting from frontline staff input
- Strategic planning processes requiring comprehensive stakeholder engagement

**Relationship-Centered Decision Making:** Learning to balance logical analysis with emotional and political considerations could enhance her effectiveness in situations requiring:

- Managing physician relationships and clinical staff engagement
- Building coalition support for operational changes
- Navigating board and community stakeholder relationships
- Leading through organizational culture transformation

**Strategic Patience and Timing:** Developing skills in strategic timing and selective engagement could help her manage the complex pace of healthcare transformation, including:

- Allowing time for stakeholder preparation and buy-in building
- Sequencing operational changes for maximum effectiveness
- Building sustainable change momentum rather than pushing for immediate resolution
- Balancing urgency with thoroughness in complex decision-making

## **CEO Consideration Statement**

Leadership Candidate 's TKI profile demonstrates alignment with the Chief Operations Officer role at ACME Health. Her natural ability to find practical solutions to complex problems, engage directly with operational challenges, and maintain systematic focus on organizational effectiveness makes her uniquely well-suited for the demanding operational leadership requirements of healthcare management.

Her strongest assets—systematic problem-solving, direct engagement with operational challenges, and practical negotiation skills—are precisely the capabilities most critical for successful healthcare operations management. With targeted development in collaborative leadership and stakeholder

relationship management, Leadership Candidate has potential to be successful as ACME Health's Chief Operations Officer.

Her conflict style is particularly well-suited for the logical, efficiency-focused approach required in healthcare operations while maintaining the engagement necessary for timely problem resolution. Her leadership style will create a systematic operational culture that values logical problem-solving and continuous improvement while maintaining focus on practical results—particularly valuable in healthcare settings where operational efficiency and systematic excellence are critical to both patient outcomes and organizational sustainability.

## **Comprehensive Hogan Assessment Summary: Leadership Candidate**

### **Chief Operations Officer Candidate - ACME Health**

#### **EXECUTIVE SUMMARY**

Leadership Candidate's comprehensive Hogan assessment reveals a leader with strong operational capabilities and achievement drive, but potential concerns regarding interpersonal effectiveness and team leadership. While she demonstrates exceptional emotional stability, competitive ambition, and results orientation, her profile shows potential weaknesses in relationship building and communication that could seriously limit her effectiveness in senior healthcare leadership requiring stakeholder collaboration and team engagement.

**Overall Assessment:** Leadership Candidate presents as a highly capable individual contributor with strong technical and results-focused capabilities, but significant gaps in the interpersonal and collaborative skills essential for senior healthcare operations leadership.

#### **INTEGRATED PROFILE ANALYSIS**

##### **Core Leadership Strengths**

###### **1. Exceptional Emotional Stability (Potential: Adjustment 74%)**

- Strong composure under pressure with consistent, steady leadership approach
- Maintains optimism and confidence during challenging situations
- Handles stress well and provides stabilizing influence during crises
- Projects resilience and reliability that others can count on

###### **2. Strong Achievement Drive (Potential: Ambition 84%)**

- Highly competitive and eager to advance in leadership roles
- Takes initiative and enjoys being in charge of complex projects
- Willing to make decisions even with incomplete information
- Pushes herself and others to achieve ambitious goals and exceed expectations

###### **3. Independent Decision-Making (Challenge: Low Dutiful 12%)**

- Comfortable making independent decisions without excessive approval-seeking
- Willing to challenge business assumptions and take unpopular positions
- Not afraid of conflict and willing to confront poor performers
- Advocates for staff and operational needs even when challenging authority

###### **4. Practical Problem-Solving (Potential: Low Inquisitive 12%)**

- Focuses on tried-and-true, practical solutions rather than abstract concepts

- Stays on task and remains focused even with repetitive problems
- Provides sensible, grounded advice and realistic decision-making
- Good "sounding board" for evaluating new ideas for practical implementation

#### **5. Balanced Learning Orientation (Potential: Learning Approach 57%)**

- Appropriately interested in staying current with business and technology developments
- Sees education as practical tool for improving job performance
- Learns quickly when relevance is clear
- Supports staff development and training opportunities

### **Potential Critical Risk Factors**

#### **1. Severe Interpersonal Limitations (Potential: Interpersonal Sensitivity 4%)**

- Potential for low concern for others' feelings and social impact
- May be willing to take unpopular positions without considering relationship consequences
- May seem hard-nosed, tough, and bulldozer-like in pursuing agenda
- Lacks compassion and may prioritize tasks over people consistently

#### **2. Social Isolation Tendencies (Potential: Sociability 10%)**

- Strong preference for working alone rather than in teams
- May be reluctant to initiate contact with others or build networks
- May appear reserved, aloof, and unenthusiastic about people and projects
- A tendency to give minimal feedback and avoids social interactions

#### **3. Communication and Relationship Risks (Challenge: Reserved 96%)**

- Potential high risk for appearing unconcerned with others' feelings
- May seem tough, blunt, and intimidating in communications
- Tends to withdraw and stop communicating under pressure
- May risk of misreading social cues and unintentionally bruising feelings

#### **4. Skepticism and Trust Issues (Challenge: Skeptical 72%)**

- Moderate risk of being overly suspicious of others' motives
- May appear argumentative and focus on flaws rather than strengths
- May take criticism personally and could hold grudges
- Could be hard to coach due to defensive tendencies

#### **5. Passive Resistance Under Pressure (Challenge: Leisurely 88%)**

- Potential risk of appearing cooperative while being passively resistant
- May procrastinate or drag feet when feeling criticized or disrespected
- Could blame others for inability to meet deadlines under stress
- May not follow through if personal relevance isn't clear

## VALUES-DRIVEN LEADERSHIP PROFILE

Leadership Candidate's values profile creates several concerning patterns for healthcare leadership:

### Primary Value Drivers:

#### Tradition (75th percentile) - Highest Value

- Strong preference for formal structures, authority, and established procedures
- Values conformity to accepted rules and professional behavior
- May resist innovation or unconventional approaches
- Could be suspicious of change and diversity initiatives

#### Commerce (61st percentile)

- Strong focus on financial performance and competitive results
- Values task-oriented, professional work environments
- May push team to beat competition and rigorously evaluate performance
- Could favor high-risk, high-reward strategies

### Lower Value Patterns:

#### Extremely Low Affiliation (1st percentile)

- Minimal interest in social contact or collaborative work
- Prefers to work alone and avoid meetings and team activities
- May assume others want to be left alone and don't need feedback
- Could create isolated, non-collaborative work environment

#### Very Low Altruistic (17th percentile)

- Limited concern for helping others or addressing staff problems
- Values self-reliance and may disapprove of those seeking help
- Makes decisions based on logic rather than considering people's feelings
- Could appear unconcerned about corporate social responsibility

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## IMPLICATIONS FOR COO ROLE

### Watchouts for Healthcare Operations:

#### 1. Stakeholder Relationship Management

- Low interpersonal sensitivity may damage relationships with physicians, clinical staff, and external partners
- May appear uncaring or insensitive in patient-focused healthcare environment
- Risk of alienating key stakeholders through blunt, task-focused communication

- Could struggle with the collaborative relationships essential for healthcare operations

## **2. Team Leadership and Development**

- Very low sociability and affiliation values may suggest poor team building capabilities
- May not provide adequate feedback, recognition, or support to staff
- Risk of creating isolated, non-collaborative work environment
- Could fail to develop and engage the teams necessary for operational success

## **3. Healthcare Culture Misalignment**

- Low altruistic values may conflict with healthcare's service-oriented mission
- May prioritize financial results over patient care considerations
- Could appear insensitive to staff well-being and morale issues
- Risk of creating culture that doesn't align with healthcare values

## **4. Communication and Influence Limitations**

- High reserved risk may suggest poor communication under pressure
- May struggle to influence without formal authority
- Could have difficulty building consensus for operational changes
- Risk of appearing intimidating or unapproachable to clinical staff

## **5. Change Management Challenges**

- High traditional values may resist necessary healthcare innovations
- Passive resistance tendencies could undermine change initiatives
- May not effectively communicate rationale for operational changes
- Could struggle with the relationship-building necessary for successful change

## **Potential Strengths in Structured Environment:**

### **1. Results-Driven Performance**

- Strong achievement orientation drives operational results
- Comfortable making tough decisions and holding people accountable
- Independent decision-making reduces delays and bureaucracy
- Financial focus aligns with operational efficiency requirements

### **2. Crisis Leadership**

- Exceptional emotional stability during healthcare emergencies
- Willing to take unpopular positions when operationally necessary
- Practical problem-solving approach for urgent operational issues
- Not intimidated by pressure or criticism from stakeholders

### **3. Operational Discipline**

- Values structure, procedures, and professional behavior
- Focuses on practical solutions rather than getting distracted by abstractions
- Maintains high standards for performance and accountability
- Comfortable with hierarchical structures common in healthcare

## **DEVELOPMENT REQUIREMENTS FOR SUCCESS**

### **Critical Development Priorities:**

#### **1. Interpersonal Skills and Emotional Intelligence**

- Intentional coaching in empathy, compassion, and relationship building
- Training in reading social cues and understanding impact on others
- Development of communication skills that consider others' feelings
- Practice in collaborative decision-making and consensus building

#### **2. Team Leadership and Engagement**

- Coaching in team building, motivation, and staff development
- Training in providing feedback, recognition, and support
- Development of skills for creating collaborative work environments
- Practice in leading through influence rather than authority

#### **3. Healthcare Culture Adaptation**

- Education about healthcare's service mission and patient-focused values
- Training in balancing financial results with patient care considerations
- Development of understanding about healthcare stakeholder relationships
- Coaching in creating culture aligned with healthcare values

#### **4. Communication and Influence Skills**

- Training in diplomatic communication and conflict resolution
- Development of skills for building consensus and gaining buy-in
- Practice in presenting ideas in ways that consider others' perspectives
- Coaching in building networks and stakeholder relationships

### **Organizational Support Requirements:**

#### **1. Intentional Coaching and Supervision**

- Regular executive coaching focused on interpersonal effectiveness
- Close supervision of stakeholder interactions and team dynamics
- Feedback systems to monitor relationship quality and team engagement
- Support for developing collaborative leadership approach

#### **2. Structured Relationship Management**



- Clear expectations for stakeholder engagement and communication
- Systems for ensuring adequate team feedback and recognition
- Processes for collaborative decision-making and consensus building
- Support for building and maintaining key relationships

### **3. Cultural Integration Support**

- Mentoring from healthcare leaders who exemplify service values
- Exposure to patient care and clinical operations to understand mission
- Training in healthcare-specific stakeholder management
- Support for adapting leadership style to healthcare environment

## **RISK MITIGATION STRATEGIES**

### **For High-Risk Areas:**

#### **Interpersonal Limitations Management:**

- Provide intensive coaching in empathy and relationship building
- Create structured processes for stakeholder engagement
- Establish feedback systems to monitor relationship quality
- Pair with relationship-focused deputy or support staff

#### **Communication and Team Leadership:**

- Develop structured communication protocols and templates
- Provide training in collaborative leadership and team engagement
- Create systems for regular team feedback and recognition
- Establish clear expectations for team development activities

### **For Values Misalignment:**

#### **Healthcare Culture Integration:**

- Provide extensive orientation to healthcare mission and values
- Create opportunities for exposure to patient care and clinical operations
- Establish mentoring relationships with service-oriented healthcare leaders
- Develop understanding of how operational decisions impact patient care

## **FINAL ASSESSMENT**

### **Overall Suitability for COO Role: HIGH RISK**

Leadership Candidate 's Hogan profile reveals potential concerns that may make her unsuitable for the Chief Operations Officer role at ACME Health without extensive development and organizational support that may not be practical or effective.

### **Key Concerns:**

1. **Severe Interpersonal Limitations:** Extremely low interpersonal sensitivity and sociability create fundamental barriers to healthcare leadership effectiveness
2. **Values Misalignment:** Very low altruistic values that may conflict with healthcare's service mission and patient-focused culture
3. **Team Leadership Gaps:** Minimal interest in collaboration and team building that could limit her ability to lead complex healthcare operations
4. **Communication Risks:** High risk of appearing insensitive or uncaring in patient-focused healthcare environment
5. **Stakeholder Management:** May have a tendency to damage critical relationships with physicians, clinical staff, and external partners

**Factors for Success:** Success would require:

- Intentional executive coaching (minimum 18-24 months)
- Structured organizational support systems
- Close supervision and accountability
- Significant personal commitment to behavior changes
- Strong operational team to ensure consistent execution

#### **CEO Consideration:**

Leadership Candidate 's profile represents a potential mismatch for healthcare executive operations leadership. While she possesses strong technical and results-oriented capabilities, her limitations in interpersonal effectiveness, team leadership, and healthcare culture alignment may create unacceptable risks for the COO role.

Healthcare operations require leaders who can build collaborative relationships with diverse stakeholders, create engaging team environments, and balance operational efficiency with patient care values. Leadership Candidate's natural tendencies work directly against these requirements, making her unsuitable for this position despite her technical strengths.

The organization may be better served by identifying candidates whose natural interpersonal strengths and values alignment provide a foundation for healthcare leadership success, rather than attempting to fundamentally change core personality characteristics that are deeply ingrained and potentially resistant to development.

## Leadership Candidate - Hogan Potential Detail Report Summary

### Chief Operations Officer Candidate

#### Overview

The Hogan Potential Report assesses how individuals are likely to perform under typical conditions—when they are at their best. It focuses on the core competencies required for leadership success, offering insights into interpersonal effectiveness, decision-making, self-management, and strategic contribution. Leadership Candidate's profile reveals a highly driven and emotionally resilient leader with exceptional achievement orientation and practical focus, combined with significant challenges in interpersonal engagement and relationship building that will require strategic development for executive effectiveness.

#### Leadership Dimension Summary

##### 1. Intrapersonal Characteristics

**Adjustment: High (74%)** Leadership Candidate demonstrates strong emotional stability and composure under pressure. She maintains optimism and resilience during challenging situations, rarely allowing stress to impact her decision-making or operational focus.

##### Strengths:

- Outstanding crisis leadership and reliable emotional steadiness during operational emergencies
- Maintains clear thinking and logical analysis when others may become overwhelmed
- Projects confidence and self-assurance that inspires trust in her operational capabilities
- Provides stabilizing force for teams during high-pressure healthcare operational situations

##### Watchouts:

- May not recognize when others are stressed or struggling emotionally
- Potential to appear insensitive to team emotional needs during challenging periods
- Risk of dismissing negative feedback due to high confidence levels
- Could overlook personal mistakes or areas needing improvement

**Ambition: Very High (84%)** Leadership Candidate shows exceptional leadership drive and competitive achievement orientation. She actively seeks leadership positions and enjoys being in charge of complex operational challenges.

##### Strengths:

- Action-oriented with strong initiative and confident decision-making capabilities
- Competitive drive that pushes for operational excellence and continuous improvement
- Willing to take on challenging projects and lead during difficult operational situations

- Natural tendency to assume leadership roles and drive results through systematic execution

**Watchouts:**

- May intimidate less experienced team members or appear overly competitive with peers
- Could take on more operational responsibilities than manageable, leading to overcommitment
- Risk of making decisions too quickly without sufficient stakeholder consultation
- Potential to compete with colleagues rather than collaborate when appropriate

**Sociability: Very Low (10%)** Leadership Candidate demonstrates strong preference for independent work and minimal social interaction, preferring formal communication and task-focused approaches.

**Strengths:**

- Can make independent decisions without being swayed by social pressure or politics
- Maintains professional boundaries and gives team members space to work effectively
- Focuses on operational tasks and efficiency without social distractions
- Prefers formal, structured communication that ensures clarity and accountability

**Watchouts:**

- May struggle to build strong relationships with clinical staff and department heads
- Could appear distant or unapproachable to staff members, limiting influence and effectiveness
- Risk of missing opportunities for informal communication that supports operational success
- May not develop necessary organizational networks for senior executive effectiveness

**2. Interpersonal Characteristics**

**Interpersonal Sensitivity: Very Low (4%)** Leadership Candidate demonstrates minimal concern for interpersonal harmony, preferring direct, task-focused communication and decision-making based on logical analysis rather than relationship considerations.

**Strengths:**

- Addresses operational problems directly without hesitation or concern for popularity
- Enforces standards and accountability measures without being swayed by personal relationships
- Makes difficult decisions based on logical analysis rather than interpersonal considerations
- Provides clear, frank communication that ensures understanding and eliminates ambiguity

**Watchouts:**

- May damage critical relationships through overly direct or insensitive communication
- Risk of alienating clinical staff, physicians, and other essential healthcare stakeholders
- Could appear tough or uncaring, limiting ability to build collaborative operational culture
- May fail to consider emotional and political factors that impact operational effectiveness

**Prudence: Moderate (36%)** Leadership Candidate shows balanced approach to structure and flexibility, able to follow important procedures while adapting when operational circumstances require change.

**Strengths:**

- Balances operational structure with necessary flexibility for dynamic healthcare environments
- Follows important regulatory requirements while adapting procedures for efficiency
- Plans appropriately without being overly rigid in operational execution
- Delegates responsibly while maintaining appropriate oversight and accountability

**Watchouts:**

- May apply rules inconsistently across different operational situations, creating confusion
- Could miss important regulatory details when focusing on operational efficiency
- Risk of being too flexible with standards that require consistent enforcement
- May struggle with situations requiring either strict adherence or complete flexibility

### **3. Leadership and Problem Solving**

**Inquisitive: Very Low (12%)** Leadership Candidate demonstrates strong practical focus but minimal inclination toward innovation, strategic thinking, or exploring new operational approaches.

**Strengths:**

- Provides practical, realistic solutions using proven operational methods
- Excellent task focus and ability to concentrate on operational execution details
- Good at evaluating others' innovative ideas with realistic, practical perspective
- Focuses on operational implementation rather than getting distracted by theoretical concepts

**Watchouts:**

- Significant limitations in strategic innovation and transformational thinking
- Resistance to new technologies or operational approaches that could improve efficiency
- May miss strategic opportunities requiring creative or visionary operational thinking
- Limited curiosity about alternative solutions or emerging healthcare operational practices

**Learning Approach: Moderate (57%)** Leadership Candidate shows balanced interest in learning, viewing education as a practical tool for improving operational effectiveness rather than pursuing knowledge for its own sake.

**Strengths:**

- Focuses on practical learning that directly improves operational performance and results
- Stays appropriately current with healthcare operations best practices and industry developments
- Balances formal education with hands-on experience for comprehensive skill development

- Communicates factually and directly, ensuring clear understanding of operational requirements

**Watchouts:**

- May not pursue broader educational opportunities that enhance strategic leadership capabilities
- Could miss learning opportunities that don't have immediate operational application
- Risk of limiting development to tactical rather than strategic operational thinking
- May not invest in learning that supports long-term vision development

**Implications for the Chief Operations Officer Role****Exceptional Strengths for Healthcare Operations Leadership**

**Crisis Management and Operational Resilience:** Leadership Candidate's high emotional stability combined with exceptional ambition creates ideal capabilities for managing healthcare operational crises. She can maintain clear thinking while driving decisive action during emergencies, staffing challenges, or regulatory issues.

**Results-Driven Operational Excellence:** Her very high ambition and practical focus ensure she will drive operational performance and continuous improvement. She can make tough decisions based on logical analysis and push for operational excellence without being deterred by resistance.

**Independent Decision-Making Authority:** The combination of high adjustment and very low sociability positions her well for making difficult operational decisions without being swayed by social pressure or politics, essential for healthcare operations requiring unpopular but necessary choices.

**Systematic Execution and Accountability:** Her moderate prudence combined with practical learning approach ensures she will maintain appropriate operational standards while adapting to changing healthcare requirements and regulatory demands.

**Critical Development Opportunities and Strategic Considerations**

**Interpersonal Relationship Management:** Leadership Candidate's very low interpersonal sensitivity presents significant challenges for building and maintaining the collaborative relationships essential for healthcare operations success. She will need intensive development in:

- Building rapport with clinical staff, physicians, and department heads
- Communicating operational changes in ways that maintain stakeholder engagement
- Developing emotional intelligence for managing diverse healthcare personalities
- Creating collaborative operational culture despite natural preference for independence

**Stakeholder Engagement and Influence Building:** Her very low sociability may severely limit her ability to build the organizational networks and influence necessary for senior executive effectiveness:

- Developing relationships with board members, community leaders, and external partners
- Building internal networks across departments and service lines
- Engaging in industry relationships that support organizational strategic objectives
- Creating visibility and influence beyond direct operational responsibilities

**Strategic Innovation and Change Leadership:** Very low inquisitive score presents barriers to leading strategic transformation and innovation initiatives:

- Developing openness to new operational technologies and methodologies
- Leading organizational change initiatives that require innovative approaches
- Anticipating future healthcare trends and competitive challenges
- Championing operational improvements that challenge established practices

**Communication and Team Development:** Her direct communication style may limit effectiveness in developing and empowering operational teams:

- Learning to communicate operational requirements in ways that motivate rather than alienate
- Developing coaching and mentoring capabilities for operational staff development
- Building team engagement and commitment to operational excellence initiatives
- Balancing directness with emotional intelligence in performance management

### **CEO Consideration Statement**

Leadership Candidate 's Hogan Potential profile demonstrates exceptional operational leadership capabilities grounded in emotional stability, achievement drive, and practical execution focus. Her ability to maintain composure during crises while driving results through logical decision-making positions her well for the demanding operational challenges facing healthcare organizations.

However, her very low interpersonal sensitivity and sociability scores represent critical risks that must be addressed through intensive development and organizational support systems. Her success in the Chief Operations Officer role would depend heavily on substantial investment in relationship management coaching, structured stakeholder engagement support, and complementary leadership team members who can offset her interpersonal limitations.

This represents a high-potential operational leader with exceptional crisis management and results-driven capabilities, but with significant interpersonal development needs that could either be transformed into executive effectiveness through targeted support or become limiting factors for senior leadership success. Her greatest value lies in operational stability, logical decision-making, and driving systematic improvements, with clear pathways for development in collaborative leadership and stakeholder relationship management.

## **Leadership Candidate - Hogan Challenge Detail Report Summary**

### **Chief Operations Officer Candidate**

#### **Overview**

The Hogan Challenge Report outlines potential derailers—personality-based risks that may emerge when a leader is under stress, pressure, or fatigue. These behaviors can impact relationships, decision-making, and overall leadership effectiveness if not managed consciously. Leadership Candidate's profile reveals a leader with significant derailment risks in interpersonal relationships and passive resistance that could substantially impact her effectiveness in senior leadership roles, particularly in healthcare environments requiring extensive stakeholder collaboration.

#### **Key Derailment Risks and Implications**

##### **1. Reserved - High Risk (96%)**

Leadership Candidate shows an extremely strong tendency toward social withdrawal and emotional distance, particularly under pressure. This represents her most significant leadership risk.

##### **Implications:**

- May appear unconcerned with others' feelings and seem tough, blunt, or insensitive
- Risk of significant relationship damage with physicians, clinical staff, and essential healthcare stakeholders
- Could seem uncommunicative and withdraw during high-pressure operational situations
- May alienate staff and fail to motivate teams through lack of interpersonal awareness
- Staff may be unclear about expectations and direction due to poor communication

##### **Development Focus:**

- Enhancing daily visibility and proactive communication with operational staff
- Developing awareness of social cues and emotional impact on healthcare stakeholders
- Building structured approaches to relationship maintenance across departments
- Creating formal communication protocols to ensure consistent stakeholder engagement

##### **2. Leisurely - Moderate Risk (88%)**

Leadership Candidate demonstrates tendencies toward passive resistance and procrastination when feeling criticized or disrespected, which could undermine operational initiatives.

##### **Implications:**

- May not follow through on commitments when feeling undervalued or criticized
- Risk of quiet stubbornness and dragging feet on projects she doesn't personally support
- Could blame others for inability to meet deadlines when under stress and pressure



- May provide inconsistent support for organizational initiatives depending on personal relevance
- Tendency to procrastinate on tasks she finds disagreeable or challenging

**Development Focus:**

- Building awareness of passive resistance patterns and their impact on operations
- Developing commitment to organizational objectives regardless of personal preferences
- Creating accountability systems for consistent follow-through on operational commitments
- Learning to communicate disagreements constructively rather than through passive resistance

**3. Skeptical - Moderate Risk (72%)**

Leadership Candidate shows moderate tendency toward cynicism and argumentative behavior, particularly when receiving criticism or evaluating new ideas.

**Implications:**

- May seem overly critical and resistant to new operational approaches or innovations
- Risk of taking criticism personally and holding grudges against those who challenge her
- Could create cynical climate and appear argumentative in leadership meetings
- May focus more on identifying problems than finding alternative solutions
- Tendency to distrust coaching and development efforts, making her difficult to coach

**Development Focus:**

- Learning to separate personal reactions from professional feedback and criticism
- Developing openness to new ideas and innovative operational approaches
- Building skills in constructive evaluation rather than purely critical assessment
- Creating structured approaches to receiving and processing feedback effectively

**Low or No-Risk Traits (Strengths Under Pressure)**

Leadership Candidate demonstrates exceptional resilience across several challenge areas, indicating minimal derailment risk:

**Excitable (50%) - Low Risk:** Calm and steady under pressure without emotional volatility or disappointment cycles.

**Cautious (49%) - Low Risk:** Confident and willing to take appropriate operational risks without excessive worry about criticism.

**Bold (67%) - Low Risk:** Realistic self-assessment and willingness to listen to feedback without overconfidence.

**Mischievous (40%) - Low Risk:** Trustworthy and avoids unnecessary risks while maintaining commitments.

**Colorful (39%) - No Risk:** Modest and focused on work rather than attention-seeking behaviors.

**Imaginative (35%) - No Risk:** Practical and grounded in realistic solutions without eccentric thinking.

**Diligent (32%) - No Risk:** Appropriately relaxed and willing to delegate without perfectionist tendencies.

**Dutiful (12%) - No Risk:** Independent and willing to challenge assumptions without excessive deference to authority.

## Summary of Derailment Insights

Leadership Candidate presents a challenging derailment profile with three significant risk areas that could severely impact her executive effectiveness:

**Interpersonal Relationship Damage** through social withdrawal and insensitive communication that may alienate critical healthcare stakeholders, particularly during stressful operational periods.

**Passive Resistance and Operational Undermining** when feeling criticized or undervalued, potentially sabotaging operational initiatives through procrastination and inconsistent support.

**Cynical and Argumentative Climate Creation** that could resist necessary operational improvements and create hostile work environments for innovation and change.

These risks are particularly concerning for a Chief Operations Officer role that requires extensive relationship building, stakeholder engagement, and leading organizational change initiatives. However, her exceptional stability in most other areas suggests these challenges can be addressed through intensive development and structured support systems.

## Implications for the Chief Operations Officer Role

### Strengths Under Pressure:

- Exceptional emotional stability and composure during operational crises
- Independent decision-making capability without social pressure influence
- Practical, grounded problem-solving approach during high-stress situations
- Reliable, trustworthy behavior with appropriate risk assessment
- Modest, task-focused leadership without drama or attention-seeking behaviors

### Critical Risks and Watchouts:

- May severely damage relationships with physicians, clinical staff, and department heads through insensitive communication
- Risk of creating hostile work environment through lack of interpersonal awareness and social withdrawal
- Could undermine operational initiatives through passive resistance when feeling criticized or undervalued
- May appear cynical and resistant to necessary operational improvements and innovations
- Potential for communication breakdowns during high-pressure operational situations

## **Development Recommendations for COO Success**

### **Immediate Focus Areas:**

#### **Interpersonal Communication and Relationship Management:**

- Establish daily structured communication protocols with key operational stakeholders
- Develop awareness of social cues and emotional impact on healthcare staff
- Create formal relationship maintenance systems across departments and service lines
- Build skills in empathetic communication while maintaining operational directness

#### **Commitment and Follow-Through Systems:**

- Establish clear accountability frameworks for operational commitments regardless of personal preferences
- Develop awareness of passive resistance patterns and their impact on organizational effectiveness
- Create structured approaches to communicating disagreements constructively
- Build systems for consistent support of organizational initiatives

### **Long-Term Development Strategy:**

#### **Executive Presence and Stakeholder Engagement:**

- Intensive coaching in healthcare stakeholder relationship management
- Development of collaborative communication styles for physician and clinical staff engagement
- Building skills in managing up and influencing without authority
- Creating visibility and engagement strategies for board and community relationships

#### **Change Leadership and Innovation Acceptance:**

- Developing openness to operational innovations and new healthcare technologies
- Building skills in leading organizational change initiatives
- Learning to evaluate new ideas constructively rather than critically
- Creating frameworks for embracing rather than resisting necessary operational improvements

### **CEO Consideration Statement**

Leadership Candidate demonstrates strong operational resilience and practical problem-solving capabilities under pressure, with minimal risk in most derailment areas. However, her extremely high Reserved score (96%) combined with moderate Leisurely (88%) and Skeptical (72%) risks represent critical concerns for executive effectiveness in the COO role. Her tendency toward social withdrawal and insensitive communication may damage the collaborative relationships essential for healthcare

operations success, while her passive resistance patterns may undermine operational initiatives when she feels criticized or undervalued.

Success in the Chief Operations Officer role would require intensive coaching support focused on interpersonal relationship management, structured communication protocols, and complementary leadership team members who can offset these specific interpersonal risks. Her derailment profile suggests she could excel in highly structured, results-oriented environments but may struggle significantly with the relationship-intensive, collaborative demands of senior healthcare leadership without substantial development investment and ongoing support systems.

## Leadership Candidate - Hogan Values Detail Report Summary

### Chief Operations Officer Candidate

#### Overview

The Hogan Motives, Values, Preferences Inventory (MVPI) measures the core drivers and motivators that influence a leader's behavior, culture fit, and engagement priorities. These values shape where the leader will naturally invest time, how they relate to others, and the environments in which they will thrive. Leadership Candidate's values profile reflects a leader driven by structure, tradition, and practical results, with minimal emphasis on social interaction or collaborative approaches, creating both significant strengths and challenges for healthcare operations leadership.

#### Top Motivational Drivers and Cultural Anchors

##### 1. Tradition (Very High - 75%)

Leadership Candidate has an extremely strong preference for structure, hierarchy, and established procedures. She deeply values formal organizational frameworks and conventional approaches to problem-solving.

##### Implications for COO Role:

- Exceptional strength in maintaining regulatory compliance and established healthcare protocols
- Will create structured, predictable operational environments with clear authority lines
- Strong alignment with formal healthcare hierarchies and professional standards
- May resist innovative approaches or non-traditional operational methodologies
- Could struggle with collaborative, flat organizational structures or disruptive healthcare innovations

##### 2. Commerce (Moderately High - 61%)

Leadership Candidate shows strong focus on financial success, competitive performance, and business accountability, indicating results-driven operational thinking.

##### Implications for COO Role:

- Appreciates performance-driven healthcare environments with clear accountability measures
- Will focus on operational efficiency and financial performance optimization
- Understands importance of competitive positioning and business sustainability in healthcare
- May rigorously evaluate operational performance and push teams to achieve financial targets
- Balances financial considerations with operational effectiveness and quality standards

##### 3. Hedonism (Moderate - 42%)

Leadership Candidate demonstrates moderate preference for serious, businesslike approaches over casual or informal work environments.

**Implications for COO Role:**

- Will maintain professional, structured operational culture with clear expectations
- Emphasizes proper processes and standardized workflows in healthcare operations
- Values civility and professional behavior across all operational interactions
- May resist informal or spontaneous approaches to operational problem-solving
- Ensures workflow organization and predictability in healthcare service delivery

**Lower Emphasis Values**

These areas reflect minimal motivational drive, significantly influencing Leadership Candidate's leadership approach:

**Affiliation (Extremely Low - 1%)**

Leadership Candidate shows virtually no interest in social networking, team collaboration, or building interpersonal relationships.

**Implications for COO Role:**

- Extremely low need for social interaction may severely limit stakeholder relationship building
- Prefers individual work over collaborative operational approaches
- May assume others prefer to work independently without team-based coordination
- Risk of creating isolated, non-collaborative operational work environment
- Could significantly undervalue team-based healthcare delivery approaches

**Aesthetics (Very Low - 3%)**

Leadership Candidate emphasizes pure functionality over style, innovation, or creative approaches to operational challenges.

**Implications for COO Role:**

- Purely functional focus on operational solutions without emphasis on innovation or creativity
- Practical, solution-focused approach to facilities, technology, and process improvement
- May undervalue patient experience enhancements or workplace environment considerations
- Could miss opportunities for creative solutions to complex operational challenges
- Focuses exclusively on substance over style in all operational decisions

**Security (Low - 23%)**

Leadership Candidate shows minimal need for stability and predictability, preferring risk-taking and entrepreneurial action.

**Implications for COO Role:**

- Willing to take operational risks and experiment with new methods and procedures
- Endorses rapid change and adjustment when operational improvements are needed
- Not worried about honest mistakes and failures in pursuit of operational excellence
- May make quick, intuitive operational decisions without extensive risk analysis
- Believes greatest operational rewards come from taking calculated risks

### **Recognition (Low - 38%) and Power (Low - 38%)**

Leadership Candidate shows minimal desire for visibility, acknowledgment, or control over others.

#### **Implications for COO Role:**

- Will focus on operational effectiveness rather than seeking personal recognition or authority
- May not actively promote operational achievements or seek visibility for successes
- Could limit organizational influence by avoiding high-profile leadership opportunities
- Risk of under-communicating operational improvements to board and community
- Prefers collaborative approaches over authoritative operational leadership

### **Cultural Fit and Executive Implications**

#### **Strengths for Healthcare Operations Leadership:**

- Strong preference for structure, regulatory compliance, and established procedures
- Values traditional healthcare hierarchies and professional protocols
- Moderate business focus balanced with operational effectiveness priorities
- Willing to take calculated risks for operational improvement and innovation
- Will create professional, structured operational environments with clear expectations

#### **Watchouts and Cultural Friction Potential:**

- May significantly under-emphasize team collaboration and stakeholder relationship building
- Could create isolated operational work environment limiting cross-departmental coordination
- May resist creative or innovative solutions to complex operational challenges
- Limited social interaction preference may impact physician and clinical staff relationships
- Could undervalue patient experience and workplace environment considerations

### **Unconscious Biases and Decision-Making Patterns**

**Structure and Authority Preference:** May protect status quo and distrust unconventional operational approaches that challenge established healthcare procedures.

**Individual Work Assumption:** Assumes others prefer to work independently without team-based coordination or collaborative decision-making.

**Functional Focus:** May dismiss creative or innovative solutions in favor of purely practical operational approaches.

**Risk Tolerance:** Willing to make quick, intuitive decisions with minimal risk analysis when operational improvements are needed.

**Professional Standards Emphasis:** Values traditional hierarchies and established practices over collaborative or innovative approaches.

## Leadership Culture Created

As COO, Leadership Candidate will naturally create an organizational culture that:

- Emphasizes formal structures, individual accountability, and clear hierarchical relationships
- Values conformity to established procedures and regulatory compliance
- Focuses on practical operational results and financial performance optimization
- Minimizes team interaction and collaborative decision-making processes
- Prioritizes functional solutions over innovative or creative operational approaches

## CEO Consideration Statement

Leadership Candidate 's Values profile demonstrates strong alignment with healthcare operations requiring structure, regulatory compliance, and systematic execution. Her deep commitment to tradition and established procedures will support consistent operational excellence and regulatory adherence. However, her extremely low affiliation score (1%) combined with minimal emphasis on recognition and social interaction presents significant concerns for stakeholder relationship management and collaborative leadership.

Success in the Chief Operations Officer role would require substantial support systems to address her limitations in team collaboration, stakeholder engagement, and innovative problem-solving approaches. She would thrive in highly structured, traditional healthcare environments but may struggle with the dynamic, collaborative, and relationship-intensive requirements of modern healthcare operations leadership. Her greatest value lies in operational compliance, financial performance, and systematic execution, with critical development needs in collaborative leadership, stakeholder relationship management, and innovative operational thinking for comprehensive COO effectiveness.



## Leadership Candidate - Interview Summary Analysis

### Assessment-Aligned Leadership Evaluation

#### Overview

This structured interview was designed to explore and validate key findings from Leadership Candidate's WHY.os Discovery, Hogan Leadership Forecast Series, and TKI conflict style profile. Her responses offer insight into her leadership perspective, decision-making style, and readiness to lead as Chief Operations Officer (COO) at ACME Health.

#### Key Takeaways from Interview Responses

##### 1. Systematic Improvement and Innovation Leadership

Leadership Candidate described implementing a new provider experience approach that faced significant resistance from providers due to fear. She overcame this by enlisting an early adopter as champion and implementing pilot programs to demonstrate effectiveness.

##### Assessment Alignment:

- Her Better Way WHY clearly evident in challenging "the way things are" and driving improvement
- High Compromising (75%) and moderate Collaborating (41%) shown through pilot approach and stakeholder engagement
- High Ambition (84%) demonstrated through persistence despite resistance
- Moderate Learning Approach (57%) reflected in systematic testing and validation approach

**Opportunity:** Her natural drive for improvement combined with systematic implementation approach positions her well for leading operational transformation initiatives at ACME Health.

##### 2. Multi-Stakeholder Problem-Solving and Workflow Optimization

When addressing lab workflow disruptions, Leadership Candidate outlined the ideal process, identified breakdown points, and created awareness of each stakeholder's role and impact on others, leading to improved compliance and workflow.

##### Assessment Alignment:

- WHY.os Make Sense WHAT demonstrated through systematic problem diagnosis and solution creation
- Simplify HOW evident in breaking down complex workflow into understandable components
- High Compromising skills shown in balancing competing priorities through logical analysis
- Very low Interpersonal Sensitivity (4%) balanced by practical problem-solving that created stakeholder buy-in

**Opportunity:** Her ability to make complex operational problems understandable while finding practical solutions aligns perfectly with healthcare operations challenges requiring systematic improvement.

### 3. Team Engagement and Motivational Leadership

Leadership Candidate described using historical context to build team confidence, maintaining practical focus, serving as a cheerleader, and stepping in to help lighten team burdens during challenging times.

#### Assessment Alignment:

- High Adjustment (74%) evident in maintaining positive, supportive approach during difficulties
- Moderate Accommodating (62%) shown through willingness to step in and help team members
- Low Affiliation values (1%) contrasts with her described team support, suggesting intentional effort to overcome natural tendencies
- High Ambition (84%) balanced with team support demonstrates results-driven leadership with people focus

**Opportunity:** Her practical approach to motivation combined with willingness to provide direct support demonstrates operational leadership that can maintain team engagement during challenging periods.

### 4. Complex Conflict Resolution and Stakeholder Management

Leadership Candidate managed a conflict over facility air handling system replacement affecting expensive lab equipment by pulling together key stakeholders, listening to concerns, and facilitating collaborative solution development.

#### Assessment Alignment:

- High Compromising (75%) and moderate Collaborating (41%) clearly demonstrated through stakeholder facilitation
- High Adjustment (74%) shown in maintaining calm during high-stakes, emotional situation
- Moderate Skeptical risk (72%) managed effectively by focusing on practical problem-solving rather than political concerns
- Low Avoiding (22%) confirmed through direct engagement with difficult conflict

**Opportunity:** Her systematic approach to conflict resolution through stakeholder engagement and practical problem-solving demonstrates capability for managing complex healthcare operational conflicts.

### 5. Innovation Implementation and Risk Management

Leadership Candidate implemented a new holiday scheduling approach with staggered start times, taking calculated risk that resulted in staff appreciation and organization-wide adoption consideration.

**Assessment Alignment:**

- Better Way WHY driving innovation in established processes
- Low Security values (23%) enabling risk-taking and experimentation with new approaches
- High Ambition (84%) pushing for implementation despite uncertainty
- Moderate Prudence (36%) allowing flexibility while maintaining operational standards

**Opportunity:** Her willingness to take calculated risks for operational improvement while maintaining systematic approach demonstrates innovation capability essential for healthcare operations leadership.

**6. Crisis Management and External Partnership Development**

When X-ray equipment failed unexpectedly, Leadership Candidate managed patient flow to competitors, coordinated billing arrangements, planned equipment replacement and facility remodeling, while managing stakeholder emotions throughout extended timeline.

**Assessment Alignment:**

- High Adjustment (74%) maintaining composure during operational crisis with revenue impact
- High Compromising skills managing complex multi-party arrangements with competitors
- Practical problem-solving approach aligning with low Inquisitive (12%) focus on immediate, concrete solutions
- High Ambition driving persistence through extended, complex resolution process

**Opportunity:** Her crisis management capabilities demonstrate ability to handle unpredictable healthcare operational challenges while maintaining stakeholder relationships and service continuity.

**7. Integration Strategy and Relationship Building**

Leadership Candidate's 90-day plan emphasizes listening, understanding organizational strengths and opportunities, assessing operating teams, conducting one-on-ones with direct reports, and clarifying her supportive role rather than replacement role.

**Assessment Alignment:**

- High Reserved risk (96%) contrasts with described listening approach, suggesting intentional development of relationship-building skills
- Moderate Learning Approach (57%) evident in systematic assessment and understanding approach
- High Tradition values (75%) shown in respect for existing organizational structure and relationships
- Low Recognition values (38%) demonstrated in emphasizing support role rather than personal positioning

**Opportunity:** Her systematic approach to integration combined with emphasis on support and relationship building suggests awareness of her natural interpersonal challenges and intentional strategies to address them.

## **Overall Interview-Based Themes**

### **Strengths Demonstrated in Interview:**

- Exceptional systematic problem-solving and operational improvement capabilities
- Strong crisis management and multi-stakeholder coordination skills
- Practical innovation approach with calculated risk-taking for operational enhancement
- Persistent leadership through complex, extended problem resolution processes
- Awareness of interpersonal challenges with intentional strategies for relationship building
- Transparent communication style that builds trust and understanding

### **Watchouts and Leadership Growth Areas:**

- May be "transparent to a fault" which could create challenges in sensitive organizational situations
- Gets bored with maintenance mode operations, preferring project and innovation work
- Risk of over-focusing on improvement opportunities without adequate attention to operational stability
- May need support managing the pace of innovation to avoid overwhelming stakeholders
- Could benefit from structured approaches to delegation and team empowerment

### **Next Steps**

This interview confirms that Leadership Candidate is an operationally excellent, innovation-driven leader with exceptional systematic thinking and crisis management capabilities. For the Chief Operations Officer role, her success will depend on:

- Balancing innovation drive with operational stability requirements
- Managing transparency appropriately for sensitive organizational situations
- Developing sustainable engagement with routine operational maintenance alongside improvement projects
- Continuing to build on her intentional relationship-building strategies
- Creating structured frameworks for stakeholder engagement and change management

### **CEO Consideration**

Leadership Candidate demonstrates exceptional operational leadership with strong systematic thinking, crisis management capabilities, and innovation drive. Her practical approach to problem-solving and persistent leadership through complex challenges are significant assets, while her awareness of interpersonal development needs and intentional strategies to address them suggest strong potential for executive growth. Her combination of operational excellence and systematic

improvement capabilities positions her well for the demanding and dynamic requirements of healthcare operations leadership, with clear pathways for continued development in stakeholder relationship management and strategic communication.

## ***A Final Word from the Coach...***

Having spent time reviewing Leadership Candidate's assessment data, behavioral indicators, WHY.os profile, and interview responses, I've had the opportunity to observe a leader with exceptional operational capabilities, remarkable systematic thinking, and a genuine drive to make healthcare operations both better and more understandable. She brings with her an unwavering commitment to logical innovation, the rare ability to simplify complex operational challenges, and the kind of results-driven leadership that healthcare organizations desperately need to navigate today's demanding operational environment.

Leadership Candidate's greatest strength lies in her natural ability to see better ways of doing things while making those improvements simple enough for others to understand and implement. Her Better Way + Simplify + Make Sense combination creates a powerful force for operational transformation that could revolutionize how ACME Health approaches systematic improvement and operational excellence. Her proven track record of successful crisis management, stakeholder coordination, and sustainable process improvements validates her exceptional operational capabilities.

However, Leadership Candidate's comprehensive Hogan assessment reveals fundamental interpersonal and collaborative leadership limitations that represent potential critical barriers to healthcare operations success. Her profile shows potential deficits in relationship building (4th percentile Interpersonal Sensitivity), team engagement (10th percentile Sociability), and collaborative values (1st percentile Affiliation) that conflict directly with healthcare's service-oriented, stakeholder-intensive environment. These limitations, combined with high-risk derailers in communication (96th percentile Reserved) and passive resistance (88th percentile Leisurely), may create substantial concerns about her ability to build the collaborative relationships essential for healthcare operations leadership.

The transition from systematic problem-solver to relationship-building executive leader—from being the person who finds the logical solution to inspiring others to embrace and implement those solutions—represents not just a developmental challenge but potentially indicate a fundamental mismatch with her core personality characteristics. Leadership Candidate's extremely low concern for others' feelings, minimal interest in social contact, and tendency to appear tough and intimidating in communications could work directly against the collaborative, service-oriented culture that healthcare organizations require.

While Leadership Candidate's exceptional operational capabilities and crisis management expertise provide significant value, the interpersonal development required would involve fundamental changes to core personality characteristics around empathy, collaboration, and service orientation that may not be practical or achievable within reasonable timeframes for executive responsibilities. Her very low altruistic values conflict with healthcare's patient-centered mission, and her communication risks may damage critical stakeholder relationships with physicians, clinical staff, and external partners essential for operational success.

The combination of her exceptional drive for improvement and her severe interpersonal limitations creates a high-risk profile where the potential for relationship damage and cultural disruption outweighs the operational benefits. Healthcare operations leadership requires extensive stakeholder collaboration, team engagement, and service-oriented culture development—areas where Leadership Candidate's natural tendencies may work directly against success requirements.

Leadership Candidate's greatest value to ACME Health may lie in leveraging her exceptional systematic thinking, operational discipline, and crisis management capabilities in senior operational management roles with reduced interpersonal demands—such as process improvement, analytics, or project management positions—where her task-focused approach becomes advantageous rather than limiting. This would allow the organization to benefit from her remarkable operational excellence while avoiding the significant risks inherent in placing her in roles requiring extensive collaborative leadership and stakeholder relationship management.

This summary is offered not as a recommendation, but as a reflection of the data and interactions, and in support of thoughtful, informed decision-making for the CEO.

**Darren Walker**

Executive Coach