



Leading With Vision:

Building Strategy-Driven Cultures that Deliver

Participant & Resource Guide

June 2025

Opening Activity, Think Of...

Your worst leader/boss ever

Your best leader/boss ever

Today's Agenda

- Review the recent state of employment
- Identify the recipe for organization design
- Explore the five ingredients of highly effective organizations/teams
- Examine the full-range of leadership
- Examine the five core competencies of emotional intelligence
- Explore the strategic planning process

11.5 million

41%

6 months

36%

64%

- **Causes Of These Trends**
- Being undervalued and unheard by a toxic, narcissistic _____
- Not feeling _____ by the organization
- Didn't _____ a sense of belonging at work
- Getting _____ out

Recipe Of Highly Effective Organizations

- Share a common _____
 - This is your Vision and Mission
- Have a common focus
 - This is your _____ Plan
- Each person understands how they _____
 - This is each person's performance scorecard
- Diversity of _____
 - This is each person's talent profile
- Norms of behavior
 - These are your _____ values

Your Organization's Super-Ordinate Goals

VISION – WHERE WE ARE _____

MISSION – _____ WE DO AND _____ WE DO IT NOW

Dimension	Vision Statement	Mission Statement
Purpose	Describes the future the organization aspires to create	Explains the organization's core purpose and current role
Time Orientation	Future-focused (aspirational; "where we're going")	Present-focused (practical; "what we do today")
Scope	Broad and inspirational	Specific and actionable
Audience	Inspires internal and external stakeholders	Informs internal teams and guides daily operations
Tone	Motivational, ambitious, often idealistic	Practical, grounded, and direct
Example (Tesla)	<i>"To create the most compelling car company of the 21st century by driving the world's transition to electric vehicles."</i>	<i>"To accelerate the world's transition to sustainable energy."</i>
Example (Patagonia)	<i>"We're in business to save our home planet."</i>	<i>"Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis."</i>

Core Values are the beliefs and behaviors that define what it means to be a good organizational citizen.

Old Versus New Approach to Organization Design

Traditional process

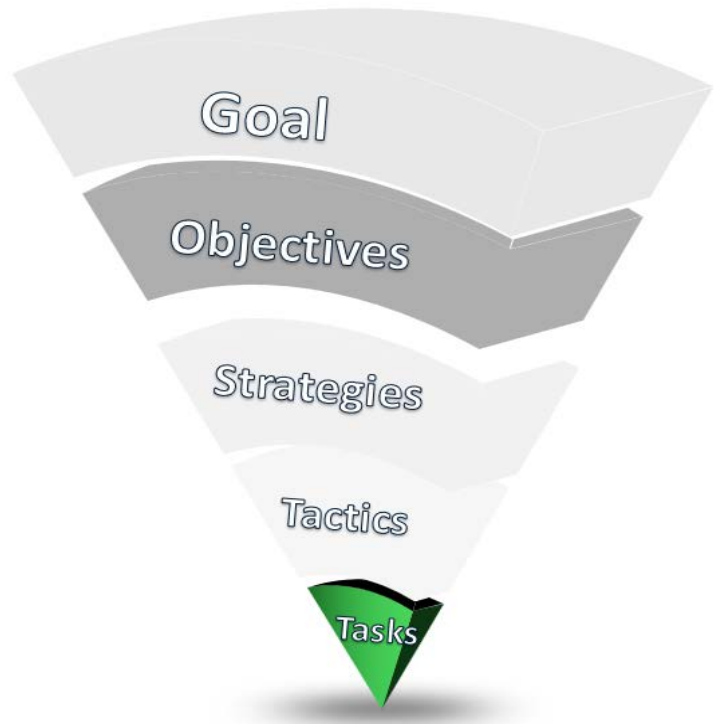
1. People
2. Compensation
3. Structure
4. Strategy

Best practice process

1. _____
2. _____
3. _____
4. _____

Why Strategic Planning Is Important

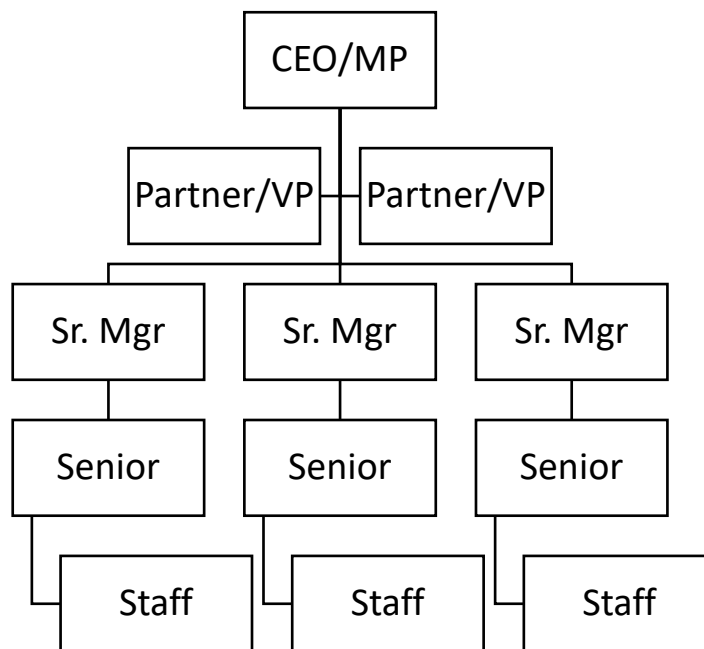
- Provides direction
- Connects everyone to the Vision, Mission and action plan
- Clarifies expectations
- Enhances communication
- Influences teamwork & collaboration
- Creates a cadence of accountability



A Framework To Strategically Plan

- Validate/update/create your Vision, Mission, and Core Values
 - Human capital/talent management
 - Marketing
 - Technology
- Choose your time-period
 - 3 – 5 years
- Create SMART goals for each domain
- Conduct a context analysis
 - SWOT
 - Porter's Five Forces Analysis
 - PESTLE
- Create the organizational structure to execute on the plan
- Put the right people in the right positions
- Identify what success looks like in five years
 - Financially
 - Operationally
- Create a cadence of accountability

Create The Structure (An Organizational Chart) Needed To Execute On The Strategy



Fill the Organizational Structure With The Right People

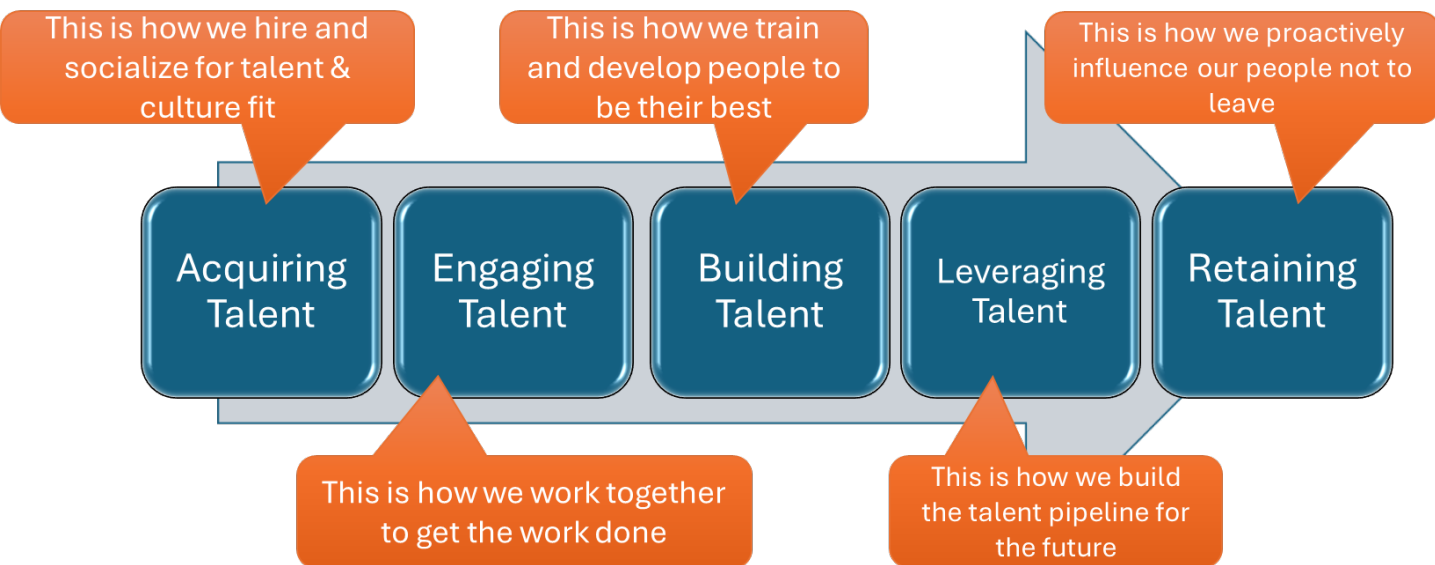
- Use a VALIDATED talent/personality assessment that:
 - Is trait-based
 - Normatively scored
 - Psychometrically valid
 - Has a job modeling component

Create a Total Rewards Program That Incentivizes Individuals To Achieve Their Goals

- The overall goal of a robust Total Rewards Program is to provide comprehensive and competitive compensation, benefits and awards to attract, reward, retain talented and motivated Associates who will help achieve the organization's mission and strategy
- Program elements include base pay, incentive pay, profit sharing, and a variety of benefits

Execution Of Strategy

- Create an Employee Value Proposition
 - It is the experience offered by an employer for the hard work and dedication of an employee
 - A well-crafted EVP articulates your organization's unique culture and work experience
- Create a Talent Management Plan
 - This helps hire and retain the right human capital to get your strategy done



Accountability Of Strategy

1x year – Annual strategy planning session (January)

- 2 days
- Review 3/5 year plans
- Build the next year plan

1x/quarter or trimester – meet for 1 day (March, June, September)

- Progress report for the past quarter/trimester
- Identify goals for the next quarter/trimester

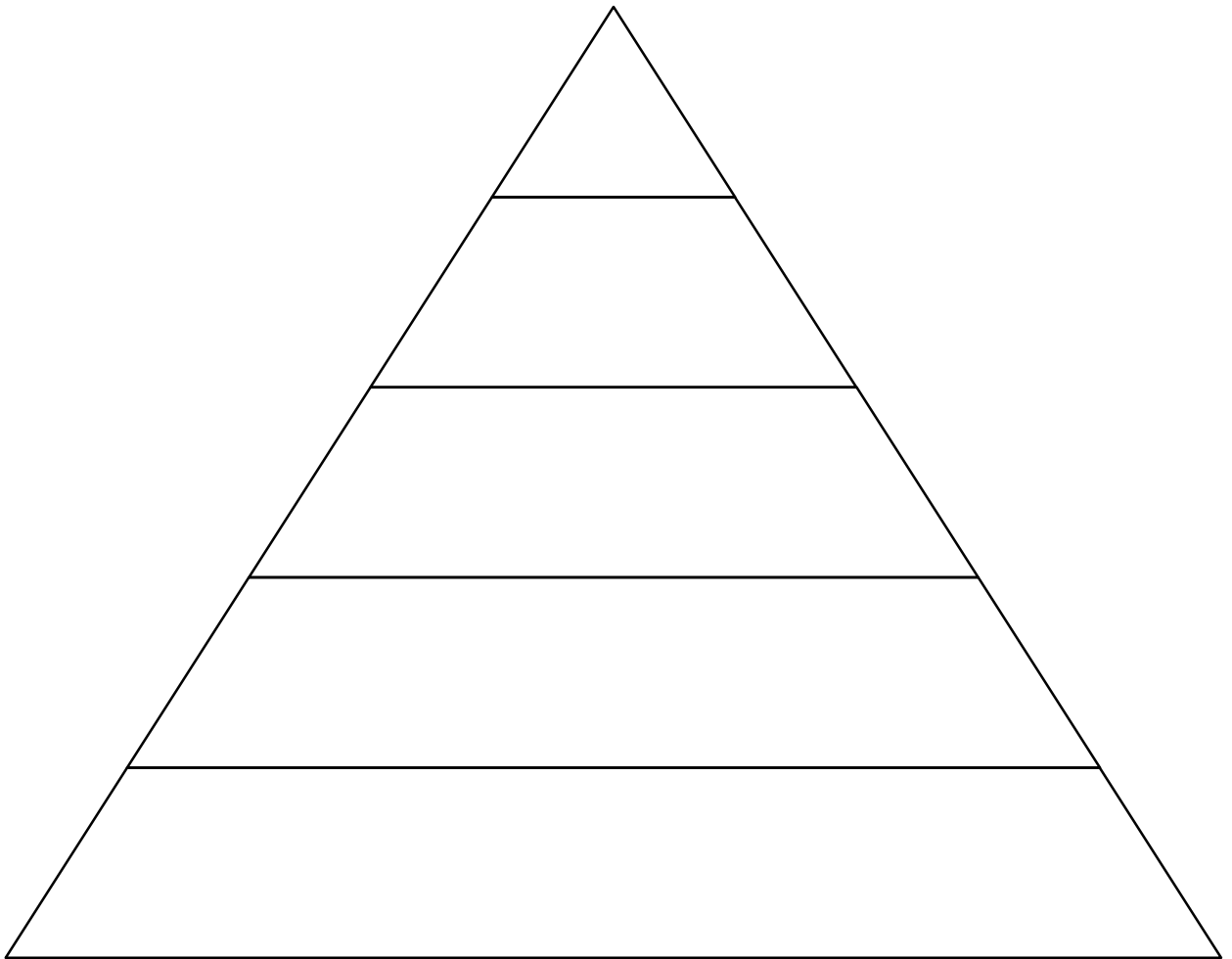
- Discuss key issues/challenges/opportunities

1x weekly – team/department meetings (Tuesday mornings)

- Numbers/KPIs and goals on track
- Employee & client satisfaction
- Resolve key issues/challenges/opportunities

Emotional Intelligence

- Your _____ understanding of who you are and who you are not
 - Understanding your _____ and weaknesses as well, and
 - How these impact others
- Your ability to _____ your strengths and weaknesses in a way that is deemed as appropriate by your organization
- Your ability to _____ understand the emotions and talents in those you interact with
- Your ability to use your self-knowledge and control, as well as the _____ understanding of your colleague to have a healthy interaction
 - Which, hopefully, leads to a healthy relationship



Leaders with HIGH emotional intelligence are better at the following:

- | | |
|-----------------------------|---|
| 1. Participative management | 6. Building & maintaining relationships |
| 2. Putting people at ease | 7. Doing whatever it takes |
| 3. Self-awareness | 8. Decisiveness |
| 4. Work-Life-Balance | 9. Confronting problem employees |
| 5. Straightforward | 10. Change management |
-

Leaders with LOW emotional intelligence are more likely to fall victim to the following career derailers:

- Unaware of “hot buttons”
- Lack of composure/impulse control
- Insensitive to others
- Problems with interpersonal relationships
- Difficulty changing or adapting

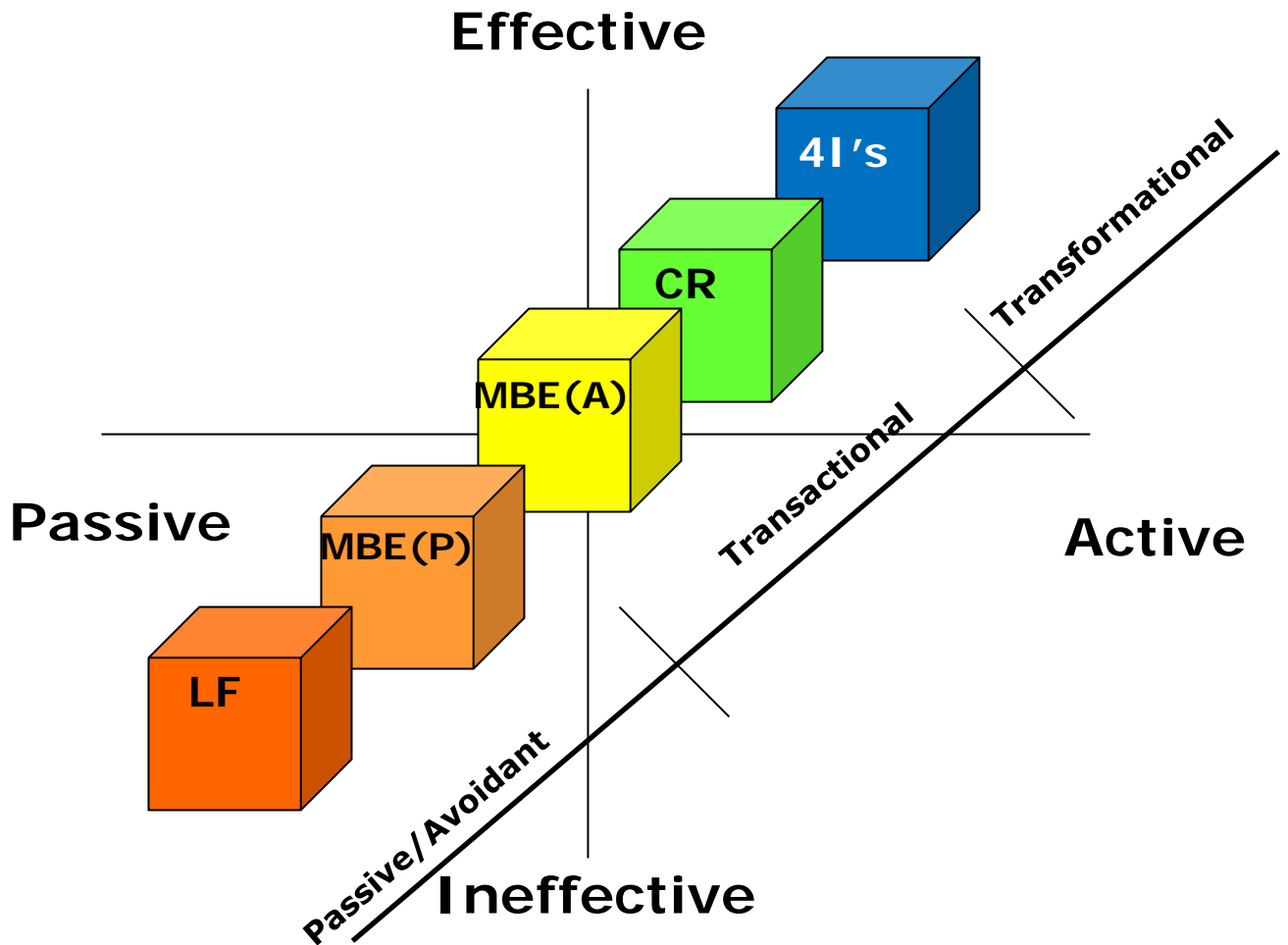
Digging deeper on the "problems with interpersonal relationships."

Specific behaviors that drive this problematic area are:

- Insensitive
 - Manipulative
 - Critical
 - Demanding
 - Authoritarian
 - Self-isolating
 - Aloof
-

Building Your Emotional Intelligence

- Emotional Intelligence **can be** developed and enhanced
 - Fact: it takes a lot of effort and persistence to build
- To effectively build your EQ you **must use** a validated assessment
- To help influence long-term behavioral change you need to set development goals
- The best way to build your EQ is to find ways to use it in the workplace



The Four I's of Transformational Leadership:

Inspirational Motivation: creating an environment where someone can motivate themselves

Intellectual Stimulation: respectfully challenging yourself and solving for your own problems

Idealized Influence: leading by 'good' example and through your authentic self

Individualized Consideration: practicing the platinum rule with others and having meaningful 1:1 relationships with your most important stakeholders

The Impact of Transformational Leadership

Transformational leadership influences followers to do the following:

- Put forth extra effort
- Have more satisfaction with leadership
- Be more effective
 - Productive
 - Increased morale
 - Lower turnover
 - Lower absenteeism
 - More adaptable

When using a transformational leadership style, your followers will feel more:

1. Trust
2. Admiration
3. Loyalty
4. Respect

As a leader, identify three ways that you can strive to be a transformational leader.

1.

2.

3.

ABOUT JEREMY WORTMAN, Ph.D.

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Jeremy is a consultant, speaker and trainer with HRD Initiatives, a consulting firm to the CPA Profession, and other industries, since 2004.

Jeremy's expertise is within talent management and organizational development where he helps firms build and execute strategic plans regarding the people side of their business.

Prior to his work with the Accounting Profession, Jeremy worked at TD Ameritrade for 8 years as their Director of Organizational Development and Effectiveness and Business Psychologist.

His consulting expertise and services include key offerings such as:

- Talent management strategy planning
- Behavioral/talent/personality assessments
- Team building
- 360 Assessments
- Creating competency models
- Creating and facilitating leadership development programs
- Helping firms update their Mission statement
- Helping firms update, or identify, their core values
- Executive coaching
- Employee engagement surveys
- Identifying career paths for their employees
- Enhancing, or building, performance management/feedback systems
- Conflict management and resolution
- Reward and recognition strategies and programs
- Executive and employee on-boarding programs

He is a member of the American Psychological Association, the Society for Industrial and Organizational Psychology, and taught at the University of Nebraska from 1999 to 2016 as an adjunct professor.