December Leadership Meeting

Tuesday, December 8th, 2015

Transforming Parks 2015 and Beyond
Poll Everywhere – Open Poll

What questions do you have so far?

Text 294188 and your message to 22333
<table>
<thead>
<tr>
<th>Time</th>
<th>Topic/ Objective(s)</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>0800 - 0810</td>
<td>Success Vignette – Mt. Tam Collaborative Management Practices</td>
<td>Danita Rodriguez</td>
</tr>
<tr>
<td>0810 - 0840</td>
<td>Transformation Intro and Update</td>
<td>Lisa Mangat, Steve Szalay, Gloria Sandoval</td>
</tr>
<tr>
<td>0840 - 0850</td>
<td>Success Vignette - Bolsa Chica Concession Agreement</td>
<td>Todd Lewis</td>
</tr>
<tr>
<td>0850 - 0905</td>
<td>Break</td>
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<tr>
<td>0905 - 1020</td>
<td>Transformation Workshops: SBB, Ops/HR, Partnerships/ Relevancy, Nat./Cult. Resources</td>
<td>Transformation Committee Co-Chairs</td>
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<tr>
<td>1020 - 1030</td>
<td>Transition</td>
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<tr>
<td>1030 - 1145</td>
<td>Transformation Workshops: SBB, Ops/HR, Partnerships/ Relevancy, Nat./Cult. Resources</td>
<td>Transformation Committee Co-Chairs</td>
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<tr>
<td>1145 - 1300</td>
<td>Lunch</td>
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<tr>
<td>1300 - 1415</td>
<td>Transformation Workshops: SBB, Ops/HR, Partnerships/ Relevancy, Nat./Cult. Resources</td>
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<td>1415 - 1425</td>
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<tr>
<td>1425 - 1540</td>
<td>Transformation Workshops: SBB, Ops/HR, Partnerships/ Relevancy, Nat./Cult. Resources</td>
<td>Transformation Committee Co-Chairs</td>
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<tr>
<td>1540 - 1555</td>
<td>Break</td>
<td>Brian Ketterer</td>
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<tr>
<td>1555 - 1625</td>
<td>Revenue Enhancement Implementation</td>
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</tr>
<tr>
<td>1625 - 1725</td>
<td>Business Chemistry</td>
<td>Julie Quinn</td>
</tr>
</tbody>
</table>
Success Story: Mt. Tam Collaborative Management Practices
Working Collaboratively At Mt. Tam
District Superintendent Danita Rodriguez
Bay Area District
WATERSHED PARTNERSHIPS
ONE MOUNTAIN – ONE VISION
Agenda

1. Opportunities in Crisis
2. Redwood Creek Watershed Collaborative
3. Tamalpais Lands Collaborative
4. Q&A
THE SOLUTION?
Mt. Tamalpais SP

Samuel P. Taylor SP

Muir Woods National Monument
$2.00

Mt. Tam
Redwood Creek Watershed Projects
-GGNRA/GGNPC/CSP-
REDWOOD CREEK WATERSHED COLLABORATIVE
REDWOOD CREEK WATERSHED PROJECTS

Resource Management

Visitor Experience

Sustainable Trail Corridors

Education & Interpretation
ONE MOUNTAIN
ONE VISION
A PARTNERSHIP APPROACH: EARLY COLLABORATION

Operational collaboration on a variety of:

- Natural resources
- Infrastructure
- Wildfire risk
- Recreation management
- Law enforcement issues
TLC AREA OF FOCUS

Area of focus developed by buffering the 632m contour around Mount Tamalpais’s three peaks to 0.5 miles, 1 mile, 1.5 miles, and then each whole mile from 2 to 10 miles.

Areas of future potential focus

Area of:
More Focus

Less Focus

PACIFIC

OCEAN

RICHARDSON BAY

Baker Beach

Bolinas Lagoon

Corte Madera Creek

Crane Creek

Crane Creek

Concho Creek

Cold Spring Creek

Cayon Creek

Bass Lake

Pelican Lake

Wildcat Lake

Osage Creek

Karl Lake

TLC AREA OF FOCUS

AREA OF FOCUS FOR MOUNT TAMALPAIS LANDS COLLABORATIVE
PARTNERSHIP PLANNING & OUTREACH
MOU PARTNERS
CANDIDATE PROJECTS DEVELOPMENT

Community & Conservation

Waterways & Wetlands

Signature Trail Corridors

Legacy Projects
COMMUNITY & CONSERVATION

- Link people to place
- Protect and restore the mountain’s valuable natural & cultural resources
- Increase efficiencies of scale and add value
- Provide a seamless approach
WATERWAYS & WETLANDS

- Enhance high value and sensitive wetland resources,
- Restore salmonid habitat, creeks, marshes and meadows
SIGNATURE TRAIL CORRIDORS

- Provide a seamless visitor experience
- Revitalize and rejuvenate important trail links
- Have high public affinity
LEGACY PROJECTS

- Have high public visibility and support
- Are emblematic of Collaborative partnership
- Address systemic issue and critical need
PROJECTS & PROGRAMS DEVELOPMENT

Many proposed projects and programs span the entire mountain:

**Community & Conservation**
- Youth Engagement Programs
- Volunteer Stewardship Programs
- Strategic Weed Management
- Science Symposia and Conferences
- Citizen Science and Research
- Research Fellowship Program
- Rare and Endangered Species Monitoring, Research, and Reintroductions

**Waterways & Wetlands**
- Wetland and Watershed-scale Hydrology
- and Geomorphology Surveys
- Watershed-scale Inventories (animals, plants)

**Signature Trail Corridors**
- Improved Trail and Location Maps
- Wayfinding and Interpretive Signage
- Assessment, Plan, and Installation
- Mobile Trailheads
- Community Trailheads Design and Installation

**Legacy Projects**
- Native Plant Nursery
- Forest Health and Resiliency
- Threatened Coastal Prairie Restoration
Transformation Intro and Update
Transformation Team Members

Steve Szalay, Team Leader
Ron Birkhead
Helen Carriker
Jay Chamberlin
Ellen Clark
Michaele DeBoer
Dana Jones
Karl Knapp
Todd Lewis
Steve McCormick
Clay Phillips
Danita Rodriguez
Andy Vasquez
Sean Woods
Jared Zucker
Parks Forward Commission and Transformation Team Four Basic Themes

- Make fundamental change to succeed in the future.

- Work productively with new and existing partners to improve and expand facilities, programs and garner more resources.

- Expand park access for all Californians.

- Garner stable and diversified funding, which is imperative for a vibrant park system.
Transformation Team Purpose and Objective

• Over the next year and a half, the Transformation Team will endeavor to strengthen the California state park system through a series of initiatives supporting strategic goals meant to set the Department on a path to a more viable future.

• Achieving these goals will result in changed policies, procedures, guidelines and organizational structure that support an entrepreneurial, service-oriented, creative and collaborative culture.

Transformation Team Strategic Goals

- Develop Excellent Management Systems
- Maintain High Quality Operations and Public Service
- Create Meaningful Connections and Relevancy to People
- Protect and Enhance Natural and Cultural Resources

Thirty plus initiatives were identified to support these strategic goals.
Active Initiatives

These initiatives have been identified as priority initiatives and are actively being addressed by the Transformation Team.

<table>
<thead>
<tr>
<th>Initiative #</th>
<th>Initiative Description</th>
<th>Strategic Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Service-Based Budgeting Program</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Streamline the Staff Hiring Process</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Establish a Leadership Development Program</td>
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</tr>
<tr>
<td>24</td>
<td>Study the Existing Dept. Org. Structure, Analyze Options &amp; Implement Beneficial Change; Align Position Classifications, Qualifications &amp; Organizational Structure with 2017 Vision</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Enhance &amp; Develop Outreach Services to Underserved Communities</td>
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<tr>
<td>19</td>
<td>Review Roles &amp; Responsibilities of the Statewide Support Organizations; Review &amp; Update Policies &amp; Procedures that Enable Partnerships for Park Operations; Develop Management Structure that Fosters Positive Relationship w/ New &amp; Existing Partners</td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Increase Partnerships with Universities, Native American Tribes, Land Trusts, &amp; Other Stakeholders to Identify Research Needs; &amp; Develop Best Practices to Protect &amp; Preserve Natural &amp; Cultural Resources</td>
<td></td>
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</tbody>
</table>
## Department Projects

These projects were formalized from work that was already being done within different program areas towards transforming State Parks.

<table>
<thead>
<tr>
<th>Project Area</th>
<th>Projects</th>
<th>Strategic Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modernization</td>
<td>R2 S2 Project</td>
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<tr>
<td></td>
<td>Department Intranet Update</td>
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<td></td>
<td>WiFi Implementation</td>
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<tr>
<td></td>
<td>Develop an Existing Park Database</td>
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<tr>
<td>Revenue Generation</td>
<td>New and Enhanced Revenue Generation</td>
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<tr>
<td></td>
<td>Smart Phones Parking (Parking Passport)</td>
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<td></td>
<td>eROC</td>
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<tr>
<td></td>
<td>Automatic Pay Machines</td>
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<tr>
<td>Budget Management</td>
<td>Provide &quot;Real Time&quot; Expenditure Projections to Field</td>
<td></td>
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<tr>
<td>Improvement</td>
<td>Position Control</td>
<td></td>
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<tr>
<td></td>
<td>Develop an Annual Maintenance Program</td>
<td></td>
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<tr>
<td>Partnerships</td>
<td>Willow Creek Partnership</td>
<td></td>
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<tr>
<td></td>
<td>Google Trekker</td>
<td></td>
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</tbody>
</table>
Department Projects (Cont.)

These projects were formalized from work that was already being done within different program areas towards transforming State Parks.

<table>
<thead>
<tr>
<th>Project Area</th>
<th>Projects</th>
<th>Strategic Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relevancy</td>
<td>Develop Alternative Minimal Amenity Overnight Lodging</td>
<td></td>
</tr>
<tr>
<td>HQ / Field Support Service</td>
<td>Electronic Timesheet</td>
<td></td>
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<td></td>
<td>Automated Sign Ordering</td>
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<td></td>
<td>Electronic Signature</td>
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</tr>
<tr>
<td></td>
<td>TEC Process Streamlining</td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td>Document and Communicate the State Parks Story</td>
<td>📞</td>
</tr>
<tr>
<td></td>
<td>Highlight Transformation Innovative Programs Coming from the Department</td>
<td>📞</td>
</tr>
<tr>
<td>Marketing</td>
<td>Develop a New Marketing System - Process Final Marketing Scope and Seek Outside Consultant RFQ Proposal</td>
<td>📞</td>
</tr>
</tbody>
</table>
## REMAINING INITIATIVES 11/20/15

### BUDGET AND ALLOCATION OF RESOURCES COMMITTEE

<table>
<thead>
<tr>
<th>INIT #</th>
<th>Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>New Budget Management System</td>
</tr>
<tr>
<td>3</td>
<td>Deferred Maintenance Financing</td>
</tr>
</tbody>
</table>

### OPERATIONS AND HUMAN RESOURCES COMMITTEE

<table>
<thead>
<tr>
<th>INIT #</th>
<th>Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Redevelop the Department Training Program</td>
</tr>
<tr>
<td>8</td>
<td>Develop an Existing Park Data Base - partial implemented as project, see active projects</td>
</tr>
<tr>
<td>25</td>
<td>Improve Performance Management</td>
</tr>
<tr>
<td>27</td>
<td>Develop a High Performance Deferred Maintenance Program</td>
</tr>
<tr>
<td>28</td>
<td>Simplify Procurement of Goods and Services</td>
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</tbody>
</table>

### RELEVANCY COMMITTEE

<table>
<thead>
<tr>
<th>INIT #</th>
<th>Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Study Existing Regional Parks Programs that Emphasize Healthy Lifestyles</td>
</tr>
<tr>
<td>13</td>
<td>Consider Expanding the State Parks System in Underserved Areas</td>
</tr>
</tbody>
</table>

### PLANNING AND INNOVATION COMMITTEE

<table>
<thead>
<tr>
<th>INIT #</th>
<th>Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>Develop Policies and Data that would improve the Development Process of New Parks</td>
</tr>
<tr>
<td>17</td>
<td>Streamline, Update, Align Department Policies, Procedures &amp; Guidelines with 2017 Vision</td>
</tr>
<tr>
<td>32</td>
<td>Improve Communications</td>
</tr>
</tbody>
</table>

### PARTNERSHIPS COMMITTEE

<table>
<thead>
<tr>
<th>INIT #</th>
<th>Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>Improve the Quality &amp; Quantity of Volunteers &amp; Docents</td>
</tr>
<tr>
<td>22</td>
<td>Develop a New Non-Profit Public Benefit Organization to Provide Operational, Financial &amp; Strategic Support for Organizations that Manage Parks in CA</td>
</tr>
</tbody>
</table>

### NATURAL AND CULTURAL RESOURCES COMMITTEE

<table>
<thead>
<tr>
<th>INIT #</th>
<th>Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>Evaluate Best Practices &amp; Develop New Strategies to Encourage Adaptive Reuse of Cultural Resources such as Historic Structures</td>
</tr>
</tbody>
</table>
Sharing Our Transformation

- Transformation Tuesdays
- Social Media
- Blog
- Intranet
- Weekly Digest
- Change Agent Network
- We Are Parks Videos
Transformation Tuesday
The Partnership with Google Maps and State Parks: A Sign of Things to Come
December 1, 2015

Connecting California State Parks to younger, more diverse audiences is a cornerstone of the Parks Forward Commission’s report and has become a major goal of the Transformation Team.

One of the first – and most visible – efforts to do so has been the partnership between Parks and California-based Google.

Just over a year ago, State Parks and Google launched their team effort to map 14 popular state parks and trails. Google employed Trekker, its camera platform, to do the mapping.

The backpack has 15 lenses and takes still photos every 2 seconds. The camera rig was tucked into backpacks of two hikers who took still photos; it took them three months to map the first 14 parks.

From the comfort of their home or mobile device, viewers can view these images to virtually travel along parks, trails, and pedestrian routes with a 360-degree view.
Social Media

California State Parks
December 1 at 2:58pm

New Blog: The Partnership with Google Maps and California State Parks: A Sign of Things to Come
https://castateparks.wordpress.com/.../the-partnership-with-.../

Like  Comment  Share

391 people like this.
Park’s Blog
https://castateparks.wordpress.com/
Other Tools...

• Intranet
• Weekly Digest
• Change Agent Network
• We Are Parks Videos
p.s. promote our specialized license plate

www.parksplate.parks.ca.gov
TRANSFORMING
California State Parks

By Implementing Positive Change
Success Story: Bolsa Chica Concession Agreement
December Leadership Meeting
Success Via Partnership - Bolsa Chica Concessions
The bad, the worse, and the good that came of it.

1. Previous Concession Shortfalls
2. Identifying the Need
3. Facility Conditions
4. Process to Move Forward
5. Success through Local Support
6. Q&A
Previous Concession Shortfalls

Revenue summary:


Total rent paid for 5 years of operation - $123,169

Keep In mind this is for 4 concessions buildings in one of the busiest park units in the system
Identifying the Need

Not hard with a track record of poor service to the public, poor financial performance, and ultimately vacant buildings.

Buildings are weathering rapidly with no use, last contract ended 02/2013

Park attendance is 1,753,103 with no services being offered
Our Process

- Was all about partnership!

- Initially we went out for bid and only received 3 responses, 2 of which were qualified, and none of which inspired confidence.

- We did not want to perpetuate a low performing business enterprise at Bolsa Chica, and we wanted our visitors to feel well taken care of, so we looked to the community for support.

- Kevin Pearsall (OCD staff member) has a history in marketing and business, and was interested in assisting. His logical first step was to engage the Chamber of Commerce. His goal was to stimulate local interest and support of business in the park.

- The Chamber of Commerce in any community is focused on finding, building, and developing strong business and positive connections.

- Within two weeks they had arranged a meeting with 25 promising entrepreneurs!
Success through Local Support

- Our connections through the Chamber ultimately resulted in acceptance of 15 proposals to negotiate!

- A careful analysis of all bidders was conducted, and ultimately we chose Sea Salt LLC as the successful bidder for all 4 locations.

- This result was a surprise to us, we thought that having 4 separate business partners would help drive public interest, but Sea Salt came in at such a high level with a plan based on partnership and a serious capital investment and marketing, we couldn’t say no!

- From Day one owner Alicia Whitney couldn’t stop talking about new opportunities, supporting Parks, enhanced special events, etc.

- We’re finalizing contracts now, but we expect minimum rent to be $140,000 or 10% of gross annually - that’s over 5 times more than our last concessionaires best year! We believe it likely that 10% of gross could quickly outstrip the $140K minimum.
Our new partner is investing $200K into the facilities to address deferred maintenance and usability issues.

Contract will involve a very unique parking validation system

4 uniquely themed facilities will drive interest and satisfy different preferences

- Kanantik Pacific Kitchen, seafood cuisine and specialty coffee
- Beach Cities Provisions, burgers and brew
- Sea Salt grill, grilled food with specialty salts and gourmet shakes
- Sea Legs, Wine Bar and grill
SeaLegs Wine Bar
Bolsa Chica State Beach
KANANTIK
PACIFIC KITCHEN
BOLSA CHICA STATE BEACH
BEACH CITY

Bolsa Chica State Beach
Our new partner is investing $200K into the facilities to address deferred maintenance and usability issues.

Contract will involve a very unique parking validation system

4 uniquely themed facilities will drive interest and satisfy different preferences

- Kanantik Pacific Kitchen, seafood cuisine and specialty coffee
- Beach Cities Provisions, burgers and brew
- Sea Salt grill, grilled food with specialty salts and gourmet shakes
- Sea Legs, Wine Bar and grill

Chamber is issuing award to Sea Salt owner Alicia Whitney as HB entrepreneur of the year

Chamber is issuing award to Kevin Pearsall for HB Chamber of Commerce Proud Partner Award in Jan.

She wants to play with us, not against us, which is a great way to establish a business relationship and a much better model for provision of the best available services for our visiting public.
Transformation Workshop Locations and Schedule

After the break please report to your assigned workshop breakout. Please refer to your name tag for your breakout assignment. The location and schedule for each workshop is provided below.

<table>
<thead>
<tr>
<th>ROOM</th>
<th>WORKSHOP PRESENTATION</th>
<th>TUESDAY (9:05-10:20)</th>
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</thead>
<tbody>
<tr>
<td>NAUTILUS</td>
<td>SBB</td>
<td>2</td>
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<tr>
<td>MOTT-MADRONE</td>
<td>OPS/HR</td>
<td>3</td>
</tr>
<tr>
<td>MOTT-WHITEHEAD</td>
<td>PARTNERSHIPS/RELEVANCY</td>
<td>4</td>
</tr>
<tr>
<td>FRED FARR</td>
<td>NATURAL/CULTURAL</td>
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<table>
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<tr>
<th>ROOM</th>
<th>WORKSHOP PRESENTATION</th>
<th>TUESDAY (10:30-11:45)</th>
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<tr>
<td>NAUTILUS</td>
<td>SBB</td>
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<tr>
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<td>MOTT-WHITEHEAD</td>
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<td>3</td>
</tr>
<tr>
<td>FRED FARR</td>
<td>NATURAL/CULTURAL</td>
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<table>
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<tr>
<th>ROOM</th>
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<th>TUESDAY (13:00-14:15)</th>
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<tbody>
<tr>
<td>NAUTILUS</td>
<td>SBB</td>
<td>3</td>
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<tr>
<td>MOTT-MADRONE</td>
<td>OPS/HR</td>
<td>4</td>
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<tr>
<td>MOTT-WHITEHEAD</td>
<td>PARTNERSHIPS/RELEVANCY</td>
<td>1</td>
</tr>
<tr>
<td>FRED FARR</td>
<td>NATURAL/CULTURAL</td>
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<table>
<thead>
<tr>
<th>ROOM</th>
<th>WORKSHOP PRESENTATION</th>
<th>TUESDAY (14:25-15:30)</th>
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<tbody>
<tr>
<td>NAUTILUS</td>
<td>SBB</td>
<td>4</td>
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<tr>
<td>MOTT-MADRONE</td>
<td>OPS/HR</td>
<td>1</td>
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<tr>
<td>MOTT-WHITEHEAD</td>
<td>PARTNERSHIPS/RELEVANCY</td>
<td>2</td>
</tr>
<tr>
<td>FRED FARR</td>
<td>NATURAL/CULTURAL</td>
<td>3</td>
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</tbody>
</table>
Break
Revenue Enhancement
Implementation
What is a successful project?
How do we get there?
Set reasonable expectations

1. Does the project fit the mission?
2. Does the visitor want it?
3. What is your timeline?
4. What barriers do you have to overcome?
5. Who will be part of your team?
Take the next step

Have a sound methodology

1. Make an honest assessment of all project costs
2. Develop a P&L
3. Be realistic in your ROI
4. Fully vet the costs again with a team of experts
Keep going
List the Requirements

1. What is your timeline to get this done?
2. What permits do you need?
3. What services will you require?
4. How will you monitor your project?
5. What are the ongoing costs?
6. How will you overcome adversities?
7. How will you monitor the project once installed?
8. Oh Yeah, What did the public actually want again?
Don’t hurt yourself when you start to run…
Ensure you have the resources and support

1. Have your team together before you begin
2. Enter the project in PID so it can be vetted by others
3. Will you need Service Center support?
4. Do you need local community support?
Home Stretch
Expect worst case

Don’t set your sights on positive expectations. Think about worst case scenarios.
1. Expect goofs, mistakes, and failures
2. Have a plan
3. Have your team made up of experts, believers, and naysayers
Automated Pay Parking Machines with Phone App

- Set reasonable expectations
- Have a sound methodology
- List the requirements
- Ensure you have the resources
- Expect conflict, goofs, and failure and identify the issues
Business Chemistry
Business Chemistry
Using Science to Improve the Art of Relationships
WHY BUSINESS CHEMISTRY?
What is Business Chemistry?

A new business-oriented personality system, co-developed with a team of scientists from the fields of neuroanthropology and genetics

Action, Not Introspection

Unlike other personality systems, Business Chemistry was explicitly designed to measure observable, business-relevant traits.

Better Approach, Better Insight

Business Chemistry is the first personality system to use novel, patent-pending computational techniques that allow a data-driven approach to understanding personality – both in terms of what people ARE as well as what they ARE NOT.

Sophisticated Simplicity

Although Business Chemistry draws on complex algorithms to assess personalities, the resulting system is simple and easy-to-learn, and can be used to create a hunch of even those individuals who may not have taken the test.
Our Focus

UNDERSTAND YOURSELF

UNDERSTAND OTHERS

ADAPT YOUR STYLE
UNDERSTAND YOURSELF
Pioneers are...

- novelty-seeking
- expressive
- brainstormers
- adaptable
- outgoing
- creative
- energetic
- spontaneous
- collaborative
- imaginative
- generous
- big picture thinkers
- large social network
- nonlinear thinkers
- doers, not planners
- spontaneous
- risk-taking
- unstructured
- intuitive
- disinterested in details
- not methodical
...but they can also be

- novelty-seeking
- expressive
- energetic
- spontaneous
- collaborative
- imaginative
- generous
- creative
- brainstormers
- unstructured
- intuitive
- not methodical
- disinterested in details
- realistic
- nonlinear thinkers
- unpredictable
- opportunistic
- spontaneous
- reckless
- risk-taking
- doers, not planners
- big picture thinkers
- creative
- disinterested in details
- unstructured
- intuitive
- not methodical
- disinterested in details
Guardians are...

<table>
<thead>
<tr>
<th>Methodical</th>
<th>Reserved</th>
<th>Realistic</th>
</tr>
</thead>
<tbody>
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</tr>
<tr>
<td>linear thinkers</td>
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<td>disciplined</td>
<td>want tried and true</td>
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<tr>
<td>thorough</td>
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<td></td>
</tr>
<tr>
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</tr>
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<td>logical</td>
<td>loyal</td>
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Guardians are methodical, linear thinkers, and structured. They are reserved, calm, and less expressive. They are realistic, fact-oriented, and not brainstormers. They are detail oriented, meticulous, and thorough. They are controlled, disciplined, and slow speakers. They are risk averse, frugal, and want tried and true. They are planners, deliberate, and logical. They are respectful, hierarchical, and loyal. They are conventional, less exploratory, and low novelty seeking.
...but they can also be

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...but they can also be

| Closed-minded       | Rigid              | Stubborn                   |
| Rigorous            | Persnickety        | Risk Averse                |
| Controlling         | Respectful         | Conventional               |
| Planners            |                    |                            |
Drivers are...

- Direct
- Logical
- Competitive
- Skilled with numbers
- Tough-minded, driven
- Inventive, experimental, focused
- Intellectually creative
- Skeptical, daring, strategic intelligence
- Exacting, intolerant of ambiguity
- Goal oriented, intent on achievement over relationships
- Mechanically / Technologically savvy
- Understand rule-based systems (math, engineering, computers)
...but they can also be

- uncompromising
- impatient
- demanding
- mind blindness
- less empathetic
- aloof
- direct
- competitive
- logical
- goal oriented, intent on achievement over relationships
- tactically minded, fact based
- mechanically / technologically savvy
- understand rule-based systems (math, engineering, computers)
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Integrators are...

- diplomatic
- collaborative
- consensus-oriented
- risk averse
- non-competitive
- optimistic
- helpful
- value relationships
- patient
- introspective
- trusting
- empathic
- creative
- ambiguity-tolerant
- big picture thinker
- verbal
- emotionally expressive
- nonlinear
- big picture thinker
- introspective
- patient
- trusting
- empathic
- creative
- ambiguity-tolerant
- big picture thinker
- verbal
- emotionally expressive
- nonlinear

*Integrators self-report that they are not creative, although others say they are excellent at making connections and drawing non-obvious conclusions, which many think of as creativity.*
...but they can also be

- back stabbing
- hypersensitive
- placating
- scattered
- gullible
- effusive

*Integrators self-report that they are not creative, although others say they are excellent at making connections and drawing non-obvious conclusions, which many think of as creativity.
Role of Introversion and Extroversion

Outward Focus (Extroverts)

TEAMER

DREAMER

Inward Focus (Introverts)

COMMANDER

SCIENTIST
2

UNDERSTAND OTHERS
Look for This

Below are traits that are shared by adjacent types; individuals usually have the least in common with the type opposite them

- Rapid Decisions
- Risk Tolerant
- Takes Charge
- Tolerates Conflict

- Optimistic
- Spontaneous
- Big Picture Thinkers
- Emotionally Expressive

- Skeptical
- A Planner
- Concrete, Detailed
- Emotionally Contained

- Deliberate Decisions
- Risk Averse
- Introspective
- Avoids Conflict
Notice these Words

- Venture
- Adventure/exciting
- Create/innovate
- Energetic
- New
- Fun/free
- Passion
- Active
- Flexible/adaptable
- Variety

- Intelligent/intellectual
- Debate
- Ambition/ambitious
- Challenge/challenging
- Real
- Logical
- Analyze
- Vision

- Stability
- Honesty
- Moral/morals
- Respectable
- Ought/should
- Appropriate
- Loyal
- Trustworthy
- Values
- Organize
- Precise/orderly

- Authentic
- Alliance
- Kind/kindness
- Sensitive
- Read/reader
- Learning/learn
- Compassionate
- Intuition
- Interpret
- Cooperate
- Down the road
Create a Hunch

Use public information or information available through interactions with the individual to create a “hunch”

- We have learned that it is possible to develop an initial hypothesis – a hunch – about an individual by knowing just a few things about them.

- REMEMBER: A hunch is just that – a hunch. It’s a starting point that one can use, but one should always be observant and constantly refining their hunch.
Mark Zuckerberg

Co-Creator and CEO, Facebook

Is known to be a wary and private person. He doesn’t like to speak to the press, and he does so rarely.

“Zuck expects debate…don’t argue just to be heard, without sound logic, or without proposing solutions.” – Andrew Bosworth, Facebook Engineering Director

Takes on a new “personal challenge” every year

He once had a business card that read, “I’m CEO, B***H”
Ellen DeGeneres

Stand-up Comedian, Television Host, Actress

“Follow your passion. Stay true to yourself. Never follow someone else's path unless you're in the woods and you're lost and you see a path. By all means, you should follow that.”

“I personally like being unique. I like being my own person with my own style and my own opinions and my own toothbrush.”

“I don't live in fear, I'm free, I have no secrets.”
Wayne Gretzky

National Hockey League Player and Coach

Dedicated to – and meticulous about – the study of hockey

“It’s all practice. I got it from my dad. Nine out of ten people think it’s instinct, and it isn’t”

Humble and self-deprecating

Deeply loyal to his fans; never denies an autograph

“Modest to a fault, Macintosh-Apple wholesome, dedicated, an inspirational model for young fans”

“And people who know me would tell you that away from hockey I'm really not that competitive. I'm probably completely different than what people really expect out of me when they first meet me.”
Oprah Winfrey

Talk Show Host, Businesswoman

“I am almost completely intuitive. The only time I’ve made a bad business decision is when I didn’t follow my instinct.”

Sees the big picture (‘web thinker’); Verbal & people skills; Emotionally expressive

“Before you agree to do anything that might add stress to your life, ask yourself: What is my truest intention? Give yourself time to let a yes resound within you. When it's right, I guarantee that your entire body will feel it.”
## A Meeting of Minds…

In a meeting of individuals working together for the first time, who is most likely to…

<p>| | |</p>
<table>
<thead>
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<td>Request a detailed agenda or meeting process</td>
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<td>Suggest each person share their opinion</td>
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<td>Take charge of the meeting</td>
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<td>4.</td>
<td>Propose scrapping the agenda and changing direction</td>
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<tr>
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<td>Say the least</td>
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<td>6.</td>
<td>Nod encouragingly to the person speaking</td>
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<td>7.</td>
<td>Vigorously debate their point</td>
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<td>8.</td>
<td>Get out of their chair</td>
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<td>9.</td>
<td>Ask people about their journey into the meeting, their weekend plans, or their favorite flavor of ice cream</td>
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<td>10.</td>
<td>Suggest postponing a decision until more data can be gathered</td>
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<td>11.</td>
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In a meeting of individuals working together for the first time, who is most likely to...

1. Request a detailed agenda or meeting process
2. Suggest each person share their opinion
3. Take charge of the meeting
4. Propose scrapping the agenda and changing direction
5. Say the least
6. Nod encouragingly to the person speaking
7. Vigorously debate their point
8. Get out of their chair
9. Ask people about their journey into the meeting, their weekend plans, or their favorite flavor of ice cream
10. Suggest postponing a decision until more data can be gathered
11. Offer a technical explanation or solution
12. Suggest a brainstorming session
3

ADAPT YOUR STYLE
An ounce of action is worth a ton of theory.

- Ralph Waldo Emerson
Business Chemistry Results of Leadership Meeting Attendees

- Pioneer: 31%
- Driver: 19%
- Guardian: 17%
- Integrator: 33%
### Interacting with Others…

<table>
<thead>
<tr>
<th>To connect with them you should:</th>
<th>Explore ideas; discuss what they do</th>
<th>Get to the point; discuss what they think</th>
<th>Emphasize the “right” thing; discuss what is tried and true</th>
<th>Think long term; discuss how they feel about..</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ideas presented should be:</td>
<td>Exciting</td>
<td>Logical</td>
<td>Rich in details</td>
<td>Warm Humane</td>
</tr>
<tr>
<td></td>
<td>Expansive</td>
<td>Concise</td>
<td>Focus on the ‘best’ way to do things</td>
<td>Imaginative</td>
</tr>
<tr>
<td></td>
<td>Creative</td>
<td>Low key</td>
<td>Concrete</td>
<td>Contextual</td>
</tr>
<tr>
<td></td>
<td>Fewer details</td>
<td>Blunt</td>
<td></td>
<td>Long term</td>
</tr>
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</table>

| Special coaching considerations: | Not reflective                        | Competitive – like to be right         | Pensive and self-critical                              | Focus on the impact to others                 |
|                                  | Impulsive                             | Data and logic oriented                | Practical                                              | Some are easily hurt                          |
|                                  | Quick to react                        | Want ‘the truth’                       | Love data and details                                  |                                               |

| You know you’re in trouble when they: | Tune out or attack your ideas         | Display rank or become dictatorial     | Become withdrawn                                       | Become reluctant or placate                   |

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Strength in Diversity
Questions

If you have any general questions regarding the content of this presentation, please reach out to Megan Crookham at mcrookham@deloitte.com.