STACKING THE DECK:
CAREER STRATEGIES FOR OUTSMARTING THE COMPETITION

BY
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Introduction

In many of these chapters, you’ll detect a recurring theme highlighting applications of influence or persuasion on different career, leadership, and organizational strategies. That’s the essence of persuasion and influence — it’s having the tools at your disposal so you can be heard, get noticed, and get epic results with your message that gets through to decision makers first and fast.

The fundamental beliefs and opinions of people everywhere are kept behind a well-guarded fortress because it keeps out conflicting perspectives through which they see the world. They need a compelling reason offered in a way that touches upon what matters to them before they will lower the drawbridge to consider a different position, opinion, or belief. That’s where influence and persuasion strategies pay off.

Our brains have evolved to take the path of least resistance and other short cuts when assessing our everyday environment. It requires too much processing power to navigate in an increasingly complex world. It takes more cognitive effort to enhance awareness, be present, and reflect more deeply — especially for ideas or suggestions that confront those profound beliefs.

That’s why we are so susceptible to influence and persuasion. And so it is with people in companies or organizations considering your product or services. The act of persuading someone else to buy in to your proposal, sign a large purchase order, offer you a job, or give you what you want first begins with knowing that person and understanding who they are, what they need and sincerely wanting to help. That’s called empathy — a compassionate response to the
feelings of others. Empathy is an important quality of leadership presence. Empathy helps pave the way for your influence and persuasion to work their magic to have others change their behavior, approve a proposal, or agree to hire you.

People are looking for something to connect you to them; a narrative, a story that makes you relatable and relevant. People buy YOU first because who you are is always more important than what you do, how you do it, and why you do it. That’s a universal law; better than that, it’s how we are hard wired.

A platform for using persuasion language for influence is built upon a foundation of transparent genuineness, an overarching narrative, factual proof, visual language, and storytelling.

To engage and connect with an audience — whether it’s 1,000 people or just one decision maker — requires that you activate their brain’s emotional and rational hemispheres. As seasoned speakers and presenters know, most audience responses to “calls to action” are based on emotion.

The ethical and positive use of influence and persuasive language can establish relationships; it can motivate and inspire others into action; and it can span differences that separate, divide, and alienate us from each other.

The artful application of ethical influence and persuasion give you the “unfair advantage” in a competitive marketplace by helping you outmaneuver the competition with a stellar professional brand. It’s about stacking the deck in your favor with an empathetic communication vocabulary, a leadership style that positions your value and expertise, and a history of consistent performance.
Develop your professional brand

Who knows you? Who knows your work?

Originally published May/June 2012

With the economy and the job picture in flux it’s a great time to reassess your career goals, determine if a job change or a new career is around the corner and rethink how your peers and decision makers perceive you as a professional in the marketplace.

In 1982, best-selling author John Naisbitt wrote in Megatrends” about society being in a “time of parenthesis” — the time between eras, a time of change and questioning; a reconceptualizing not just of society but also culture. Certainly the recent recession — the worst since the Great Depression of 1929 — created another period of change and questioning for citizens of this globe, but it also created opportunity for many.

When I worked for Intel Corporation, one of the key strategies that contributed to the company’s success and ability to withstand the onslaught of economic downturns in the semiconductor industry during 2001 through 2004 was its strategy to accelerate product development when all its competitors were cutting back on R&D budgets.

Intel understood that, eventually, the recession in its sector would end, and rather than ramp up product development when the bad times were fading in the rear-view mirror, they were poised to take
advantage of the improved market by launching new products at the first sign that the economic recovery was a trend and not just a single data point.

The 2008 recession has only magnified the rapid changes already underway in global demographics, economics and technology. These paradigm shifts are influencing the restructuring of domestic and international corporations and their allocations of all forms of capital.

One of the important strategic and tactical shifts is in the workforce arena — the effects of which reverberate through the entire employment chain. Decision makers now seek candidates who have quantified their achievements as problem solvers and “game changers” — those who’ve tackled challenges in mature and emerging economies.

Creating and promoting your professional brand will help you take advantage of opportunities you can’t even see yet. My career in the corporate world within different markets has taught me that building brand value involves two important components: making others aware of the brand in question and creating a brand image that generates positive associations.

The same principles apply in the workforce arena regardless of your situation. If you’re looking for permanent or contract employment, wanting to move up the rungs in the company you work for or promoting your own business and seeking clients, here’s your task:

- Create positive associations among your quantified accomplishments, professional skills, knowledge, and experience and the people with a need for that expertise.
• Others will promote your brand based on your perceived professional and personal reputation as a fraud examiner. So, take the initiative and give them the right components. Here are a few ways to get your name embedded in the “associative models” of others:

• Write articles for association and industry publications.

• Give presentations or workshops at association meetings and conferences.

• Network with other professionals (especially influencers) in your field.

• Use social media to expand your circles of influence. (Be sure you have something valuable to say; the virtual world is already overflowing with mindless blather.)

• Write a book on a topic or issue in your profession or industry.

Intel offered me a manager position back in 2000 based on a single phone call — and I wasn’t even looking for a job. The director who phoned read one of my recent articles in an association journal, saw my columns in management newsletters, and had heard me speak at several national conferences in the high-tech industry. He contacted me to see if I’d be interested in a management position with the company.

He told me over the phone, “I’ve read your articles and papers for a couple of years and have heard you speak at conferences … it’s as though I feel I know you already.” Without knowing it, I’d created brand awareness in this decision maker’s mind, which enhanced my brand equity. As a result, I enjoyed a successful six-year career with Intel from that one phone call.
A positive brand image helps solidify your position in any job or career opportunity. It can differentiate your expertise from your competition and move it toward “preferred candidate” status. A positive brand image can command a higher salary and encourage decision makers to seek you out as happened to me.

Elements of your professional brand

Three important elements of building a brand image will determine how decision makers will respond to you (the “product”): favorability, strength and uniqueness of your offering.

- Favorability relates to how strongly you’ve honed your interpersonal and emotional intelligence skills; it’s also the “likeability factor” decision makers seek. They want to know if you’ll be a good personality fit with the team and if you can integrate into the corporate culture.

- Strength addresses the degree of your development of the requisite and optional skills and how well you might utilize those skills on current and future projects.

- Uniqueness of your offering is determined by these questions: What differentiates you (as a “product”) from other candidates for the position? What separates you from the competition? The more unique those differentiations (and the more value employers perceive you have), the stronger your brand image.

Unique brand associations fall into two major categories: attributes and benefits.

- Attributes relate to your technical or specialized performance on the job
• Benefits are the specific brand features you project and that decision makers value. Benefits can be functional, which represent features of your expertise. They can be experiential, which are linked to your technical/specialized prowess and your fit with a team or group. And they can be symbolic, which relate to the decision maker’s self-concept, his or her higher order social and self-esteem needs and even how he or she sees her standing in the entity.

Don’t underestimate the importance of symbolic benefits tied to your brand. If a decision maker believes that bringing someone like you with a strong brand on board, chances are such a move will enhance their value with the organization (people will notice), then you’re as good as hired.
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The role of professional credentials in the job market

The right credentials and designations kick open the door wider, but you still need the right degree and experience to open it.

First published January/February 2013

Not all professional credentials are created equal. They’re vital for professionals seeking to advance or change their careers, but the extent of credential value and use varies from one industry to the next. Therefore, it’s important to understand exactly how a professional credential/designation can best serve your career aspirations.

Many credentials are awarded after rigorous exams and verified experience; some may require a degreed standing as well. They attest to the knowledge and expertise of the credential holder. An example is the Certified Fraud Examiner (CFE) credential, which is highly regarded and valued within the anti-fraud profession. (Of course, you can’t expect a CFE after your name to always help if you want to transition to a field outside of the one for which the credential serves.)

The proper credentials can make it easier to climb the corporate ladder with your current employer or help push open doors a little wider to those professions that may lie on the periphery of your functional expertise.
Core competencies

When I worked as a geologist and program manager from 1980 to 1985 with Phillips Petroleum, I was part of the first group of geologists managers to become certified on Intergraph digital workstations that were used for oil and gas exploration mapping.

The week-long startup class paid off when I got laid off from my last oil company job in 1986 when oil went to less than $10 per barrel. Nine months later, I got hired by a company that developed geological mapping software — for use on Intergraph digital workstations and other large computers. You can see the relationship between the two jobs/careers that the certification helped bridge. My résumé at the time focused more on my technical and computer skills than my geology/ geophysics skills and experience because those were the skills that had the best chance of being transferred to a tangential field.

And that is the key to using credentials, certifications or licenses when changing careers. Imagine that your functional expertise is a large circle, and all the ancillary skills, knowledge and expertise (called core competencies) are smaller circles overlapping all around the edge of the larger circle. Some circles have a larger overlap than others, depending on the strength of the expertise in those peripheral areas.

Career changes are easiest to manage when the transition is from an existing functional expertise to one of the overlapping core competencies. In time, that core competency becomes the new functional expertise. The CFE credential can be very beneficial for such related career transitions.

Career changes are far more difficult when trying to move from one functional expertise to another — jumping from one large circle to
another that has very little or no overlap. Usually, such career changes involve additional education (college degrees, other certifications and licenses, etc.) not to mention some experience in that field. Be mindful that many recent college graduates are entering the workforce already armed with bleeding-edge knowledge and the latest skills. With mid-career changers and college graduates competing for the same positions, lower compensation requirements for RCGs will in many instances drive the decision as to who gets hired.

**Time of parenthesis**

I wrote *Confessions of a Hiring Manager Rev. 2.0* (Second Edition) when the 2008-2011 recession had created another “time of parenthesis” as John Naisbitt called the 1980s in *Megatrends*. The education system must respond by preparing individuals to help shepherd business and technology processes in mature and emerging economies over the coming decade.

Online colleges, business and trade schools, community colleges and certifying organizations must step up to meet the demand for qualified professionals to address the challenges and opportunities the world economy will face. The respected CFE credential conveys trust, integrity, and expertise for all who possess it and confidence for all who call upon it when needed.

**When credentials attack**

There is such a thing as having too many credentials. While the proper mix can enhance your career potential, too many of them signals to decision makers that perhaps you’re a “credential chaser” (seeking even more additional three- or four-letter acronyms after your name) who prefers the image over the
Donn LeVie Jr.

substance and purpose of credentials. Too much of a good thing can be detrimental to your job and career strategy.

Purge all outdated, irrelevant certifications and designations from your résumé and signature block. Those non-valid certifications scream, “My skills are outdated and I only rarely update my résumé.”

If you have many valid and relevant professional designations, select just the ones that best support your expertise for the position(s) to which you are applying.

Decision makers are most interested in only those certifications and licenses you actually possess and not all the courses you took along the way or what you hope to complete in the near future. In some instances, candidates use this approach to disguise the fact that they may not have the requisite educational requirements. Decision makers are wise to this ploy.

If you work in the public sector and have a long list of certifications or designations obtained through government training and testing, keep them in a separate document that can be used as part of your documentation portfolio. Place just those certifications that are relevant to the position on your résumé. §§§
Don’t underestimate the importance of a cover letter

It’s your personal sales and marketing brochure where you promote your branded value and expertise.

First published November/December 2014

Every so often someone asks me, “Do I really need a cover letter these days, even when a job ad doesn’t ask for one?” Some decision makers think that a cover letter is a waste of time because they don’t get read. Well, they often don’t get read because most are poorly written and are created more as an afterthought instead of being developed with intent and purpose.

Cover letters are another document to attest to your value

Done correctly, a cover letter is another document in your portfolio that attests to your professional expertise and your brand. It summarizes in a high level—with a touch of marketing panache—the accomplishments and capabilities detailed on your résumé with only minimal explicit verbatim repetition.

The best cover letters are written after the résumé has been polished much the way the preface of a book is written after the manuscript is finished. The résumé provides the raw materials for the cover letter, the purpose of which is to get the decision maker to look at the résumé.
Decision makers that don’t read cover letters and go directly to the résumé often miss out on a candidate who may be a notch above the competition simply by how they sell their professional brand in the cover letter. If all I do is scan résumés, then I’m just looking for another employee; I may inadvertently pass over the problem solver, the solutions provider, or the game changer my team or company needs because I might have missed a convincing cover letter.

The cover letter is another form of documentation that attests to your professional brand. For consultants, the letter of introduction serves the same purpose as the cover letter and contains the same underlying message: *I understand your business and the issues you face every day; when you need that value-add professional who has a demonstrated record of accomplishment and success, you call me.*

The cover letter must do these things to get the decision maker to look at your résumé—or perhaps get you called in for an interview based on the strength of your cover letter along as it did for me three times early in my career.

**Use fewer instances of “I/me/my/mine”**

It must speak to the decision maker’s needs, not your own. Getting hired is never about you; it’s *always* about what the decision maker needs. You do that by following the rule of thumb that says your cover letter should have the same or more instances of the words *you/your/yours* than of the words *I/me/my/mine*. That’s just simple advertising copyrighting put to work in your cover letter.

**Can you quantify your accomplishments with numbers?**

Quantified accomplishments pulled from your résumé communicate to the decision maker that you do, in fact, have a
proven track record (just saying so without the evidence to back it up is a far too common problem). Decision makers understand numbers more than words. The raw number of arrests you made as a government agent may not mean anything to a decision maker but a conviction rate (percentage) certainly will. Rethink your numbers using the decision maker’s criteria.

You have 5 to 7 seconds to get a decision maker’s attention with your cover letter. You don’t do that by beginning with, “Please find enclosed my resume...” You start it with a rhetorical question such as, “Do you think that Company ABC would want a financial risk management professional who has accomplished the following:” and then you follow that with a short bullet list of quantified accomplishments pulled from your résumé.

Leading with a rhetorical question whose only rational response is “yes” is a tactic from the psychology of influence that has you escorting the decision maker deeper into your cover letter and the other accomplishments that support your contention that you are the perfect candidate.

**Cover letters let you be an unabashed self-promoter**

You can put on your slightly assertive unabashed self-promoter hat when creating your cover letter but only if you have the quantified accomplishments to back it up. Writing something like, “When you need that auditor who has identified more than $XXXX in disallowed write offs, you call me: John Doe“, is perfectly legit if that $XXXX number is also on your résumé. But without the evidence to support that assertion, you’re just “all hat, no cattle“ as they say here in Texas.
YOU must take control of the next step in the hiring process

Always take control of the follow-up in your closing paragraph. Never write about “hoping to hear from you” or “thank you for your consideration.” Tell the decision maker you will call in a few days to discuss further how you are that value-add professional for the position — and then follow through with the phone call.

Whether you speak to the decision maker directly, leave voice mail, or talk with an administrative assistant matters not. Taking control of the follow-up gets your name across the decision maker’s desk again. Keeping your name out front throughout the entire hiring process — especially after interviews are finished — is key to improving your chances of getting the job offer by increasing familiarity with who you are and the value you can provide.
Ten things to do before and during interviews with employer representatives at conferences

Sell the sizzle, not the steak to get to the next step: A job interview

First published as guest blog post, June 2015

One of the great benefits of attending conferences is the opportunity to speak with career coaches, decision makers, and employer representatives. In a way, being able to interview with employer representatives gathered together in one location is sort of like speed dating: you want to show up prepared, be a great listener, and leave a positive first impression that begs the employer representative to want to know more about you — and even perhaps discuss a long-term relationship in the way of a job or career.

So how do you ensure you’ve done all you can with your prep work for interviews? Here’s a short ten-item list — from an expert decision maker’s perspective — that will help you present the best possible YOU in front of potential employers.

1. The entire screening/interview/hiring process is not about you: it's about the decision maker's needs. That's why you need to be a great listener so your responses to questions address the decision maker's requirements. Gauge all your responses and questions toward conveying
the image that you are a problem solver, a solutions provider, and a game changer.

2. Bring a cover letter with you. The cover letter is your introductory brochure that is designed to get decision makers to look at your résumé, but it also serves as another tool to promote your professional brand. Ensure your cover letter has these important elements:

- More instances of the words “you/your/yours” than “I/me/my/mine” — it's a ballpark indicator that your cover letter is more about the decision maker's needs than your own.

- Your cover letter is no longer than one page and is addressed to an individual, if known. Perform due diligence to find the name of the person or persons you’ll be interviewing with.

- Pull your major accomplishments (not duties or responsibilities) from your résumé and place them in a bullet list in your cover letter. Even FAR better is if you can assign quantitative value (revenue generated, costs avoided, percent improvement, etc.) to those major accomplishments.

- Never "hope to hear from you at your earliest convenience" — always state that you will be following up with a phone call in a few days to discuss how you can add value to the decision maker's efforts. If you want the job, you have to eliminate all other candidates from consideration; just ending your cover letter or interview with, "hoping to hear from you" places you at the mercy of other candidates who are more hungry.
3. Know your résumé inside and out...it is the script with which you launch your responses to many of the interview questions you will encounter. You should be able to elaborate on any bullet point and item on your résumé.

4. Besides an error-free, professional looking résumé, bring with you a list of references just in case you are asked for one. If not, resist the urge to leave it with the employer representative and any other documents and collateral you may have with you. Folks don't want to be lugging reams of paper back on the plane with them. The right way to distribute supportive documentation is over time after the interview.

5. The worst response to the inevitable question: "So, tell me about yourself..." is "What do you want to know?" With a response like that, you could no longer be considered for the position for which you are interviewing. You've just been given a golden opportunity to describe yourself in a way that will be memorable to the interviewer. Example response to the question: "I'm a cello player and kids' soccer coach who serves on the PTA board, and who enjoys working on challenging projects always with an eye on the bottom line and the customer's success. I do that by...."

6. Ask questions of the interviewer(s) about the biggest challenges facing the team, department, or business unit, and take notes. Show you are interested in the position by actively participating in the exchange of information.

7. Study after study reveals that the first and largest hurdle to overcome with a decision maker is to be likeable. If a decision maker likes you, he or she will be more interested in you (they are hiring you, not your résumé). If you come across as arrogant, pompous, or disinterested, that may be
too big a hurdle for them to get over, regardless of your expertise. Decision makers don't need a squeaky wheel on the team or in the department who could disrupt an existing positive team dynamic.

8. Maintain good eye contact without making it seem like you are trying to hypnotize the interviewer. Good eye contact communicates interest and focus. Consider your surroundings: you're not a corporate office — you're at a conference, so things are a bit more informal. Let your personality come through but always frame it professionally.

9. At the end of the interview, ask for the follow-up, don't just treat the meeting as a one-shot affair. Think of it as the first of several meetings or communications with the individual or the company. Ask: “I'd very much enjoy discussing how I can be that value-add asset to the company...can we set up a date and time on our calendars?” Just like the close of your cover letter.

10. Don’t be a pest. After your interview, leave the area. Respect that fact that there may be other people who are scheduled after you to be interviewed. I once had an employer rep tell me she once had a candidate “shadowing” her throughout the conference and made her feel a bit uneasy. One person’s shadowing might be considered another person’s stalking. §§§
Making the jump from the public sector to the private sector

They do things a little differently in the private sector

First published January/February 2014

When I left the employ of the federal government in 1980 after two years with the U.S. Department of Commerce-NOAA, I had no problem getting interviews and many job offers from major oil companies who were desperate for experienced geologists.

Today, public-sector employees who want to make the transition to the private sector find a different environment. As we know, government in many of its areas works quite differently from businesses. Some can find that the cultural shift they need to make to be successful can be a stumbling block. This paradigm change requires time and commitment to grasp how business processes are integrated both vertically and horizontally and how they all work together to generate revenue and profit (“meeting the numbers”).

The good news is that since 9/11, many federal government agencies have embraced the idea of horizontal integration so they can move further away from rigid “silo” mentalities and segmented (in serial fashion rather than in parallel) responses to changing conditions.
Dynamic exchanges and collaborative processes among agencies foster cooperation that mitigates risk and threats and can take advantage of opportunities more quickly. Such a shift in how government operates minimizes past problems of public-sector-to-private-sector transitions.

**Now, let’s get practical**

Okay, let’s home in on some practical advice for making the jump to the private sector. First on the agenda: your résumé. To be clear, unless you’re applying for a fellowship or large grant, or an academic, research or scientific position at the Ph.D. level — all of which demand a curriculum vitae (CV) — you use a résumé.

A résumé is a one- or two-page summary of your skills, experience, accomplishments and education; it’s short on duties and responsibilities. A résumé is brief and concise. A CV is longer — at least two pages and usually many more — with additional detailed information. Too many online job banks and websites confuse the two documents and their purposes, so beware.

I’ve seen some of the forms the government forces upon workers to document every event of their professional work lives, and that level of detail just won’t get the attention of a private-sector decision maker. You have to boil it down to major accomplishments, skills and experience and leave the details for another time (such as the interview).

You have to understand and be comfortable with the idea that the hiring process is a staged release of information that provides more detail as you move forward in the process; it’s not a document dump at your first opportunity.
Next, determine your skills, knowledge and expertise that you can transfer from the public sector to the private sector. All of that can be dropped into five different buckets:

- Technical abilities/problem solving
- Leadership/relationship building
- Communication clarity
- Ability to influence people and projects
- Business knowledge

Depending on your present position, duties and responsibilities, some of these categories of transferable skills may already be in good shape. For individuals exiting the military and seeking jobs in the private sector, communication clarity is typically one that needs much work. With the possible exception of the high-tech field, most business and interpersonal communication in a business environment doesn’t revolve around obscure acronyms, abbreviations, initialisms or phraseology ("that’s a five by five", military slang).

The language style in your cover letter and on your résumé must reflect that of the private-sector decision maker. Why risk losing his or her interest and attention with arcane terminology?

**You need actual accomplishments**

Another big problem for people moving from the public sector to the private sector (especially the military) is with relating job functions and accomplishments. Too many of those résumés list only duties and responsibilities. Decision makers are interested in accomplishments, which are those elements that contributed to the strategic direction above and beyond duties and responsibilities.
You can see the bigger picture of a duty or responsibility by asking: “... and this duty resulted in ... what higher strategic contribution?” Your résumé must rise above the daily task list and enter the realm of accomplishments.

Here’s an example from the résumé of a veteran wanting to work with a government contractor. We went back and forth with his résumé duties and converted them to accomplishments with additional quantifying information: “Performed maintenance for several Abrams M1A1 tanks” then becomes “Maintained three state-of-the-art Abrams M1A1 armored vehicles valued at $13 million with XXX hours MTBF (mean time between failure) for a 92 percent uptime efficiency rating.” Now, that’s an accomplishment.

**Core competencies**

Another way to speak the language of the private-sector decision maker is to see how a particular skill set involves several individual skills. Several skill sets contribute to what is called a “core competency” (which is a combination of skill, knowledge, and expertise) that fulfills three important criteria:

- It’s difficult for a competitor to imitate (unique skills, knowledge, experience).
- It can be repurposed for other products or markets (multiple application).
- It contributes to end user’s experienced benefits (it adds value to product/service)

Several core competencies contribute to what is called a *functional expertise*, which is simply a higher level of integrated skills, knowledge and expertise that work together. A functional expertise also reflects a career-long exposure to a particular job or
functional area. Employees with high levels of functional expertise can create a competitive advantage or market dominance for an individual or company in the private sector. See Figure 1 for an illustration of this concept.

Figure 1. Turning functional expertise into competitive advantage.

To sum up:

• Lose the jargon and unfamiliar terminology in your cover letter and résumé.

• Categorize your transferable skills using the five buckets (quantify accomplishments whenever possible to speak to the decision maker’s needs).

• Think transferable skill set → core competency → functional expertise.

• Think résumé, not CV; the hiring process involves a staged release of information. Extend it past the interview stage by using the “continuous promotion approach.”
Donn LeVie Jr.
Critical thinking skills and business intelligence

What decision makers look for in experienced, professional candidates

Paper published in the proceedings of the Association of Certified Fraud Examiners Global Fraud Conference

Today, more employers and decision makers are seeking candidates who possess “executive intelligence,” not just leadership and personality. But being able to assess so-called executive intelligence has proven difficult because, outside of IQ tests, no such standardized assessment exists, though IQ tests do a good job of predicting managerial success more than any other assessment.

But high scores on an IQ test by academicians does not guarantee brilliance in the corporate world because it’s a different type of intelligence. Decision makers can’t tell just by reviewing a résumé whether someone has business or executive intelligence because most candidates emphasize duties and responsibilities rather than achievements and accomplishments that contribute to higher strategic objectives.

However, for decision makers to predict a candidate’s ability for success in a particular skill, they first must examine the cognitive knowledge that candidate possesses that directly influences success with that activity in a business context.
Nearly every type of work can be divided into three basic categories, each with dependent sub-skills: (1) getting work done (task focus); (2) cooperation between individuals and other functions (people focus); and (3) personal behavioral flexibility (self-focus).\(^1\) Table 1 is a detailed breakdown of the sub-skills that comprise these categories.

### Table 1. Three categories of work and associated sub-skills.

<table>
<thead>
<tr>
<th><strong>Task-Focused Skills</strong></th>
<th><strong>People Focused Skills</strong></th>
<th><strong>Self-Focused Skills</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify and define problems along with their immediate and secondary issues.</td>
<td>Acknowledge and anticipate how different perspectives can lead to different conclusions.</td>
<td>Reflect on honest feedback that identifies errors in decisions and adjust accordingly.</td>
</tr>
<tr>
<td>Foresee obstacles to solving problems and create alternative solutions.</td>
<td>Be aware that others may have an agenda different than your own because of different priorities and objectives.</td>
<td>Be aware of your presuppositions that may limit your perspective and temper your thinking and actions with this awareness.</td>
</tr>
<tr>
<td>Review the soundness of your underlying assumptions before working toward solutions.</td>
<td>Anticipate different responses by individuals to actions or communications.</td>
<td>Don’t hesitate to acknowledge errors in thinking or actions or implement drastic courses of corrective action.</td>
</tr>
<tr>
<td>Rephrase in your own words the pros and cons of the arguments of others so that you are working from common context.</td>
<td>Avoid focusing on issues or positions peripheral to the central one(s) that is at the heart of disagreement or difference.</td>
<td>Communicate the critical errors or weaknesses in the positions of others while recognizing any strong suites.</td>
</tr>
</tbody>
</table>

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\(^1\) Justin Menkes, author of *Executive Intelligence* (HarperCollins, 2005) refers to three categories of managerial work as: (1) accomplishing tasks, (2) working with and through others, and (3) judging oneself and adapting one’s behavior accordingly.
<table>
<thead>
<tr>
<th>Task-Focused Skills</th>
<th>People Focused Skills</th>
<th>Self-Focused Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand the knowns, the unknowns, and the best approaches for acquiring the missing information needed to move forward.</td>
<td>Anticipate probable and possible unintended consequences from any course of action.</td>
<td>Know when to resist objections and to hold fast to a sensible, reliable course of action.</td>
</tr>
<tr>
<td>Explore all viewpoints to uncover any possible unintentional results from implementing any action.</td>
<td>Stakeholder management requires an awareness and balance of different requirements.</td>
<td></td>
</tr>
<tr>
<td>Approach projects with a sense of ownership, which is a quality mindset--a get-it-done-right-the-first-time attitude.</td>
<td>Maintain a desire to help others succeed without expectation of anything in return the same way a candle loses nothing to light another.</td>
<td>Maintain an attitude of being self-employed regardless from where that paycheck comes; it is an empowering attitude that will be recognized by the right people.</td>
</tr>
<tr>
<td>Approach projects with a sense of urgency, which is a purposeful, resolute focus to getting things done.</td>
<td>Maintain a sense of the graceful exit because your reputation will continue to linger in the hallways and cubicle neighborhood for some time after you leave a company.</td>
<td></td>
</tr>
</tbody>
</table>


“Getting work done” is, in part, the ability to differentiate among primary and secondary objectives, and/or competing priorities.

“Cooperation between individuals and other functions” demands a balance between hearing and understanding the needs, ideas, and
agendas of others up and down the corporate structure, evaluating the merits of their contributions, and articulating the most clear-cut path to resolving problems for the overall organization.

“Personal behavior flexibility” requires constant self-assessment to ensure your own presuppositions and personal biases don’t obscure better solutions, actions, or communication from others while also maintaining a steady course through objections and resistance for assured success.

In fact, if your experience already embraces most or all of these skills, a response to the always-asked past behavioral interview (PBI) question: “What are your greatest strengths?” might be:

Others would say I can discriminate among competing objectives and priorities; that I can balance understanding of the different issues and agendas of other stakeholders, determine the merits of their contributions, and argue for the most effective resolution to a problem; and, that I always check and recheck my bias so that I don’t overlook a better solution or action offered up by others.

Critical thinking isn’t limited to the executive boardroom or the corner office; all professionals must have clarity of thought to critically examine underlying assumptions about work/job-related issues or problems and identify probable and improbably consequences of any actions undertaken to resolve issues or problems.

Honing one’s critical thinking skills comes from years of experience solving business or technical problems—it is a natural, flexible, ever-developing integrated collection of cognitive proficiency. Most decision makers are interested more in the “how you did it” (the critical-thinking process) rather than the “what you did” (the critical-thinking result) in behavioral interviews. The difference between the underling and the manager’s application of critical
thinking is in degrees or relative contribution to the overall corporate strategy.

Most decision makers recognize that PBI questions are simply another initial filter through which candidates must pass. How well a candidate performs with PBI questions is more a function of experience, job knowledge, and social skills (especially the ability to clearly articulate responses); however, the PBI format measures knowledge, not intelligence; it is more a measure of a candidate’s ability to recite his or her previous experience and job knowledge, with perhaps more details than what the résumé provides. PBI asks how a candidate performed a task or achieved some result.

To assess business or technical intelligence, candidates must demonstrate to decision makers their expertise with interview situations that reveal their ability to navigate using task-focused, people-focused, and self-focused elements in these scenarios. Résumés and PBI techniques help provide a picture of a candidate’s previous experience; situational interviewing helps predict a candidate’s future performance so long as the situations presented parallel the context of actual on-the-job circumstances. Situational interviewing asks how would a candidate perform a task or achieve some result.

For example, software programmers undergoing situational interviewing may be asked to demonstrate their programming ability to solve a unique problem. Different approaches may arrive at the same solution, but the candidate whose logic and cognitive skills are more apparent may provide a better indication for future success.

I have participated in situational interviewing as a member of a team of interviewers for applications engineer candidates. With a candidate’s résumé in front of us, we would use the PBI technique
initially, and then present a situation whereby the candidate was asked to draw on a whiteboard a schematic of a particular microprocessor circuit and asked to connect a new but problematic component to the circuit. We also asked the candidate to verbalize his thought process so we could get a peek at the logical analysis at work resolving the issue. Such an approach can provide a higher probability of hiring stellar talent.

If confronted with similar situational interviewing scenarios, candidates should articulate their thought process for the interview team even if not asked specifically to do so. The wise candidate will use this as an opportunity to present problem-solving skills and perhaps approach it as a demonstration of his or her expertise (others may even learn from it).

According to research, the PBI can account for 25% of the variances in performance among candidates, and situational interviewing another 25 to 35% with little overlap for a better assessment (50 to 60%) of a candidate’s potential. The remaining 40 to 50% is associated with other factors, such as “likeability”, being a good fit for the team or corporate culture, references, and so on. But in the end, a hiring decision is still a prediction of future success based on incomplete data.

To be sure, many HR professionals use a variety of standardized assessments for recruiting and hiring, and these “predictive performance” appraisals provide additional information for making sound decisions for offering employment to candidates. However, standardized assessments are not a panacea and some in-house varieties lack the statistical scrutiny for reliability and validity; they are simply another set of tools with which decision

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makers and HR professionals working together can further qualify the knowledge, skills, expertise, and business intelligence of applicants. §§§
In-house objective assessment tools

How valid, reliable, and useful are they for making hiring decisions?

Paper published in the proceedings of the Association of Certified Fraud Examiners Global Fraud Conference

Douglas McGregor wrote 53 years ago in *The Human Side of Enterprise* that “Behind every managerial decision or action are assumptions about human nature and human behavior.” Those assumptions McGregor writes about are a necessity when decision makers must evaluate a handful of knowns and a boxcar full of unknowns to predict the future performance success of a potential employee. Never is it as simple or as easy as just reviewing a résumé, performing background and reference checks, or conducting an interview. There are human factors that serve as a double-edged sword of sorts because their presence can both help and hinder arriving at a hiring decision that selects the best candidate for the position.

Various objective assessments are available to help decision makers evaluate potential candidates but the use of intuition and other subjective means cannot be ignored in the process—nor can they be elevated above any objective assessment either but are simply tools in the decision maker’s toolbox.

Many human resource professionals and decision makers believe that hiring failures (hiring the wrong candidates) are a result of
some shortcoming in the assessment process; yet they often forget that assessing and selecting the right candidate for the position involves substantial irreducible unpredictability. We simply cannot and will not be able to accurately predict the future performance success of any candidate at the time of hire.

An objective assessment must be valid, reliable, sufficiently difficult, and have some utility. Most such tools have undergone rigorous statistical testing for those predictors. However, to help with hiring decisions, many companies use in-house-generated assessments that may not have had the benefit of such statistical scrutiny.

For example, a decision maker designs a test to screen for predicting success at some task. The test is administered to 100 candidates, and only the top 10 scores on the test will be hired. All 10 hires prove to be excellent employees, but is that result enough upon which to base a hiring decision? Is the test a valid one for the position? Is it a reliable predictor of success? Three types of test evaluation are necessary to determine the answers to those questions:

- **Cutting Score**: a test score that denotes a decision point (hire/no hire, pass/fail, minimum score)
- **Hit Rate**: percent of cases in which a test correctly predicts success/failure of some task
- **Base Rate**: percent of cases that would succeed regardless of whether selected by the Cutting Score

Simple statistical calculations reveal that whenever the Hit Rate is greater than the Base Rate, the test can be considered valid and provides more useful information than relying on intuition in hiring decisions. However, most decision makers use just the Cutting Score as a foundation for making hiring decisions and may
not be aware of how well or poorly the assessment addresses validity and reliability. The result in such situations can many times lead to poor or premature decisions that may overlook more well-qualified/equally capable applicants.

Cutting score

A Cutting Score is simply the score on an assessment that serves as a decision point. For example, on a pass/fail exam used in a hiring decision, 70% correct may be the Cutting Score. People who score above 70% are selected to continue in the hiring process; those that score below are not. However, scoring higher than the Cutting Score does not guarantee success (some folks excel at tests but may turn out to be poor performers); and scoring lower on the Cutting Score does not ensure failure (some folks perform poorly on tests but could be successful performers).

When I was in college, I had some test anxiety in subjects I had to struggle with. Whenever a class offered the term paper option in lieu of an exam, I opted for writing the term paper. The term paper option helped boost my GPA, which was necessary for grad school.

Hit rate

The Cutting Score by itself is simply an arbitrary cut-off point that says nothing about the validity, reliability, difficulty, or utility of such a test as it applies to the specific criterion (skill, knowledge, expertise) being tested. The Hit Rate is the percent of instances in which a test correctly predicts success or failure regarding the specific criterion. The test setup looks like that shown in Table 2.
Table 2. Hit Rate Model: Decisions based on Cutting Score.

<table>
<thead>
<tr>
<th>On-the-Job Performance</th>
<th>Acceptable</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success</td>
<td>Hit</td>
<td>Miss</td>
</tr>
<tr>
<td>Failure</td>
<td>Miss</td>
<td>Hit</td>
</tr>
</tbody>
</table>

Table 3 shows hypothetical data collected in 60 previous tests.

Table 3. Hit Rate Model with Data: Decisions based on Cutting Score.

<table>
<thead>
<tr>
<th>On-the-Job Performance</th>
<th>Acceptable</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success</td>
<td>25</td>
<td>6</td>
</tr>
<tr>
<td>Failure</td>
<td>4</td>
<td>25</td>
</tr>
</tbody>
</table>

The Hit Rate statistical calculation is: 
$$(\frac{\text{Success}_{\text{Acceptable}} + \text{Failure}_{\text{Unacceptable}}}{\Sigma \text{Sum Total}})$$

$$(25 + 25)/60 = 50/60 = 83\% \text{ Hit Rate}$$

Base rate

The Base Rate is the percent of instances which a candidate would succeed regardless of whether or not selected by a Cutting Score.

Table 4 is the model for determining the Base Rate.

Table 4. Base Rate Calculation.

<table>
<thead>
<tr>
<th>On-the-Job Performance</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Success</td>
<td>31</td>
</tr>
<tr>
<td>Failure</td>
<td>29</td>
</tr>
</tbody>
</table>

The Base Rate statistical calculation is: 
$$\frac{\text{Success rate}}{\Sigma \text{Sum Total}} \text{ or } 31/60 = 52\%$$
Hit Rate = 83%
Base Rate = 52%

Because the Hit Rate is greater than the Base Rate, we can reasonably assume that the test is useful, valid, and reliable. The additional information now available beyond the Cutting Score provides more information about the test’s reliability and validity for evaluating a criterion than completely relying on intuition and other subjective measures in hiring decisions. Whenever the Base Rate is greater than the Hit Rate, the test may not be a reliable or valid indicator of the criterion being evaluated.

It is possible to calculate the cost of Hit Rates but that is beyond the scope of this chapter. The Cutting Score is used (often arbitrarily) as a tool to measure a candidate’s skill or knowledge of some criterion deemed important or critical to job performance. The Hit Rate and Base Rate are measures that help determine if that assessment tool fairly or unfairly represents the skill or knowledge deemed important for job success.

However, as HR and occupational psychology research shows, decision makers consistently place more value on subjective criteria when making hiring decisions, even when objective assessments have been subjected to statistical scrutiny for validity, reliability, and accuracy. Therefore, the candidate who understands the influence such personal bias can have throughout the hiring process—and ultimately the hiring decision—is in a better position to receive a job offer. §§§
Donn LeVie Jr.
What ‘American Idol’ can teach you about job interviews and networking

If you want to go to Hollywood, don’t beg and plead

First published March/April 2015

I enjoyed watching American Idol. I’ve seen so many parallels between how hopefuls audition for a chance to continue their quest toward fame, fortune, and a trip to Hollywood and how people approach job interviews. On American Idol, those who are really talented rise above those less gifted. But even among the very talented, we see significant differences.

We can almost spot the Top 10 contestants by how they handle their auditions. The ones who find the most favor understand what the judges are looking for: not only “the look” and great vocal chops but how a contestant gets lost in the moment of the audition. Or better yet: how those contestants are on their game when they deliver what the judges want.

The beggars and pleaders rarely make it through to the Hollywood round. If they do, they’re usually gone by the end of that week. They just don’t understand the nature of the auditions. They’re controlled by the emotion of the moment — perhaps overwhelmed by the celebrity status of the judges — but then they rely on the beneficence of the judges and hope they’ll get to the next round.
They’ve allowed their immediate surroundings, the presence of the judges or other external factors to exert control of their auditions. This behavior quickly and clearly labels these pleading hopefuls as amateurs and usually disqualifies them for further consideration.

Your job interview is your audition. When your game is on, you focus on what the decision maker wants and needs, and you own the audition — the interview — and the space in which you find yourself, rather than feel sucked into it like a semi-helpless victim.

**Beware of feckless schmoozing disguised as networking**

I empathized with the *American Idol* judges when contestants, after their poor auditions, subject them to tearful drama for some special consideration. I’ve seen it in the hiring process and with those who abuse the idea of networking.

Occasionally, I receive an email or phone call from a former colleague — perhaps someone I hardly knew to say “hello” in the halls — who wants to meet with me over lunch for undisclosed reasons. I’m reluctant to offend, so I used to agree with a modicum of enthusiasm because I knew what was coming: feckless schmoozing, an outright plea for a job, some good leads — or all three.

So now, I don’t accept the invitation unless I first know why. If the person is favor shopping, it’s okay to tell me up front; but to disguise it will always result in losing my respect and future assistance.

I call this approach “noxious networking” because it always leaves a bad smell behind. It’s a sign of desperation in which professional decorum takes flight before I’ve ordered an appetizer. Such people are interested only in what they can get out of a relationship and
not in how they may be able to help others. It’s a sure-fire way to ruin a potentially great networking contact.

Networking works best when it’s about building and maintaining mutual relationships — with a focus on the word, *mutual*. It’s best to nurture those relationships long before you need to use them; otherwise, it’s simply a selfish, self-absorbed, one-way strategy others will detect quickly. And you’ve likely burned key contacts for your job or career search.

Nurturing professional networks requires time and energy. You want to ensure you’re creating mutual professional relationships with those you can help and who can help you. Sometimes, the perceived benefits of such contacts are greater than actual ones.

**Be honest with network leads**

Just as it’s wrong to pass no-talents through to the next level in *American Idol* so is granting interviews to candidates you have no intention of hiring.

Back in the mid-1990s, the division director to whom I reported wanted to bring in three of his friends and former employees to interview for a vacant technical position on one of my teams. We received résumés of these possible candidates who had extensive experience in the aerospace industry with writing and illustrating technical specifications. They actually were more like engineering draftsmen but the boss insisted we interview them.

Members of my teams knew before the interviews that none of them qualified, and we probably would pass on recommending them. All the candidates worked in DOS-based environments and didn’t have any experience with the Windows-based applications we used.
The interviews lasted about four hours and, as we expected, we didn’t recommend any of the candidates for hire. The division manager thought he was helping his friends and former co-workers, but ultimately the interviews were just another disappointment for these folks. And we all felt badly that we had to waste these individuals’ time and possibly injure their dignity.

Are you a job applicant or a job supplicant?

The overt nature of begging and pleading for a job also smacks of misdirected energies. The very term “applicant” has synonyms such as “aspirant,” “contender,” and “claimant” that imply some degree of intent, concerted effort or purpose.

People apply for vacant positions, or they fill out job applications. The individual who must resort to pleading is known as a “supplicant,” which has as synonyms, “requester” and “petitioner.” An applicant who resorts to supplication when seeking a job either isn’t considered seriously for the position or might have to work harder to earn the respect of co-workers — if he or she is hired.

So, if supplication is your preferred approach, just remember how so few American Idol pleaders have heard judge Randy Jackson say …

“You’re going to Hollywood!”

Short-sightedness is often the reason American Idol hopefuls fail in their auditions. Many of the finalists put “being the next ‘American Idol’ ” ahead of the love of making music for the enjoyment of others as so many first-round wanna-be’s confidently proclaim to the viewing audience and the judges. Sometimes in the hiring process, short-sightedness comes across in candidates who
embrace the “I need a job” mindset rather than seeing themselves as the decision maker’s problem solver. It’s a matter of focus that makes all the difference in the approach to an audition/job interview.

**Finalists’ words of advice**

Whether you’re seeking a job within your industry or are considering a complete career change, heed the advice from *American Idol* finalists:

- Play to your strengths and know you limitations.
- Maintain an approachable, likeable personal style.
- Show some personality.
- Understand what the judges are looking for and need.
- Above all, demonstrate your talent.

As with *American Idol* finalists, the person who outperforms the competition, who brings to the open position the skills, knowledge and expertise the decision maker needs for the position — and promotes that expertise throughout the hiring process — is ultimately the person who carries the day.
Donn LeVie Jr.
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Why not getting the job offer, promotion, or contract isn’t all that bad (it’s fixable)

It’s not over until it’s over…

First published July/August 2016

W hat? You didn’t get that job offer you were hoping for, even though you followed all the right strategies and tactics (hopefully the ones I recommended in this book)? Well, there are some variables of the hiring process at play that you don’t have any control over, such as the state of the economy, the current state of your particular industry or profession, regulatory compliance that stymies job growth, or they’re just looking for someone with skills and experience that better matches their needs.

Build that associative model in the decision maker’s brain

Or maybe your associative model wasn’t very strong in the mind of the decision maker. An associative model is a type of neural activity that links your specific expertise/unique brand with the decision maker’s awareness of it. It’s a function of the human brain. The more times your name or brand is exposed to decision makers, the faster the neurons fire (accelerating recall), which increases recall and gets you to top-of-mind status. It can also lead to a preference for you and your skills, experience, and expertise.
But it’s not all bad and here’s why. Let’s look at the situation from a different approach.

Rather than bemoan the fact that you didn’t get the job offer, why not look at it in a more positive light: you didn’t get the job offer today. You can continue fortifying that associative model with decision makers who didn’t hire you today - but who might in the future.

So many people give up pursuing a dream job when someone else gets the job offer. But you don’t have to stop promoting your expertise and interest to that decision maker. Because you don’t know if the person who was hired will work out or quit in the meantime (don’t assume all employers will “keep your résumé on file”), there’s no reason to write off that opportunity — yet.

If the job is one you see as a great opportunity for enhancing your career, you can still strengthen the associative model in that decision maker’s mind.

- Honestly self-assess how well you think you performed in the hiring process; what might you have done differently if given the opportunity? Adjust any aspect of your documents or interview skills that need it.

- Three to four months down the road, send an email to the decision maker expressing your hope the candidate has worked out well for the position you applied for. This email continues connecting your name with your expertise for that position that someone else filled.

- A few months later, send the decision maker a reprint of a journal article or conference paper you had published using the “Trojan Horse technique” (attaching a Post-It Note to the document that says something like, “Hello
Decision maker...I just had this article published in <Association Magazine> and thought it addressed some issues of interest.” Then sign your name.

- The Trojan Horse technique works because you really don’t care whether the decision maker reads the article reprint; you do care that he or she looks at the Post-It Note (which he or she will) to see who it was from. It’s about creating name familiarity with decision makers for faster recall when it's time to render a hiring decision.

- Let all this simmer in the decision maker’s mind.

Promoting your expertise is an ongoing exercise

Of course, in the meantime you have been pursuing other opportunities and may have snagged a terrific job. The point here is that you don’t have to stop promoting your expertise after job interviews have ended and you don’t have stop promoting your expertise after the job offer goes to another candidate. Any decision maker is a good contact to have in your network.

Some folks may feel “I don’t want to seem like a pain to decision makers by doing this...” I understand, but that’s an employee attitude. The consultant’s attitude continues to promote the benefits of that expertise without placing time limits on that effort. And, you never know who will end up with that post-hire information you sent.

You never know who gets your résumé later

In 1993, I interviewed for a senior manager position at Motorola. I didn’t get the job but I followed up with the decision maker by sending him (using the techniques described above) a copy of a peer-reviewed journal article I had published. A few months later,
I sent him a copy of a column I wrote in an industry newsletter. I didn’t hear back at all from him.

One year later, a different director from Motorola contacted me to see if I was interested in a senior manager position with his department. I didn’t apply for the job — in fact, I didn’t know about it — so I asked how he came upon my résumé. He told me another director (the one I interviewed with a year previous) had forwarded it along with the other documents to his attention. I interviewed for the position and got hired.

When you embrace a consultant’s attitude toward the benefits of your expertise, you’ll realize communicating those benefits has no expiration date. Any particular job or position is simply a stop along your journey to a rewarding career. §§§
10

Becoming an authority in your profession

You have to work on who knows you and who knows your work

_Paper published in the proceedings of the Association of Certified Fraud Examiners Global Fraud Conference_

If you’ve ever wanted to be that voice of authority that always gets quoted in the business section of the newspaper, is the first person interviewed by TV and radio stations about some important development, or is invited as a frequent keynote speaker at conferences, then perhaps becoming a pundit, sage, or guru—an in-demand authority in your specialty—is your next move.

Dwelling in the land of such authoritative giants as Tom Peters, Michael Porter, Don Tapscott, Guy Kawasaki, Richard Branson, Steve Jobs, Tony Robbins, and others requires finely honed expertise, long-term vision, durable and flexible strategic planning, and an unwavering commitment to continue moving forward to avoid the one-hit wonder syndrome.

If the rarified air of that exclusive club sounds interesting, then here is a ten-item to-do list to help you get started on staying in demand. There are no secrets here; in fact, this list is simply a recapitulation of much of the information in this book—only at a higher, more focused level—as well as ideas and suggestions from people who are already in demand.

1. Write a book with a hook.
2. Build a platform off your book.
3. Create new buzzwords (dust off your portmanteau).
4. Get busy with promoting and expanding your platform.
5. Be remarkable in a way that makes you memorable.
6. Cultivate friendships with other in-demand authorities.
7. Make your billable authoritative expertise valuable.
8. Balance mental, physical, and spiritual health.
9. Remain modest and keep it real.
10. Don’t stop moving forward.

**Write a book with a hook.** Nothing says expert better than being published. Writing a book is practically a requirement for membership into national or international punditry. You don’t have to be a great writer or a former Fortune 500 CEO to qualify as a book author. Just have a message that addresses the current hot topics (visit digg.com; google.com/trends/hot_trends; or trendwatching.com for some ideas) and perhaps a ghostwriter to help you crank out that next *New York Times* bestseller. A literary agent can shepherd your manuscript to a publisher who will offer the best publishing deal.

If your manuscript includes charts, graphs, tables, and graphics, they can be used in other ways (articles, PowerPoint presentations, blog posts, etc.) your information is packaged and disseminated.

**Build a platform off your book.** The master platform builder I learned from is author and consultant Gordon Burgett (gordonburgett.com) who taught me the idea of topic-spoking my freelance writing nearly 35 years ago. Topic spoking is about
finding a core topic that people have an interest in, and then determining all the different formats for presenting that information to different audiences. Your book serves as the information focus from which workshops, seminars, keynote speeches, white papers, articles, blog posts, podcasts, YouTube videos, and perhaps high-dollar consulting opportunities flow.

**Create new buzzwords (dust off your portmanteau).** Part of being recognized as sage is the ability to create a new buzz term and tie your branded platform to it. By combining two or more words to create a new one, even old ideas take on new life. The linguistics term used to describe the combination of two or more words and their meanings into a new word that encompasses both meanings is portmanteau (a French word, but in England it describes a piece of luggage with two compartments). Here are some portmanteau examples already in use:

- **Smog**: smoke and fog
- **Stagflation**: stagnant economy with inflation
- **Likeonomics**: new global currency consisting of relationships and affinity
- **Momentarianism**: new political term for policies stuck in the present moment
- **Twitterrhea**: no explanation necessary
- **Extremedia**: media outlets that consistently report on events and persons on the periphery of newsworthy mention
- **Orchestrategy**: seasonal marketing plan and performance program for an orchestra
- **Guitarticulation**: sheet music markings for how notes are to be played on a guitar
More than 20 years ago I coined the term *valueocity* to define the speed with which an individual brings value to an organization’s higher strategic objectives through efforts above and beyond ordinary duties and responsibilities. I have used *valueocity* in articles, blog posts, workshops, seminars, and keynote speeches, and it’s now the working title of an upcoming book.

**Get busy with promoting and expanding your platform.** Don’t wait until you’ve finished your book. Articles, blog posts, PowerPoint presentations, speeches, and even notes on napkins can become seed material for book chapters, seminars, and keynote speeches. You already have some of the material you need to begin your journey to guruhood.

**Be remarkable in a way that makes you memorable.** Strive to be more like Sir Richard Branson and Bill Gates (outrageous stunts aside), whose PR activities are based on substance and backed by a solid team of creative minds. Aim to be less like Kanye West, who has a knack for making himself memorable in unflattering and embarrassing ways. There are ways to garner attention that reflect positively and in a big way on your carefully crafted brand and platform. You do that by showing others a bigger vision of themselves than what they see; you take them to the next level.

**Cultivate friendships with other in-demand authorities.** Nothing accelerates your journey to Yoda-type sagehood better than having well-known personalities cite your work, quote your quips, provide blurbs on the back cover of your books, or invite you to state dinners. There’s major influence in circles at that level, so cultivate your “A List” of people who may become your best promoters, spokespersons, and brand/platform expediters. You’re only six degrees of separation away from any other person on the planet.
Make your billable authoritative expertise valuable. There’s no other way of saying it, but when you’re making personal appearances, giving a keynote speech, presenting a seminar, or taking on consulting assignments, guru/sage/pundit/Jedi rates apply. It’s one of those long-held axioms, but the higher your fees, the more seriously you’re taken. Whether it’s a keynote address, seminar, or a consulting gig, people hire you not to confirm what they are doing correctly, but to learn what they are doing wrong and how to fix it. It sounds like an oxymoron, but the better you are at telling people what they don’t want to hear, the more they will pay you for it.

Balance mental, physical, and spiritual health. Yoda was 900 years old when he died; Plato was 81; Peter Drucker was 96. Sageness is bestowed upon those who devote decades of knowledge and experience to solving a plethora of problems. Gurus-in-training understand the importance of nutrition, exercise, spirituality, and other life-enhancing strategies in hastening their ability to attain sage status.

Remain modest and keep it real. To paraphrase Ralph Waldo Emerson, “A great man is always willing to be little...without being belittling.” Although eating crow should be avoided in general, there may be times when it must be part of what Winston Churchill called a “wholesome diet.” When it must be consumed, it should be done so in public. A real apology begins with, “I’m sorry that I...”; it does not begin with, “I’m sorry if I...”.

Don’t stop moving forward. You may find yourself wrestling with your ability to tackle one or more of the items on this list. If you believe you can’t, then you’ve set into motion a self-fulfilling prophecy. It’s true you can’t do them all at once, but you can do some all at once and others in a step-wise fashion over time. None
of them involves compromising your ethics or morality, but all of them demand a concerted effort at any level of your career for you to excel at...

…the art of the unique — or secret — advantage.
Three leading questions YOU must ask during a job interview to seal the deal

You have to learn the rules of the hiring process to get an offer

You’ve done it! You scored a job interview! Nice work. Evidently your cover letter and résumé revealed something of interest to a decision maker and the company wants to pursue that interest. You are one step closer to closing the deal and getting a job offer or contract.

But, let me warn you...

I often have seen highly qualified candidates on paper let opportunity slip their grasp during job interviews. Whether it’s nervousness, not being prepared, or some other excuse, they allow the interviewer to commandeering the interview process rather than controlling it themselves. The job interview stage is usually where a “go/no go” decision is made whether to keep you moving forward in the hiring process. If job interviews are your weak spot, well, fear not, because I’m going to show you how to subliminally position yourself to improve your chances of getting you to that next step in the hiring process: The job offer.
Be aware of the decision maker’s world

What helps your overall approach to a job interview is understanding a little of the decision maker’s world. Like all other people, decision makers have their own presuppositions and preferences—especially when it comes to candidate selection. Sometimes those characteristics cloud their objectivity, which can work in your favor with the right strategy and approach.

At times, a decision maker may have someone in mind for a vacant position who has the same skills, knowledge, and experience as the person who previously held that position. That kind of baseline, however, can prevent the decision maker from recognizing a new candidate’s similar or superior—but not identical—expertise.

A decision maker may also have an idealized vision of the successful candidate, which interferes with being able to recognize the most qualified candidate available (these types of examples are referred to as “positive prejudice”). The different varieties of positive prejudice (not the illegal kind) are why I refer to the hiring process as “navigating the mindfield.”

Your two initial challenges

Probably the biggest challenge for job interview preparation is the seemingly limitless variety of questions you’ll be asked. The first and most obvious strategy for you is to know your résumé inside out. Your résumé is your basic script for many if not most of your responses to questions during the job interview. You may have several single-line bullet list items on your résumé, but you should be able to speak at length to the details (and the blood, sweat, and tears) behind every one of those items.
Depending on the position and industry, decision makers may be interested in accomplishments and achievements as a priority; duties and responsibilities only secondarily as long as you relate them to the strategic objectives of the organization. You have to understand and be able to clearly articulate how your daily tasks connect to the larger organizational objectives.

The second biggest challenge is to avoid walking into an interview situation with an “employee” attitude. Instead, wear your “consultant” attitude because that decision maker has a need for a problem solver and solutions provider. YOU must assume an attitude that projects YOU as that problem solver who brings the necessary expertise (along with an accomplishment-focused résumé) to affirm that assertion. That attitude assumes taking on a more proactive approach to the job interview, rather than a hat-in-hand demeanor.

Don’t just show up for the interview; own it. You are the candidate with value and expertise they seek.

**Irreducible unpredictability**

Decision makers work at a disadvantage when evaluating which candidate has the best opportunity for success in any given position. Because data used to evaluate a candidate’s probability of on-the-job success is fragmentary (a cover letter, a résumé, one job interview, brief statements from references), incomplete, and may include partial truths or exaggerations, candidate selection sometimes comes down to a “best guess.” In other words, decision makers have to deal with the reality of irreducible unpredictability.

But there are ways you can further minimize both the irreducibility and the unpredictability with a three-pronged approach using **Pre-Engagement, Direct Engagement, and Post-Engagement** strategies.
Let’s look at an important aspect of the Direct Engagement strategy: Pre-Suasive tactics.

In my seminars and group mentoring programs, I teach people a variety of *pre-suasive* techniques for leading decision makers to the decision to hire them over other candidates.\(^3\) Let me briefly describe three questions to ask of decision makers that should be in your Direct Engagement interview preparation kit if you’ve successfully negotiated all previous challenges.

**Pre-Suasion tactics**

Pre-suasion is an approach that has audiences becoming receptive to a message before they actually experience the message. Pre-suasion is about refocusing an audience’s attention just before requesting some relevant action, such as a hiring decision. It is the artful channeling of attention that can lead to strong persuasive and positive results. Here are three pre-suasive questions for your positioning weaponry. Note how they embrace a subtle future-forward assumption that you’ve already received the job offer.

1. **“What is your highest project priority and how do you envision my/our company’s involvement with it?”**

   This question is best asked of decision makers after they ask you, “Do you have any questions?” Most candidates respond with, “No.” WRONG ANSWER! Even if they don’t ask, volunteer toward the end of the interview by stating that you have a few questions. This question has that future-forward-leaning tone, with the implication to the decision maker that you already have the job and this interview is just a formality. Ask deeper-dive questions as

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\(^3\) *Pre-Suasion: A Revolutionary Way to Influence and Persuade* is a book by Dr. Robert Cialdini who writes that in order to change minds, you have to first change states of mind with pre-suasive tactics.
he or she explains details of the vision for your involvement on a project. The tone of the question also suggests to decision makers that you’re ready to get started immediately, and it reinforces that consultant’s attitude mentioned previously.

2. “What is your greatest need on the team, and how do you picture me/us adding value there first?”

Again, another question with a future-forward-leaning tone (and visual imagery) similar to the previous question, and it accomplishes the same mental goal: You already have the job and this interview is just a formality. This is a form of subtle persuasion as the conversation context now shifts from pre-hire information gathering to one where the decision maker is inserting your expertise into post-hire project work!

3. “Do you have any other questions or concerns I/we can address right now about how my/our expertise can help the team/department/company?”

This question reveals your interest in removing any concerns or objections before the interview ends. Sealing the deal means closing all the loops. You want to leave that decision maker with no unanswered questions or anxieties about your being THE best candidate for the position.

OPTIONAL QUESTION 4: “If you don’t have any other questions of me/us, is there any reason why we can’t have a conversation of starting salary and a start date?”

OK, definitely not for the faint of heart, but then again...you brought yourself (and the decision maker) this far, why not try to close the loop now and ask for the job? This approach is part of what I call extreme engagement for obvious reasons. We treat the idea of asking for a hiring decision like a taboo talking point because
we’ve been led to believe that the hiring decision is something that just takes time. It doesn’t; it’s the hiring process that takes time; the hiring decision usually occurs in a few seconds, and well before the end of the hiring process.

If a hiring team is involved, people may have a post-mortem discussion about all the candidate pros and cons, and then finally pick a winner days or weeks later, but it’s likely going to be a consensus of minds already made up. You can take the long, patient route, or you can take control of your career trajectory, take a chance on bypassing all that noise, and ask these questions as part of your Direct Engagement strategy. I can tell you from my experience and that of most veteran decision makers: We have a good idea before the interview is finished who we want to work with.

Let them know you’re thinking the same thing by asking these presuasive questions.

Donn LeVie Jr.
We’ve all dreaded answering the unanticipated interview question at one time or another. When you’re caught off guard or just aren’t prepared with a great answer, the tendency is to go with the first response that pops into your head. When that happens, that response usually does little to improve your chances for continuing in the hiring process.

Here are three responses to surprise-type questions that keep you on safe ground, put you back in control of the interview, and improve your odds for moving forward in the hiring process.

1. “What are your salary requirements?”

You may encounter a situation where you will be asked for a salary requirement during the initial job interview. If that happens, do not be the first party to toss out a number! You don’t want to be

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4 If you’re asked to provide a salary requirement in your cover letter, provide a range where your expected salary lies closer to the lower end of that range. Do not write that you are “flexible” or “negotiable.”
eliminated from further consideration based on some arbitrary number that flew out of your mouth.

While you should have a firm salary number in mind for your personal or family needs, continue asking questions to get a better idea if your number is within the salary range for the position, if that information has not been posted in the job announcement. Always ask for more than you want so that you can settle for what you need so you know how far you may safely extend those boundaries.

**Example Interview Where Salary Was Posted in Ad and Offer is Extended**

*Decision Maker:* “So, Jim…we’d like to extend an offer to you for the position.”

*Jim:* “I’d like to know if the posted salary of $83,500 for the position can be adjusted…I’m very interested in being part of the team but the posted salary doesn’t quite meet my requirements…”

*Decision Maker:* “What are those requirements?”

*Jim:* (Not wanting to kill the deal by blurting out a number): “Can you tell me what the salary range is for the position?”

*Decision Maker:* “It’s very competitive…”

*Jim:* “So the posted number represents a midpoint of the range? Low-point?”

*Decision Maker:* “Pretty close to midpoint, yes…”

*Jim:* “Given my expertise and proven ability to deliver results, I feel that a salary of $88,500 is more in line with what value my experience can bring to this team..”
Example Interview Where Salary Was Not Posted in Ad and Offer is Not Extended

*Decision Maker:* “Jim, I just have one more question …what are your salary requirements?”

*Jim:* “Before I can do that, I’d like to know the salary range for the posted position.”

*Decision Maker:* “It’s very competitive with offers for similar positions.”

*Jim:* “I’m sure it is, Mr. Decision Maker, but both of us need to know what that salary range is to move forward. I’d like to be considered for the position based on the how the benefits of my professional expertise will contribute to your efforts going forward better than any other candidate. If you’re convinced that I’m that candidate for the position, then extend an offer to me with a salary range and I can then provide you with a salary expectation.”

Yes, a bold response, but my approach to any career strategy is to always be in control of how you move forward from wherever you are in the hiring process and even after you’re hired. Every new day must be seen as an opportunity to move you to your next career goal.

2. “Are you interviewing anywhere else?”

Decision makers sometimes ask this question to gauge whether other companies are vying for your services. You can be truthful with a “yes” or “no,” but the follow-up question can be tricky: “Who specifically are you interviewing with?” If you are in charge of your career trajectory, you may not want to open the kimono that much. You can state that you’ve been asked to keep those names confidential (as you should).
These two questions could actually be good signs that the decision maker is interested in you; however, one possible response to this question is: “Well, would you be prepared to extend an offer now, because my response to your question depends on that answer.” That may sound a bit assertive or too forward for some, but it puts you more in control of the interview, which is a good spot to be.

I actually had a coaching client who provided that response in a job interview. The decision maker hesitated for a couple of seconds, smiled, and nodded his head (he’s thinking, “Ah! Touché!”), and came back with, “No, we aren’t prepared to make an offer yet.” My client replied (smiling in return): “Then I am in fact interviewing with one other company and moving forward in that process.”

“…and moving forward in that process.” Think about how that part of my client’s statement acts like a pebble in the decision maker’s shoe. The mere suggestion that this candidate is progressing in another company’s hiring process has the effect (only momentary, perhaps) of giving the hiring decision a degree of immediacy, maybe even expediting it to avoid losing my client to a competitor.

The decision maker could have also responded with, “Yes, I can extend an offer to you today.” My client’s directness (so some degree) may have accelerated that hiring decision as well as the decision maker’s fear of losing this highly qualified candidate to a competitor.

Does this approach work every time? There’s no way of knowing because metrics aren’t captured for it, but it does put you in more in charge of the interview—and your career.
3. “What would you say is your worst personal quality or habit?”

I’m not going to pull any punches here; I have never asked this question of a candidate and I advised managers who reported to me to do the same. This is a bush-league question from interviewers who don’t know how to properly vet candidates or simply had a list of questions written down for them. Think about it: Are you really going to confess a truth about your worst quality or habit to a perfect stranger—even if being truthful disqualifies you from the job? No one is that honest in this situation.

Decision makers are wise to disguised “bad qualities” responses such as, “Well, I tend to be an over-achiever…” or “I tend to push myself too hard until the job is done…” Avoid any similar response suggestions you may receive from coaches who don’t have any experience hiring people because these clichés and others like them are all too familiar to decision makers.

Here are two optional responses to get you out of that jam:

- “I believe that the question is best asked of anyone on my reference list because they will be able to provide an unbiased response.” (Smile while you say it, and as you say it, hand them that fine-tuned reference list; it shows you were prepared for that question.)

- If you have a solid assertiveness streak and can say it with a smile: “With all due respect, my worst personal quality or habit is something I share only with my spouse/my attorney/my parole officer.”

You can follow this with the first statement in the list here to help take any potential “sting” out of that remark. I’ve used this response in my career more than once without any negative effect. In fact, it does two things: it usually
generates a laugh from the decision maker (or at least a smile), and it reinforces your being an assertive, professional candidate who carefully couches all responses for keeping the shine on your brand (and for controlling the interview).

**Behavioral Interview Strategies**

**STAR Technique**

Most behavioral interview approaches begin with questions like, “Tell us about a time/project/circumstance you were involved with when...” or “Describe a situation where you had to...”. No worries here; just use the STAR structure to develop your response.

- **S** (Situation): Detail the background, provide a context. Where? When?+
- **T** (Task): Describe the challenge and expectations. What had to be done and why?
- **A** (Action): Elaborate on any specific actions on your part. What did you do and how did you do it? What techniques, tools, or processes did you use?
- **R** (Results): Explain the results, accomplishments, recognition, and quantify wherever possible (revenues generated, costs avoided, % process improvement)

Usually, there is no right or wrong response to a behavioral interview question; it is simply a way to determine how you (at the time) responded to a given situation and how well you can articulate it. Because hindsight is 20/20, if the results you report were less than successful, offer a brief post-mortem of possible corrective actions that may have helped the situation. §§§
Three important characteristics you need to be a presence-driven leader

Leadership presence is not like a suit you put on each day

Leadership is a hot topic today and training and development budgets worldwide will be increasing through 2024 to better develop leaders. According to C-Suite executives, the most sought-after skills for future leaders are soft skills, and of those soft skills, leadership presence tops the list.

Presence defies a one-size-fits-all definition, but someone with presence has been described as “a feeling that person radiates when others observe how he or she gracefully or seamlessly interacts with other people, other environments, and different incidents and occasions.”

There are universal principles at play in our everyday activities – at work, at home, at play – that allow us to be both influencers and be influenced; and be persuaders and be persuaded. Learning these principles can move you toward profound personal change and serve as a driving force for your individual and business success.

Indeed, the skillful application of these principles can create a distinct advantage to those who understand how to use them.
Four characteristics of leaders with presence

Over my 30-year career leading people and projects for Fortune 100 companies, I’ve identified four characteristics of leaders that exude presence: (1) They know how to engage others; (2) they know how to position their expertise and value; (3) they know how to use their expertise and value to influence decisions in their favor; and (4) they can easily convert other people to their side of an argument or their side of an issue. They know

Engagement, Positioning, and Influence are three important characteristics of presence-driven leaders that combine to Create allies, advocates, clients, customers, fans and followers.

Let’s briefly examine the strategy and specific tactics behind “engagementality and connectworking,” authority positioning, and social-proof influence that will elevate your leadership presence.

E.P.I.C. Results©

E=engage; P=Position; I=Influence, and C=Convert, Create, Comply, whatever fits your particular leadership role. This approach is effective in the work and home environment to “make
others want to do” what is required of them, to paraphrase Dale Carnegie. **Pre-Engagement** is used early in the phase; **Direct Engagement** occurs with face-to-face (or Zoom) to better position branded value and expertise; **Post-Engagement** is the application of social proof of branded value and expertise to influence a decision to convert/create/comply.

**Engagementality® and Connectworking®**

“Engagementality” is an attitude that embraces an active involvement in all phases of interpersonal communication and connection. The Presence-Driven Leader excels in engagementality. “Connectworking” is about providing value to others as a priority; traditional networking is typically a one-way street (“what can you do for me” mentality).

See Table 5 for a breakdown of the three engagement phases.

*Table 5. Different engagement stages.*

<table>
<thead>
<tr>
<th>ENGAGEMENT STAGE</th>
<th>APPROACHES USED</th>
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<tbody>
<tr>
<td><strong>PRE-ENGAGEMENT</strong></td>
<td>Mold Their Perception via Social Media</td>
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<td></td>
<td>Elicit &amp; Align Congruent Attitudes via Social Media</td>
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<tr>
<td></td>
<td>Trigger Social Pressure to Engage</td>
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<tr>
<td></td>
<td>“Habitate” Your Message (Repeated Exposure)</td>
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<tr>
<td><strong>DIRECT ENGAGEMENT</strong></td>
<td>Optimize (Position) Your Message</td>
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<td></td>
<td>Drive Their Momentum</td>
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<tr>
<td><strong>POST-ENGAGEMENT</strong></td>
<td>Sustain Their Compliance through Influence</td>
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</table>
**Authority positioning**

Authority positioning happens during Direct Engagement, when you are furthering the rapport, familiarity, and boosting your “likeability” with other decision makers. It’s money in the bank. You position your authority by the questions you ask. You already come in with some status and “currency” based on how well you pre-engaged those decision makers.

Figure 2 shows seven stages of authority positioning that help communicate your leadership platform and leadership brand equity. You are setting the stage to “pre-suade” (set up the conditions in the minds of) decision makers to be receptive to your offering prior to your opportunity to ask YOUR questions. Ask questions such as: “What’s your top priority project and how do you envision us working together on it?”

<table>
<thead>
<tr>
<th>CLARIFY</th>
<th>Discover Your Emotional Assignment</th>
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<tbody>
<tr>
<td>COMMIT</td>
<td>The Non-Negotiable Promise of Excellence</td>
</tr>
<tr>
<td>COLLABORATE</td>
<td>Promote Your Brand One Conversation at a Time</td>
</tr>
<tr>
<td>CONNECT</td>
<td>Create the Authentic Emotional Link</td>
</tr>
<tr>
<td>COMPETE</td>
<td>What Makes You So Special?</td>
</tr>
<tr>
<td>COMMUNICATE</td>
<td>“Talking Your Walk” to Influence and Inspire</td>
</tr>
<tr>
<td>CONTRIBUTE</td>
<td>If Not You, Then WHO?</td>
</tr>
</tbody>
</table>

*Figure 2. Seven stages of authority positioning.*
Responses force the decision maker to *describe a scenario where you are already working on his or her top priority project with your expertise*. That’s planting a seed in memory that returns time and again with recall, and places you top of mind, especially when it times to extend an offer.

**Social proof of influence**

We know from many studies that when people are uncertain, they seek out actions of others to guide their own actions. That’s why we read reviews of movies, restaurants, vacation spots. It’s faster and easier to rely on the opinions of others who have previous experience with our planned actions than have to personally investigate the many variables to determine what to watch, where to eat, and where to stay when travelling. More often than not, social proof is our friend rather than our foe; however, follow former President Reagan’s advice to “trust but verify” these short cuts when in doubt.

The following list of social proof examples are considered “weapons of influence” because we use them to persuade potential decision makers, clients, customers and others (relying on the opinions of others who have previous experience with our products or services) of our branded value and expertise.

- LinkedIn endorsements
- Client/customer testimonials
- Awards and honors
- Book cover blurbs
- Articles in professional journals
- Quantified achievements
Why does this work?

There are three very simple reasons why these techniques work:

1. Because of the brain’s capacity to create associations and strengthen them with repeated exposure... THAT creates familiarity, which leads to trust, which leads to access, which leads to brand preference, conversion, compliance

2. Because of the human preference to be around people we like

3. Because of the human preference to be around people like us

Leadership presence is not like a suit that you put on in the morning and take off at the end of the day. Not everyone has the same inherent gift for strong leadership presence, but we can enhance what we have been blessed with.
Ditch the elevator pitch!

Use persuasion language instead for better results

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If you’ve ever worked in a marketing or sales capacity or hung out with people who do, chances are you’ve heard the term “value proposition” a few dozen times. A value proposition can be thought of as a 30-second “elevator pitch” (actually, you’ll likely deliver a value proposition at a networking event, an evening reception, or cocktail party, but rarely in an elevator).

Or it can be thought of as that back-of-the-business card statement that testifies to you or your business offering products or services decision makers need. A great value proposition anticipates the tangible, functional reasons, questions, or objections decision makers have for hiring or buying:

- What does your solution/expertise mean for me?
- Why should I buy this product/service or hire you over all others being considered?
- Why should I buy from/hire you?

When your unique selling proposition/value proposition can preemptively address these three important decision-maker questions, you have engaged in what I call “thunder stealing” which is basically removing upfront these three very common objections.
The problem with many value propositions and elevator pitches

Unfortunately, many value propositions are encased in verbiage that usually doesn’t invite conversations with potential clients or customers. These statements are all too often dead-end sounding and a bit self-serving that many times fail to encourage follow-up dialogue from interested parties. What may remedy such a conversation stand-still is the use of persuasion language and a technique called a lead-in setup.

Now, a good value proposition identifies who your target audience is; your product or service; the business category or sectors you serve; the functional, symbolic, or experiential benefits others receive; and reasons to believe the value in your proposition.

The one question you must get the other party to ask…

A great way to grab the attention of another party is to create a lead-in setup that steals their thunder and always has decision makers asking: “How do you do that?” which then sets up the opportunity to convey the value your service or product delivers.

A solid value proposition consists of several key variables such as target audience, product/service offering, type of benefits provided, reasons to believe the value proposition, and the target audience needs.

But you can’t just blurt out all that information because chances are, you will bore to tears the other party and it doesn’t lead to a conversation with the person who asked, “What is that you do?”

In fact, the best way to convey this information is to first preface it with a lead-in setup statement that triggers a decision maker, hiring manager, potential client to continue the conversation by them...
asking: “How do you do that?” That’s the **Golden Question** that opens many doors of opportunity. It’s the bait on the hook that gets them to bite.

After being asked “What do you do?” by a prospective client or customer, an example lead-in setup statement that would beg the follow-up question, “How do you do that?” and might sound something like: “We help corporate executives stay out of jail…” They can’t help but then ask, “How do you do that?”

Here’s a real example of how I use the power of persuasion language for a lead-in setup statement that not only invited dialogue but had decision makers leading me to my value proposition, and then to a business relationship.

**Example of a winning value proposition**

In late December of 2017, I was a guest of a guest for a client appreciation weekend over New Years in Las Vegas, courtesy of one of the large casino resorts. During one afternoon activity, members of the casino resort C-suite came out to meet our small group. I met one of the vice-presidents and after exchanging greetings and some small talk, he asked me: “Donn, what is it that you do?”

I responded with my carefully crafted lead-in setup: “Corporate executives just like you hire me to help them get heard, get noticed, and get epic results…”

He smiled and followed up with the Golden Question: “How do you do that?”

It was only after I set the hook that I responded with my value positioning statement: “My corporate programs and virtual strategic mentoring programs help leaders and executives lead
smarter, act faster, and make breakthrough decisions using Intelligent Influence....”

The vice-president’s comeback was a wide-eyed stare and momentary pause. He then called over other C-suite members, turned to me and said, “Donn...tell them *exactly* what you told me...” and that’s when the conversation turned into a group discussion. I immediately followed up by asking them questions to determine their organization’s needs and issues; what’s worked for them in the past and what hasn’t.

My objective was to see how and where I could help, *not* sell them one of my programs. I came off looking like a problem solver, not a peddler of services. To keep my name top of mind, I sent those C-suite members signed copies of my award-winning books when I returned home.

By simply asking questions and answering theirs, I never let objections make it into the conversation. I stole their thunder.

The *same* situation occurred the next evening over dinner with a different group of directors and vice-presidents from another large casino resort. I happened to be seated next to the associate vice-president of sales, and again, I was asked the *same* questions, I provided the *same* responses, and I enjoyed the *same* result. They too received signed copies of my books.

**Example lead-in setup and value statement for job interview**

Let’s look at a lead-in setup and value statement for someone interviewing for a position with a company.

*(Hiring manager/decision maker): “So, tell me Jim...why should we bring you on board?”*
(Jim’s lead-in setup): “Decision makers hire me because of the future benefits my proven problem-solving expertise will bring to the strategic objectives of the organization.”

(Hiring manager/decision maker): “How do you do that?”

(Jim’s value statement): “My achievements in loss prevention demonstrate my expertise with not only recovering more than $X in revenues, but that knowledge and skillset will contribute to the ongoing business goals of your enterprise…from Day 1. Let me ask you this: What would be your highest priority project where my expertise can help?”

Jim lays out his setup lead-in, value statement, and ties it in with suggesting to the hiring manager that he’s the only logical candidate to receive a job offer with his question. Jim doesn’t leave anything to chance or dead air as he probes the hiring manager with more questions that further reveal his expertise as a value-add problem solver, and not just another candidate looking for a job.

Example lead-in setup and value statement for client/customer acquisition

Here’s an example using a lead-in setup and value statement for someone representing a security company seeking a new customer or client.

(Decision maker): “Tell me something about your company, Diane.”

(Diane’s lead-in setup): “Mr. Jones, those Big Box retailers hire us to help them sleep better at night…”

(Decision maker): “How exactly do you do that?”

(Diane’s value statement): “Our wireless HD micro-camera security system is not only the most preferred electronic surveillance device
in the retail industry, but it also gives you **worry-free security assurance** with impenetrable 100 percent uptime thanks to triple-redundant backup hard drives, and **24/7/365 support** that includes fraud investigation support. *What is your most pressing security issue that’s keeping you up at night? I can show you how we can help eliminate that concern…”*

Diane takes the same approach as Jim does in the previous example by presenting herself and her company as a problem solver, not a peddler of electronic surveillance equipment. She knows the pain point of the decision maker: Worrying (“losing sleep”) about fraud and preventing revenue loss.

**Optimal “pre-suasion” leads to optimal “persuasion”**

The techniques involving a lead-in setup to the value statement are what author and social psychologist Robert Cialdini calls *optimal pre-suasion*. Audiences become receptive to, or become more interested in, a message before they experience it (what Cialdini calls capitalizing on “privileged moments for change” in his book, *Pre-Suasion*). Changing minds involves first changing *states of mind*. The secret doesn’t lie with the value statement itself so much, but in the key moment — the set-up moment — *before* that value statement is delivered.

What that means for individuals or your business is that while the creation of a solid value statement is a priority, it’s not the most important element. You first have to bring the decision maker to the threshold of it by using the lead-in setup statement. Arranging for a decision maker to be receptive to a specific message or move in a preferred direction before that message is communicated is critical. Whether you call it a *lead-in setup statement*, *reframing the context*, or simply an *opener*, it serves two purposes: (1) It is a
starting point for persuasion, and (2) it mitigates or removes objections, obstacles, and barriers to acceptance.

**Lead-in setup and value statement scripts you can use**

Here’s a lead-in setup and value statement template you can use or modify:

For *(target audience)*, my/our *(product or service)* is the *(category)* that provides *(functional, symbolic, or experiential benefits)* because *(reasons to believe the value in the statement)* resulting in *(the target audience needs, goals, wants, desires, outcomes)*.

I/We help *(target audience)* eliminate/grow/increase/build/remove/prevent *(some desired outcome)* that helps them *(achieve some goal)* so they can *(accomplish some result)*.

The lead-in setup should not be a statement that can stand by itself; it must be worked in such a way that encourages the follow-up question: “How do you do that?” from the other party.

**How I use setup and value statements**

“*What do you do?*”

(Me): “I show fast-track leaders how to build an unfair advantage in the marketplace.”

“How do you do that?”

(Me): “As a positioning and influence strategist, my programs reveal influential and persuasive techniques that help leaders gain new allies, advocates, champions, clients, customers…”

Here’s another example I’ve used before:
“What do you do?”

“Companies hire me to rehabilitate ineffective leaders…”

“How do you do that?”

“As a leadership influence strategist, I show leaders how to build strong leadership platforms for an empowered work environment that results in higher employee engagement and greater productivity…”

Actual client examples

One client had a hard time with this exercise. When I repeatedly asked her “what do you do?” she responded with either her job title (“I’m a bank fraud examiner”) or some phrase from her job description that didn’t communicate the value she provided.

Finally, I asked her to assume that I had no idea what a bank fraud examiner did, and she finally hit on it: “I keep bad guys away from other people’s money…”

Then I asked her, “Well, how do you do THAT?” and her positioning statement was perfect as it addressed the emotional concerns bank customers have: “As a bank fraud examiner, I not only provide customers with account security, but I also see to it that they have peace of mind that their money is safe.”

Jim is a corporate security consultant — that’s what he tells people when they ask him what kind of work he does. After working with Jim for a few minutes (he was a quick study), he came up with this great setup statement: “I keep clients off the front page, keep executives alive and out of jail, and make suppliers accountable…”

I had no choice but to follow up with: “Wow…how do you do THAT?” After a few minutes of tweaking his positioning
statement, we came up with: “Domestic and international clients want my converged security expertise that integrates fraud prevention and deterrence as well as physical, personal, and cybersecurity applications that offer full-circle protective measures.”

Who wouldn’t want to know about how Jim could help them with that focused positioning statement?

You get bonus points if you follow up your positioning statement with this conversation extender: “If you’d like to know more, I’d be happy to set up a call or meeting to show you how I can work with your organization to help you <avoid some pain, eliminate fear of loss>.”

My friend Ryan Foland who is a branding expert sums up the importance of getting others to ask questions that lead to constructive conversations:

“At the end of the day, it’s understanding that the more you talk, the less people listen. And the less you talk, the more people ask questions. And when people ask questions, it turns into conversation. Conversation creates curiosity, and curiosity is what will help you influence and persuade decision makers.”

The purpose behind this approach is to create engagement and interest — perhaps even a connection for future opportunities for either or both. §§§
Donn LeVie Jr.
Most people don’t want to be stuck in obscurity in their profession. They want to be recognized and compensated for the value they bring to an organization, clients, and customers. Building a reputation or professional brand as an influencer in your anti-fraud field requires a portfolio of knowledge that’s more focused from that of an “expert.”

**Building on the “Big Idea”**

The transition from expert to influencer begins by recognizing a knowledge gap or even an authority gap in your particular professional specialty. Those are opportunities waiting for someone to fill those voids with their unique perspective, knowledge, and experience that result in the creation of the “Big Idea.” You have to learn how to push forward, promote, and distribute your “Big Idea” in different ways that push you beyond expert status and into influencer standing.

Labels such as “influencer” and “thought leader” are often easily embraced by experts who may have written a book, perhaps given a TEDx talk or conference presentations, or have one million followers on Twitter. In truth, it’s not that easy to truly be considered an influencer or thought leader by others. Those are
labels of distinction others call you when the elements of your influence or thought leadership have reached critical mass in your profession, field, or industry.

“Influencer” and “thought leader” are titles others give you

In the “Influencer and Thought Leader Masterclass for Executives” corporate program I teach, I ask attendees the following question in two ways: “How many of you consider yourselves to be influencers or thought leaders in your profession?” Only once has anyone raised their hand (and it was just one person).

However, when I ask the question differently: “How many of you have been called by others influencers or thought leaders in your profession?” a few more hands will go up. That second question is based on the opinions of others, usually people they work with, or who are familiar with their reputation in the profession. At that point, I ask: “Do you know by what criteria they base that on?” That question gets people to think: “Hmmm…do people say that about me because of my position or title, or have they recognized where my Big Idea has generated a microshift in my profession, field, or industry?”

Most of us realize we don’t self-proclaim such titles for two reasons: (1) Having a deep personal sense of humility; and (2) the realization that you have more “currency” (standing within the community) as an influencer or thought leader when others refer to you in those terms, not when you refer to yourself as such. (You can scatter a crowd at a cocktail party with misplaced humility by referring to yourself as a “member of the Mensa Society by one point.”)

Let’s look at five techniques that can elevate your status from expert to influencer — and maybe on your way to the next level: “thought leader” status.
1. **Are you an advocate or an opponent of key issues in your field or profession?**

Every issue has two opposing positions: the advocate and the contrarian. Pick one you have a strong belief and commitment to and run with it farther than anyone else. If you’re an advocate for some key issue, your voice must elevate the issue above its current standing with the status quo; otherwise, you’re just one of many thousands of voices all saying or agreeing to the same thing.

If you take a contrarian position because you see flawed thinking or erroneous assumptions, your arguments must be sufficiently cogent and convincing against an issue for them to devalue its importance.

Regardless of the position you take, if it’s well-reasoned and clearly articulated, it can become your Big Idea. It can become the message no one’s heard before. As someone once told me, a “great idea is one that people will write a check for.”

2. **Can you depict your Big Idea/concept graphically so others can quickly grasp the overall notion?**

A picture is worth a thousand words, as the saying goes, and nowhere is it more applicable than with communicating the essence behind your Big Idea. Because vision trumps all the senses, the eyes are the gateway to reasoning and evaluation of your position or concept. If you can’t picture your concept, neither can others.

If you can graphically illustrate your concept so others can quickly grasp the overall context of it, you have planted a seed. Image or pattern recognition is easier on the brain than recall because recognition relies on context.
Figure 6 shows two ways of communicating how to escape a rip current. Compare recall (pulling from memory) with the simplicity of image recognition and context. The important information transmitted through context occurs nearly instantaneously, which is a good thing when you have to escape a rip current. Or you can try to recall the numbered list in the midst of panic.

![HOW TO ESCAPE A RIP CURRENT](image)

**Figure 6. Information recall vs. information context: which is faster?**

3. Can you craft a metaphor or simile that captures the essence of your Big Idea?

The verbal picture-painting characteristics of metaphor and simile provide flashes of insight for others to grasp the equivalency of your concept. A metaphor is a figure of speech that communicates how your Big Idea is something else. The simile as well is a figure of speech that aligns your concept with a different but parallel concept using the words “as” or “like.” Here are examples of both that I use in my programs and materials:

- **Metaphor:** “Influential and persuasive intelligence is the pathway that takes emotional intelligence to new levels.”

- **Simile:** “Describing the concept of leadership presence is like trying to describe a summer breeze; you can only see the effect it has on things it encounters as it moves through the surroundings.”
4. Can you re-spin a famous quote or create your own quote that captures your Big Idea?

When it comes to quotations, there are those who borrow from the remarkable lives of others, and then there are those who live remarkable lives others quote from (sorry, that’s taken—by me). Anyone can post a quote on LinkedIn or Facebook from some famous person (that’s called “thought repeating” and there’s too much of that on social media), but what are you doing to create your own memorable bits of wisdom?

Influencers are quoted more often than experts and thought leaders more often than influencers. Influencers (and thought leaders) use their quips or their own take on well-known quotes in their domain to reinforce their advocacy or contrarian position.

Start by gathering quotations from all sources that relate to your Big Idea. Next, begin replacing key words in the quotations you’ve identified until you create a new direction of thought.

Here’s a quote that embraces a contrarian perspective from Ralph Waldo Emerson that has application to leadership development:

“Do not go where the path may lead; go instead where there is no path and leave a trail.”

Next, begin substituting words with different ones. Here are 5 different versions of the same idea of Emerson’s:

“Don’t follow where the crowd may lead; go instead where there is no one and forge a new direction.”
“Don’t follow from behind as the view is not flattering; instead lead from the front where your vista is unrestricted.”

“The beaten path is congested with followers; elect to create a new route that others so inclined may tread as well.”

“The problem with the beaten path is that it is littered with the beaten; instead, a new trail lies undiscovered awaiting your journey.”

5. **Have you developed different ways and channels to distribute your intellectual property?**

To go from expert-to-influencer status requires the development of your Big Idea into different forms and formats of intellectual property (books, white papers, journal articles, LinkedIn articles, videos, TEDx talks, conference keynotes or presentations, speeches, seminars, blogs, podcasts, etc.) for distributing the value-rich, paradigm-shifting content you are creating for which others have a need.

If you work in the private sector, your employer may have restrictions on what you can and can’t develop as your intellectual property. It’s even more restricted for those working in the public sector, especially for using social media as distribution channels for creative works (and perhaps, who actually “owns” it). Unfortunately, these restrictions lead to a “digital footprint” void or invisible social media presence and are major impediments for public sector employees who seek to transition to private sector jobs.
“Big Ideas” move the needle for others

There are different scales of influence whereby the “influence of that influence” can change a company’s roadmap, one individual’s path to personal and professional success, or extract a confession from a suspected fraudster.

Your Big Idea just has to be big enough to effect some change that radiates through people’s lives directly or indirectly.
Donn LeVie Jr.
Moneyball leadership
Rethinking how we get corporate leaders
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Leadership is part art, part science and perhaps a little bit of alchemy. The task of selecting individuals to lead companies has become more complex for boards of directors as the CEO’s role must address the interests of all stakeholders—not just that of shareholders—to provide value to all. That typically means taking a long view of financial results and increased focused scrutiny on putting the right person at the organizational helm.

“Old school” C-suite executive recruitment failures have been in the headlines a lot lately.

It seems the higher one climbs, the harder it may be for some to maintain an ethical grip on things. Boards invest a lot of time and money recruiting executive leaders with the hope they can set a vision, take them to higher revenues, and boost shareholder value.

Sometimes those hires backfire.

The passage of the Sarbanes-Oxley legislation in 2002 tightened corporate governance by prohibiting CEOs from loading boards with friends and associates. But legislation and corporate policy can’t prevent human behavior subtleties from intervening.
Bias in board decision making

Understanding decision-making bias means looking at human nature. A problem plaguing boards of directors when addressing a “problem” CEO or a non-performing one is a type of confirmation bias called choice-supportive bias. We as humans have this tendency to stick to a bad choice, even as a situation worsens.

Choice-supportive bias is a self-preservation mechanism that, unfortunately, can strengthen a board’s resolve if it chooses to stand by a failing CEO. Choosing not to do so would jeopardize their individual and collective sense of self. In such situations, the tendency of board members is to recall the positive accomplishments of a CEO’s tenure while hoping the fire in the boardroom extinguishes itself.

We all would like to think that despite having strong beliefs or opinions about some issue, we would be swayed by facts that challenge those beliefs and adjust our thinking accordingly. Not so, as contemporary politics reveals. Our beliefs get stronger when our deepest convictions are disputed by contradictory evidence, which suggests our brains prefer to set aside critical thinking in favor of our faulty position or belief.

The problem can be compounded further when CEOs and other C-suite executives are brought in from outside the organization without the appropriate level of due diligence.

Risks from hiring outside the organization

In his seminal book, Governance, Risk Management, and Compliance, Richard Steinberg mentions a twenty-year study of S&P 500 non-financial companies where companies that appointed internal
candidates to the CEO position “significantly outperformed those that bring outsiders to the job.”

The study also revealed that the cost of attracting an external candidate was much higher—by as much as 65 percent—than for internal CEO hires. Four in ten CEOs recruited from the outside leave the company after two years and nearly two-thirds exit by their fourth year, with golden parachutes easing the descent.

There’s still debate about promoting CEOs internally or going outside the organization. If an organization needs a turnaround specialist or crisis management expert at the helm, the board may search the open market for a likely candidate with those unique skills and experience.

But the game of baseball offers an interesting parallel to the discussion.

**Let’s talk baseball for a minute**

Board members who opt to hire a CEO from outside the organization should read Michael Lewis’ book, *Moneyball*, or see the Brad Pitt movie of the same name. For those who haven’t seen the movie or read the book, “Moneyball” relates the story of an Oakland A’s baseball team that exploited—*disrupted* is a better descriptor—industry market inefficiencies, overcame the loss of several superstar players, and then had one of the best seven-year runs in franchise history.

What the A’s did was trade the idea of a team loaded with superstar athletes for one that focused on building the existing roster of lesser-known talent that had balance, depth off the bench, and player versatility (playing more than one position well).
The Boston Red Sox and Houston Astros followed the same strategy, and each won World Series championships (even though the Astros were later caught cheating by stealing signs to pitchers during 2017 season and post-season playoffs in which they won the World Series; the Red Sox did the same in the 2018 season, but not during the World Series).

**Bringing talent up through the ranks**

Baseball teams have learned to develop their own talent; they bring them up through the minor league organization, so they learn that particular system, work with team coaches, work as a unit with their teammates, and improve the more technical aspects of their skill and game knowledge. Of the top 3 sports (football and basketball being the other two), only baseball relies more heavily on a team effort than individual player effort.

For example, the NBA Cleveland Cavaliers without LeBron James didn’t qualify for the NBA playoffs between 2002 and 2011. However, when James did join the team, they made it to their conference semi-finals three times, to the NBA Finals five times, won the NBA Championship once, and did not qualify at only two times between 2003-2010 and 2014-2018. While superstar power sells tickets and number 23 jerseys, the organization failed to develop any depth elsewhere on the team.

Baseball teams, more importantly, mature in a more structured environment and are mentored to better handle the fame, fortune, and distractions that the bright lights the big league offers. Individual players function better as a cohesive team rather than relying on the one or two home-run sluggers or the pitching ace throwing physics-defying sliders and curve balls at helpless hitters.
The baseball analogy works well here for paralleling what happens when some organizations go outside their own corporate walls to bring in the superstar C-suite executive. In “Moneyball,” author Lewis relates the relationship of “insiders” vs. “outsiders” and the ever-increasing capitalist demands of market efficiencies—to which professional baseball is not immune.

The analogy doesn’t work nearly as well for pro basketball or football because they don’t have established “farm” systems that groom young talent. College hoops and college football aren't the NBA or the NFL (theoretically), though in 2004, the NBA formally structured summer leagues (which had been around for decades, informally) to acclimate rookies into the atmosphere of the pro game.

In the NFL and many other sports, once a player gets drafted, that player is in a new environment with new coaches, a new system, new culture, new teammates, and so on, and often tossed into an on-the-job training environment for dealing with situations on and off the field.

When you put up a big chunk of your revenue to sign a superstar player (i.e., executive), it can backfire in a huge way. There’s no depth for that position on the bench. That player/executive can be out for the season with an injury, or with a terminal illness or having been handed a federal indictment; can’t settle in with the new team system (the corporate culture; governance compliance); or generally creates turmoil in the clubhouse (or the boardroom).

“Moneyball” leadership: Where global leadership development is going

According to the market research report summary by Technavio, the global corporate leadership training market is expected to post
a compound annual growth rate (CAGR) of nearly 15% during the forecast period. Organizations are increasingly spending on leadership training year over year, as it is more cost-effective for a company to fill senior positions from within its hierarchy than hire an external resource, as has been noted Technavio’s research.

That’s what I call “Moneyball Leadership” (see Figure 4); it’s building depth; it’s creating engaging relationships at all levels over time, and it strengthens positive influence throughout the organization. In addition, companies are fast recognizing leadership succession training as essential to a company’s efficient functioning and financial health.

All is not rosy, however. In one segment of the DDI Frontline Leader Project that involved more than 1,000 leaders and executives, only one in ten wants a seat in the C-suite; just 34 percent of managers would like to move up one level into an operational leadership position; and 11 percent have no interest in

![Figure 4. Old school CEO hire vs. Moneyball internal leadership hire.](image-url)
steering the ship (CEO position) whatsoever. It is critical that organizations recognize high potentials earlier in their leadership development process, prioritize their growth into those ever-expanding roles, and identify select candidates for leadership succession.

**Batter up!**

To apply the Moneyball Leadership model, identify the internal talent, teach them the system, grow them into leaders who understand the people, the culture, and the processes within the organization. Ensure they understand that building connections with others takes precedence over claiming authority over them. People can't have faith in you without belief and trust in who you are. Take the time to bring up your own Triple-A talent so they can more easily put together consecutive winning fiscal seasons rather than using the Wall Street scorecard of quarter-by-quarter (the equivalent of inning-by-inning) results.

After all, it doesn’t matter who’s ahead at the seventh-inning stretch; what matters is who’s winning at the end of the game. §§§
Donn LeVie Jr.
Crisis leadership in the midst of chaos

Crisis leadership is different from everyday leadership

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In normal circumstances, leadership can sometimes be thought of as the daily management of micro-crisis incidents. Issues and problems often get resolved quickly or are delegated to others for resolution. However, in larger moments, such as war, natural disasters, or pandemics, crisis leadership demands the expression of a unifying vision of mythic proportions as the effort by all affected must be focused on returning everyday life to a sense of normalcy sooner than later.

Let there be no mistake: crisis leadership requires intense focus and a commitment to action to affect necessary interventions that eliminate the fear, uncertainty, and chaos that have descended upon society.

The Coronavirus pandemic created an atmosphere of uncertainty, confusion, and panic among citizens of the world. As leaders of nations and corporations attempted to sort out priorities to protect people, the public health system, and the global economy, they had to embrace a singular charge of their office at the time: bringing everything back to “normal.”
Crisis leadership involves different approaches

Crisis leadership differs from the everyday form of leadership (such as visionary leadership and reform leadership) in many respects, particularly the sudden threat to prioritized goals and objectives. When life, liberty, or property are in jeopardy, all other considerations become secondary. Besides focusing on the logistical and material needs of those affected by such Black Swan events (events that are characterized by their extreme rarity, their severe impact, and the widespread insistence they were obvious in hindsight), leaders are often elevated in stature and status by people who may feel helpless, confused, and lost as they turn to them for assurance.

In such times, leaders invoke powerful rhetorical messaging to help bring some sense of stability, balance, and control to those affected. Such instances give rise to what’s called charismatic leadership, also referred to as crisis-response leadership. Let’s explore the attributes and circumstances of charismatic/crisis-response leadership that you may find helpful when the unexpected, improbable, or catastrophic shows up in your environment.

Charismatic/crisis response leadership

“Charisma” is derived from the Greek word for “gift” and was used in the early Christian church to describe individual gifts of healing and prophecy. The term was later expanded and secularized to describe “any leader who derives his or her power from particularly exceptional personal traits.”

Research suggests that an extraordinary circumstance can serve as the antecedent crucible from which your innate charismatic
leadership “presence” can emerge as a crisis-response. It’s an interaction that’s primed by influential rhetoric and persuasive speech delivery which occurs between you (the leader) and others (employees, supporters, followers, population) during or immediately after a crisis to align with the necessary commitments, sacrifices, and courage to overcome the challenge.

Walt Manning, CFE and CEO of the Techno-Crime Institute states that, “Not only is there a need for a charismatic leader to effectively direct the crisis response, it’s also important to have the right person in that role.”

One frequently cited and dissected example of this charismatic/crisis-response leadership style is that of former President George W. Bush before and after the 9/11 terrorist attacks. In the wake of his rallying the country, his popularity soared to record levels. Speeches by Churchill and FDR before and after World War II have likewise been analyzed with software to determine levels of charismatic/crisis-response leadership and how long favorability ratings endured in post-crisis scenarios.

Elements of charismatic/crisis-response leadership

Here are a few factors that influence your charismatic/crisis-response leadership style:

- Articulating a strong—perhaps even radical—vision and mission that others can tie their self-esteem and sense of self-control to
- Sharing your values, objectives and vision so that others can internalize them
- Embracing a strong personal ethical and moral commitment to those stated values, objectives, and vision
• Others’ willingness to set aside personal self-interest during the crisis for the sake of the greater population need

**Linguistic tools for charismatic/crisis-response leadership**

Influence and persuasion strategies play a significant role in creating the allure of charismatic/crisis-response leaders. In that vein, your use of rhetorical devices (linguistic “tools” that use a specific sentence structure to evoke audience reaction) form the foundation for generating an emotionally focused appeal that the masses will (hopefully) embrace. The philosopher Plato referred to the study of rhetoric as “the art of ruling the minds of men” and that’s accomplished with language, influence, and persuasion.

There are 17 different rhetoric tools at your disposal that fall into four categories all prominent charismatic/crisis-response leaders have used to deliver message of mass appeal

• **Logos**: use of logic to convince or persuade; includes use of statistics, facts, statements of authorities.

• **Pathos**: appealing to emotion to further advance prescribed actions, attitudes, or behaviors.

• **Ethos**: ethical appeals for persuading others that the speaker and the cause are just, serious, and necessary to affect the arduous task(s) that lie ahead.

• **Kairos**: related to the timing of a prescribed course of action or idea where historical relevance, consequence, and significance forms an important part of the argument.

For example, as a charismatic/crisis-response leader who must appeal to a group’s sense of collective identity during and after a
catastrophe, you would likely incorporate these rhetoric strategies in your speech:

- Make references to history and tradition as a binding agent to establish a sense of community
- Use narratives (stories) that emphasize that collective identity
- Reinforce the shared collective values to further unify
- Focus on your similarity to those in the group (“We’re all in this together…”)
- Highlight shared values and moral justifications to undertake necessary political, legal, or social actions
- Repeat calls for maintaining hope and faith going forward
- Appeal to the group’s self-worth, which forms the basis of our very thoughts, feelings, and behaviors, all of which can become paralyzing during a crisis. Upholding the group self-worth is critical to the forward collective momentum.

Here’s an example: the daily Coronavirus task force briefings all contain elements of statistics, facts, and authority statements (logos); emotional pleas from authority figures to shelter in place, wear masks, practice social distancing (pathos); public appeals from authority figures conveying that severe measures being undertaken are just, serious, and necessary to affect the “flattening of the curve” (ethos); and that now is the time to take the necessary action to thwart this historic pandemic (kairos).
Charismatic/crisis-reform leadership vs visionary/reform leadership

The leadership approaches for combating and overcoming crisis often require extreme measures and intense focus. During times of extended threats, high uncertainty, and multi-faceted disruptions, many decisions must be made quickly, unilaterally, and with just-in-time input from others on a “need to know” basis.

Charismatic/crisis-response leadership often must bypass, amend or suspend traditional policies and procedures. Federal emergencies must do the same while remaining under the guidance of constitutional foundations. This type of leadership is one that is not treated lightly nor is it an approach used for any situation but the most severe of crises.

Crisis, calamity, and catastrophe make little room for any other type of leadership style at the helm other than charismatic/crisis-response. The hierarchical top-down command structure in government and corporations works well in times of crisis—to a point. As a crisis-management task force tackles its respective responsibilities and logistics, the command-and-control approach of charismatic/crisis-response must yield some of that leadership to those coordinating efforts along the front lines (the current Coronavirus Task Force is a good example of leadership delegation). They become crisis-response implementors where rapid, immediate execution of strategy is the priority.

Visionary, or reform, leadership often is present with crisis-response leadership efforts. Reform leadership involves different actors, actions, and agendas, typically demands listening to multilateral perspectives, participating in lengthy discussions, and back-and-forth compromise.
Visionary/reform leadership, while valuable for ushering in new capital projects, acquisitions, or initiatives, has a major drawback for addressing catastrophic events: such future-forward policies and thinking create challenges for focusing on the immediate crisis on everyone’s doorstep.

Walt Manning again offers a poignant perspective:

> During a crisis, there’s usually not time for debate or for pursuing other agendas. It’s a time that requires comprehensive, decisive, and coordinated action with everyone pulling toward the same goal. Otherwise, you have a high possibility of disaster.

Conflating charismatic/crisis-response leadership efforts with visionary/reform leadership dilutes or delays the actions needed to implement emergency stopgap measures to counter what catastrophe leaves in its wake. While some immediate and autonomous reform may be inevitable during crisis, it is in the crisis-response leader’s best interest to consult with vested stakeholders for their support before any extreme measures need be considered.

There’s a time and place for visionary/reform leadership; it’s just not when trying to deal with a crisis, as former ACFE Regent and retired Lt. Col. Robert Blair relates:

> One of my mentors from 25 years in uniform was the 37th Vice Chief of Staff of the Air Force, General Larry Spencer. Coming from the financial comptroller community, he taught us when we make a priority of taking care of the member’s pay meant to ease his concerns about his family. That freed his mind to focus on the battle in front of him.
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*Take care of your people and they’ll take care of you. That’s just Leadership 101.*

In other words, leaders shouldn’t try to reform their way out of a crisis. Crisis-response leadership cannot afford the posturing that reform leadership entails. §§§
What’s your leadership C4Q?
Curiosity, creativity, critical thinking, collaboration quotient

First published July/August 2021

During the Industrial Revolution, fear was used as a motivator to keep worker output high as they performed tedious, repetitive tasks daily in dreadful factory and foundry working conditions. Overseers used fear as a psychological instrument to maintain worker focus to do only what they were told, in part to maintain the company’s profitability. There were no “suggestion boxes” on the factory or foundry floor because new ideas simply had no place in such oppressive, autocratic environments.

Fear as a motivator stifles curiosity, innovation

There was a time when fear as the dominant motivator gave way to extrinsic employee rewards, such as pay raises, promotions, more sick leave. Not that extrinsic rewards are no longer a viable influence; however, they remain a form of fear incentive because of the anxiety of loss (losing a raise, promotion, or a job) associated with them. Only in recent decades have we learned that people want to be appreciated for the work they do and allowed the freedom to do their best on the job. We’ve also learned that toxic work environments and toxic manager relationships with employees undermine employee engagement, confidence, and commitment.
According to many sources, a bad boss is also the number one reason why employees quit their job. There’s something deeper going on in organizations that motivates employees to thrive—or leave when that factor is missing. Organizational psychology is giving way to advances in neuroscience for insight into how and why people are motivated to achieve.

**Our brains are wired to seek knowledge and novelty**

Poet Robert Browning had a clue when he penned the oft-quoted line from *Andrea del Sarto*: “Ah, but a man's reach should exceed his grasp, Or what's a heaven for?” That segment from Browning’s 1855 poem hints at the human “seeking system,” which is that part of the brain (within the limbic system) that fires up the impulse to explore beyond what is already known; to reach new levels of understanding. It captures how our dreams always lie beyond our achievements and how our imaginations consistently strive for understanding.

In other words, this seeking system is the cauldron in which innovation, creativity, and curiosity simmer. Any environment dominated by fear as a motivator is poison to the seeds of creativity, curiosity, critical thinking, and collaboration (C4 quotient, or C4Q), and fertile ground for complacency, disengagement and other behaviors. It’s restricting the function of the human brain.

Psychologist Daniel Goleman and author of the best-selling book, *Emotional Intelligence* (Bantam, 2005) introduced the importance of five factors for emotionally intelligent leadership: self-awareness, self-regulation, motivation, empathy, and social skills. These overlapping leadership soft skills are essential for creating workspaces that encourage authentic out-of-the-box creativity for
both contrarian and conventional thinkers who enjoy chasing their curiosity down their respective pathways.

**Psychologically empowering workplaces (PEW) nurture C4Q**

The Curiosity Quotient (expanded to include creativity, critical thinking, and collaboration) is the new mantra for leaders in a world increasingly dominated by AI and COVID-19 disruption. The C4 quotient is a quick and simple back-of-the-napkin calculation. If a leader (or organization) encourages and supports three of the four-mentioned elements, that C4Q = .75; embracing all four, the C4Q = 1.0.

A 2017 McKinsey & Co report predicted that as many as 375 million people may need to find jobs in a new sector altogether to offset the threat that automation poses to employment. In this expanding era of AI disruption and post-COVID-19 paradigm shifts, current and up-and-coming leaders need a workforce and workspace vision shift for assessing their future value:

- Are leaders valued for what they know, or how they make others feel?
- Are leaders regarded for the value that can be measured, or for potential value their ideas can generate?

The choices are not either/or, but *yes/and*. With proper EI skills, training, and coaching people with a high C4Q capacity can set the standard for creating high C4Q workspaces.

David Picard, CFE, manages a group of Medicaid fraud investigators for the North Carolina Department of Health and Human Services. Having to deal with four team retirements in five months, the coming administrative transition from Medicaid to managed care, and several team members working from home
keeps David’s plate full. “Managing in such an environment,” David told me, “you have to use leadership curiosity, creativity, critical thinking and collaboration. It means keeping your hand on the rudder and steering the ship on a straight course with the four ‘Cs’ on board.”

Here’s what a PEW workplace looks like where leaders support C4Q development:

- Workers take initiative, apply risk assessment, and embrace uncertainty.
- Workers have the freedom to perform job-related activities with their acquired expertise.
- Workers have the authority and accountability to have an impact on higher-level strategic direction or operational results for the organization.
- Workers are granted self-determination regarding project work and related process that influence successful outcomes.
- Workers can perform tasks that complement their beliefs, behaviors, and worth.

In short, they feel valued as employees and people in the eyes of leadership.

Is there a larger vision of the importance of the four C’s?

Vince Walden, CFE, CPA thinks so. He is President of the ACFE Research and Education Foundation and a Managing Director with Alvarez and Marsal’s Disputes & Investigations practice. “When thinking about the four C’s in the context of the Fraud Triangle, it makes sense that companies whose leadership and culture display
high levels of curiosity, creativity, critical thinking, and collaboration would exhibit less ‘pressure’ to commit fraud within the organization as well as, perhaps, less ‘rationalization.’”

Psychological workplace empowerment is most evident at the group or team level; however, in any organization the degree of psychological empowerment will vary because it often is linked to a particular manager, director, or other leader. Where initiative, ingenuity, and any of the four “C’s” are constrained by leaders, high-performers will leave the company, while many of those remaining may pursue a variety of attitudes or behaviors to justify the perceived equity imbalance.

Psychological empowerment starts at the top but all employees are responsible for paying it forward.

**Three key leadership actions toward a psychologically empowered culture**

There are three key actions a leader must undertake to initiate the shift in culture:

**Remove the humiliation of failure**

Not all roads lead to success—especially on the first try. Leaders must accept and communicate that where out-of-the-box creativity is allowed to thrive; failure must be acceptable. In one study, researchers asked “What percentage of work that goes wrong is blameworthy?” Responses were in the low single digits. But when asked, “What percentage of failures ARE treated as blameworthy?” the response rate jumped to between 70 and 90 percent. Clearly there’s a disconnect in the messaging.

Such blame attribution leads to defensive posturing and not to correcting root causes of failure. Workplace mistakes must be
Donn LeVie Jr.

swiftly identified, but curiosity, creativity, and innovative thinking sometimes lead to dead ends. In the words of inventor Thomas Edison: ”I have not failed 10,000 times. I have not failed once. I have succeeded in proving that those 10,000 ways will not work. When I have eliminated the ways that will not work, I will find the way that will work.” That quote belongs in every corporate suite corner office.

When failures do occur, it’s best to pursue root-cause assessment without accompanying punitive measures or reprimands if you want curiosity, creativity, critical thinking, and collaboration to continue to thrive. Problem solvers, it turns out, are more than likely the same individuals who create exceptional value.

**Demonstrate fallibility and humility**

Presence-driven leaders with EI skills demonstrate humility and can admit to not having all the answers. Collaborative leadership invites suggestions and ideas from team members—especially those with prior experience with a particular problem or challenge. Otherwise, people will resist expressing curiosity and “what-if” scenarios to consider if leaders project an all-knowing aura. The leader with a high C4Q listens more than speaks and asks challenging questions while keeping judgmental comments in check. Let them run with it.

**Respond encouragingly**

To build trust one must do more than just listen. How you respond is critical. For example, simply thanking workers (genuinely) for their contribution helps encourage future contributions. Consider adopting some of their suggestions, “celebrating” their failure, and eliminate behaviors, words, and attitudes that destroy psychological empowerment. But it is not just the leaders who can
help build and maintain a psychologically empowered environment.

**Evolving approaches to leadership excellence**

Not long ago, different measures were used to assess leadership potential and effectiveness. Leaders stood out by having high IQs (intelligence quotient) for solving problems faster. Next, emotional intelligence (EI) measured their abilities to perceive and express emotion and develop strong interpersonal skills to better maneuver around organizational politics and lead others through change, disruption, and uncertainty.

Vince Walden sees the four C’s as important factors that shape internal culture: “While it’s hard to gauge ‘opportunity’ — the third leg of the fraud triangle — as that ties more to a company’s internal controls environment, certainly pressure and rationalization can be positively or negatively impacted by the four C’s as they drive culture and employee satisfaction.”

The AI and COVID-19 challenges will require leaders to encourage workforce curiosity, foster creativity in the workplace, encourage and require deeper critical thinking, and support more collaboration across business units. It also means being willing to contend with more people in the Big Tent tossing out new and contrarian ideas from a workforce comprised of digital natives, digital immigrants, and digital refugees.
7 ways to increase your leadership C4Q

1. **Wander into social media channels** you’d normally avoid. It’s difficult to raise your C4Q if you’re constantly in the same social media feeds that align with our perspective and presuppositions. It could spark potential collaboration or turn up the heat on your critical thinking.

2. **Think more like a consultant.** Do more listening; ask more questions. Stay open to new insight from others. Be the first to provide value with no strings attached.

3. **Nurture your network.** Reach out to those you’ve established relationships with every three to six months, practice “give before you get,” and read Harvey Mackay’s classic best seller, *Dig Your Well Before You’re Thirsty*.

4. **Continue investing in acquiring new knowledge.** Constantly seek out those activities that build ideas on the edge that most others dismiss outright.

5. **Work from one of your other “office locations” a few hours a week.** Take your work to the library, coffee shop,
in a park for a different view out of your normal “office window” to get fresh perspectives, new insight, and creative ideas.

6. **Vary your daily routine.** Newness and novelty spark curiosity and creativity, even swapping out morning tasks with afternoon ones.

7. **Connect with people from both the 20th and 21st centuries and from different countries.** It’s been said that we are the byproduct of our geography (where we come from), but we are also the byproduct of the cultural and societal norms of our upbringing. Go out and mingle (either virtually or in person). §§§
Donn LeVie Jr.
‘Thin-slicing’ experience

Can rapid cognition be a tool to help solve problems?

First published September/October 2021

Intuition, sensitivity to non-verbal cues, pattern recognition — our brains are capable of rapidly processing information to help us make judgments and decisions. This ability is called “thin-slicing.” It can provide another tool for fraud examiners to follow their instincts to the truth but only when we use it properly and recognize its limitations.

You’ve likely experienced a near-instantaneous flash of perception when meeting someone for the first time. Perhaps it was a strong feeling you had something in common, a shared interest or similar line of work. You felt an immediate rapid cognition of the experience, and it revealed itself to have been predictive — and accurate. Cognitive psychologists refer to this phenomenon as “thin-slicing,” whereby an experience or observation reveals an immediate recognition of a familiar pattern. Within as little as five seconds, individual characteristics are often visible or inferred through the thin-slice peephole.

System 1 processing is a critical-thinking shortcut

Thin-slicing, also known as “System 1 processing,” is considered a critical-thinking shortcut (intuitive, inductive, recognition primed). Examples of this are the interrogator who instantly surmises an interview subject is lying, a museum curator who immediately
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“knows” something isn’t quite right about a recent (expensive) Egyptian museum acquisition or the fireman on the scene who senses an impending roof collapse and evacuates his team just in time. Yet while thin-slicing can prove to be a vital tool, it’s also one best left in the hands of experts.

How our brains thin-slice experience

We humans are of two minds: the conscious, rational mind, and the “adaptive unconscious” (the part of the mind that engages in the thin-slicing process). The conscious mind excels at gathering sensory input and determining what to do with this data. In contrast, the adaptive unconscious is adept at evaluating minute bits of evidence about the external world — hence the term, “thin slice” — and then determines instinctively (and reflexively) how to react (emotion) or respond (emotional intelligence). This adaptive unconscious mind remains hidden from our awareness — until it presents us with some flash of cognition.

Is thin-slicing useful and valid?

In The New York Times best-selling book, Blink: The Power of Thinking Without Thinking, author Malcolm Gladwell explored the work of renowned marital expert John Gottman. Gladwell explains that Gottman can determine with 95% accuracy if a couple will still be together in 15 years — all within one hour of simply observing them. Gottman’s accuracy drops to 90% with only 15 minutes of observing couples. Even with such a reduced observation time, Gottman’s results support the thin-slicing phenomenon.

Thin-slicing for job, audit and criminal interviews

In the hands (or brains) of experts, thin-slicing can be an important tool to help different types of interviewers determine how best to
Pursue a line of inquiry — including acting on a hunch. Interviewees are deceiving, misdirecting or lying to them. This can be useful whether you’re interviewing a job candidate or investigating a potential fraudster. But use thin-slicing with caution and alongside other techniques.

Don Rabon, CFE, author, and president of Successful Interview Techniques, understands the pitfalls of running with just a thin slice or gut instinct without the help of other cognitive pathways.

"Some studies have shown that we form impressions of another in the first seven seconds. Other studies place it as low as one tenth of a second," Rabon says. He continues:

“My initial implicit impression of the interviewee is based in part on years of experience. However, in my meta-cognition — thinking about my thinking — I apply personal, professional skepticism. I am open to the idea there may be influencing factors below my level of consciousness in play that could be in error. Therefore, while I attend to my initial impression, I am not anchored to it."

Indeed, that gut instinct can raise useful red flags. But it can also come into conflict with our rational minds and what we see around us, often requiring an expert mind and a broader set of tools to ascertain the truth.

**Amygdala hijacking**

The amygdala (the brain’s emotion processing center in the limbic system) is responsible for that fight-or-flight response that served humans well in the past when they had to protect themselves against wild animals and other dangers. And in the modern world, that limbic system still heavily influences our decision-making.
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process. That’s largely because it reacts faster than the newer prefrontal cortex portion of the brain (the decision-making center) when we’re initially faced with potential threats. This results in what is called an “amygdala hijack” that prevents you from thinking clearly or rationally.

A study testing reactions to job assessments in two different groups illustrates how humans interpret different visual and verbal cues, and how that gut instinct can influence perceptions. In the study, researchers offered one group negative performance feedback accompanied by positive emotional signals — namely, nods and smiles. But in the other group, they gave positive feedback that was delivered critically with facial expressions that conveyed disappointment, such as smirks and lack of eye contact. Employees who received positive feedback accompanied by negative emotional signals reported feeling worse about their performances than did the participants who’d received good-natured negative feedback.

The combination of thin-slicing with an amygdala hijack may raise questions about a particular experience for the interviewee or the interviewer. Such a “pattern interrupt” can be interpreted as a potential red flag warning that something might be amiss with the individual or the experience. The trick, of course, is to determine whether those red flags are valid or not, and such occurrences may warrant deeper assessment and evaluation.

The lesson for managers in this job-performance study is that the feedback delivery was more important than the message content. So often, it’s not what you say that’s important; it’s how you say it that counts. In fact, how you say something may launch the amygdala hijack effect faster in another person than what it is you actually say.
When thin-slicing goes bad

There’s a menacing side to thin-slicing that has roots in prejudice and bias, and it’s known as the “Warren Harding Error,” named after the former U.S. president. At six feet tall, Harding was extremely likeable and strikingly handsome — but he wasn’t particularly smart, often lost his moral compass and was very gullible. Many consider him to be the country’s worst president.

The general public had the unwarranted assumption that Harding was a man of courage, intelligence and integrity. His charisma, presence and appearance played into their superficial and incorrect assumptions. This error is one of implicit bias where unconscious assumptions about someone aren’t surrendered even when people are presented with evidence to the contrary.

This effect plays into the popular stereotype that automatically associates leadership ability with physical stature. Such bias represents more of an immediate emotional reaction than rapid cognition. That’s worrisome because it reveals that important leadership positions in the public and private sectors are often determined by less rational decision-making than would otherwise seem.

Timing can enhance Warren Harding Error

The “primacy and recency effects” (first-impression bias) sometimes work in tandem with the Warren Harding Error to cement an incorrect impression of someone due to the inordinate positive or negative influence that the most recent information (rumor, press coverage or “fake news,” for example) may have conveyed to others. Politicians use the primacy and recency effects as strategic weapons in their electoral campaigns by ensuring that the most recent positive publicity about themselves — or negative
attacks ads about the opposing candidate — are in the public domain.

**Thin-slicing experience requires caution**

Our brains rely on mental shortcuts to simplify making critical and non-critical decisions from all the sensory input we encounter every day. There are many neural-processing shortcuts, called “heuristics,” and each occurs in different contexts. It’s important to be cautious, however, as these detours can result in errors and bias. Fraud examiners should keep these caveats in plain sight to maintain a proper perspective during investigations and suspect interviews.

Most communication is honest, so it’s to our advantage to presume other people communicate truthfully to facilitate efficient communication. But this presumption leaves us open to being deceived on occasion. Being suspicious of others can arise from obvious deception motives, questionable demeanor or body language — when communication content is at odds with known facts, and context is misaligned.

**What has thin-slicing taught us?**

We know from decades of research that people are, overall, better than one would think at decoding many facets of a stranger’s personality and persona based on an immediate first impression in social situations. And thin-slicing is a useful tool, but it’s not one to be used by itself.

Consider other variables when you’re assessing thin-slicing’s effectiveness. For instance, sensitivity to non-verbal cues for determining personalities works best with people from the same culture. We also know that women make more accurate
assessments using thin slicing than do men. And strangers often assess each other through the cues most readily available to them, the most obvious being physical appearance.

This tendency revealed itself in a 2007 study that suggested a connection between physical cues and shared stereotypes. When that happens, stereotyping becomes profiling.

Thin-slicing is a fascinating ability unleashed by the complex and mysterious human brain. For fraud examiners, learning to harness this innate “mind hack” capability, while avoiding its pitfalls, could raise investigations to an entirely new level. The fictional detective Sherlock Holmes perhaps offered the best advice on how to approach strangers and experiences in Arthur Conan Doyle’s book *The Sign of Four* when he said, “It is of the first importance not to allow your judgment to be biased by personal qualities … a client is to me a mere unit, a factor in a problem. The emotional qualities are antagonistic to clear reasoning.” §§§
Donn LeVie Jr.
What’s your IQ? (Influence Quotient)

We all have an ability to influence and persuade, but how skilled are we at it?

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Have you ever tried to make an important decision that’s 100 percent rational? Even for a fleeting microsecond, did you consider risk or weigh the consequences of that decision?

Our brains have evolved to take the path of least resistance and other short cuts when assessing our everyday environment and situations. It requires too much processing power to navigate with excruciating detail in an increasingly complex world. It takes more cognitive effort to enhance awareness, be present, and reflect more deeply – especially for ideas or suggestions that confront deeply held beliefs and opinions.

When opinions hold sway over facts

Most of our fundamental beliefs and opinions are kept behind a well-guarded fortress because it keeps out conflicting perspectives that challenge how we see the world. We need a compelling motivation offered in a way that touches upon what matters to us before we consider lowering the drawbridge to adjust our position, opinion, or belief.

When you’re engaging with new business associates, employees, or clients, they’re looking for something to connect you to them.
They are looking for empathy for their situation that makes you relatable and relevant that lowers defenses and objections. People buy YOU first because who you are is always more important than what you do. That’s a universal law; better than that, it’s how we are hard wired.

Confirmation bias and the Backfire Effect

The harsh truth is that we humans are emotional creatures, not rational ones, thanks largely to the brain’s neurochemistry. Indecisiveness or impulsivity often reflect underlying emotional influences. We seek data and evidence that affirm our beliefs and opinions. We hold to our opinions even when presented with facts that refute them in what’s called “confirmation bias.” Naked facts have rarely been enough to change a well-dressed opinion.

In such situations, someone’s attempt to convert our thinking, opinion, or belief with more facts and more evidence usually fails; it boomerangs on them. Psychologists call this the “backfire effect.” and it’s all because our brain chemistry hasn’t detected an emotion-inducing stimulus – primarily empathy – to make us receptive to mind- or belief-changing ideas.

Confirmation bias and the backfire effect can show up in the most unexpected situations and circumstances. On a recent flight layover, my wife and I decided to enjoy a glass of wine at one of the airport restaurants. I ordered a glass of cabernet sauvignon, which when it arrived, was the worst cab I’d ever tasted. I asked my wife to take a taste. “That’s not a cab,” she replied. “That’s a malbec.”

When I heard that, my confirmation bias at first told me she was wrong, because my brain influenced my taste buds’ expectation. I was resistant to that contrary idea of the wine being a malbec
because my verification bias was telling me: “Donn, you know your cabs” (backfire effect engaged). But my wine expectation underwent a radical shift after another taste when I realized that in fact, it was a malbec. “Well,” I replied somewhat sheepishly, “Then that’s a surprisingly good malbec!”

**Intelligent influence can be persuasive or manipulative**

Applying communication/language strategies during all kinds of business transactions in Fortune 100 companies over my career got me interested in how certain areas of the brain influence thoughts and actions when stimulated by particular emotional triggers. “Ethical influential intelligence” (a learned skill) helps leaders better connect to employees, clients, and customers.

Influential intelligence can also be used as a weapon of manipulation for corrupt, self-serving purposes, as seen with con artists, fraudsters, and psychopaths in the C-suite. Both the ethical and corrupt uses of influential intelligence involve the same tools: engaging others; positioning of your expertise, knowledge, or value; influencing the direction or outcome; and converting others or getting their compliance. One approach creates clients, customer, champions, and allies; the other, misery, regret, anger, and victims.

The way forward with others is through the use of language strategies that positively engage and influence at deeper levels.

**Personal story is important persuasion tool**

The approach to persuasion includes relating the best fact-based, context-centered version of your actual story, of who you are. Back in my corporate days when managers would pass along a candidate for me to interview, I would ask: “So, tell me something
about yourself…” What I was asking for was their story; I was looking for a connection. Most of the time candidates simply recited their résumé. I already had that in front of me, so they failed that test. The candidates who made that favorable impression knew how to reply with a short fact-based, context-centered response.

One of the best responses I ever received to that question was this from a programmer: “I’m a cello-playing kid’s soccer coach, PTA board member, and darn good programmer with an eye on your project budget and schedule.” The first part of his response was the fact-based portion of his story, which told me a lot about who he was personally; the second half focused on the context of the conversation, which was the job interview. I connected with him on both parts, and I approved his hire on the spot.

The act of persuading someone else to buy in to your proposal, sign a large purchase order, offer you a job, or give you what you want first begins with being very familiar with that person and caring about who they are and what they need. Empathy is the communication bridge that connects buyers and sellers; consultants and clients; managers and employees; doctors and patients.

Persuasion and influence develop over time. A persuasion language strategy involves empathy, authenticity, master narrative, proof points, visual language, and storytelling. Motivational speaker and master storyteller Zig Ziglar captured the concept of influence and persuasion perfectly: “People don’t care how much you know until they know how much you care.” You must engage genuine empathy in your persuasion approach to reach your audience.
Persuasion strategy first requires specifics

A persuasive strategy for helping another party requires specifics and details. More often than not, you have to extract those specifics vs. their offering those details freely.

I often speak to meeting planners and corporate HR people about hiring me for one of my live or virtual programs. The first step is to get down to specifics. I have to be prepared to dig deep to get at their ultimate want by asking a series of questions, such as: “What outcome do you want?” or “What does success look like?” “Why is that important?” “And why is that important?” “How does that get you closer to your outcome?” “And what else?” (repeat as often as needed). I have to push beyond those initial responses I’m getting for me to help them (and me) uncover the one major underlying issue that shapes my understanding from their perspective.

Over my career and in my work with individuals in corporate programs and virtual mentoring programs I’ve noted three common qualities of those who show a high level of influential and persuasive intelligence:

- **They have a compassionate morality.** They are honest, humble, and conscientious. They show restraint in tense situations. They feel guilty for private failures and show remorse for public ones.

- **They have empathy.** They are receptive to the emotions and feelings of others, not out of a sense of being empathetic as a result of a decision to be so, but of a genuine innate concern for a deeper connection.
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- They operate on principled ethics. Being honorable, just, noble, righteous, and virtuous are non-negotiable elements of who they are.

These are qualities of “other-serving” (vs. self-serving) individuals.

Using the influence of reciprocity to get compliance

I recently ran an A/B test on a survey I sent out to a number of people. In the email to 50% of the list, I simply asked them if they would complete my short survey within the next week. My response rate was about 15 percent. The other half of the list received the same email but with this line added: “I really value your insight and opinions to help me determine which project direction I should undertake.” That response rate was over 50%.

By adding the slightly flattering text to the email going to the second group, I set up the “reciprocity” effect (one of seven major influence categories), whereby it prompted those respondents to complete the survey sooner than later. Another way of looking at reciprocity is the “obligation” response. It’s human nature to want to balance the obligation equation (not be indebted to others).

The ethical and positive use of influence language can establish relationships; it can motivate and inspire others into action; it can span differences that separate, divide, and alienate us from each other. While we may labor over the language we use to frame our outbound message to clients, employees, spouses or whoever, what matters most is the inbound message they actually hear, because if we confuse, we lose.

If they can’t hear us, it’s not their fault.
The Change Triangle

The Change Triangle (Figure 7) has been around for a while under different names, but this iteration is from Hilary Jacobs Hendel, author of *It's Not Always Depression*. If a situation causes you or someone else to be out of sorts, find out where you or they are on the Change Triangle: defense, inhibitory, or core. Moving clockwise around the Change Triangle progresses from defensive posturing, through the emotional inhibitions, to the core emotions, which then guides individuals toward persuasive engagement. 

![The Change Triangle](source: Hillary Jacobs Hendel, It’s Not Always Depression [Random House, 2018])
Donn LeVie Jr.
Managing troubled projects

If people are involved, it’s a troubled project. Here’s why.

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During the course of their careers, nearly everyone will inevitably run into major problems while managing a high-profile project. The project management field provides many helpful resources to bring projects to successful completion but throw people in the mix and that human interaction can become a messy affair. Here are some tips to minimize cognitive bias and other psychological pitfalls that can sabotage the best-laid plans.

If you’ve ever attended project management training, you learned about the factors that help control the various project phases: planning/goals, project scope, timeline, budget, work breakdown structure (WBS), quality, communications and the project team. Following these practices helps place guardrails on your project, barring of course a highly improbable and consequential occurrence, commonly known as a “Black Swan” event.

I once believed that a project’s weakest link was scope creep, the uncontrolled growth of a project that accommodates the need for more labor, budget and time. I quickly learned, however, that this had an easy solution. Just ask the project stakeholder “which of these other priorities should I cut back on to make room for this additional unplanned effort?” That usually got them to reconsider their request.
When I was leading projects at Motorola, my team and I attended two weeklong programs, “Managing Projects in Large Organizations” and “Project Risk Assessment,” administered by George Washington University. On day one, an instructor made this memorable statement: “Too few people on a project can't solve the problems; too many create more problems than they solve.”

And so we were cautioned.

**Humans - the weakest links in the chain**

That’s when I learned that the weakest links in the project management chain are people. Even when you budget for extra time, a project is likely to take longer than you expected either because of a post-facto decision — or a failure to make one. No matter how focused and committed the team may be, projects often stumble due to bad decisions. And the more people involved, the more likely the project will suffer from “variance” — project-management parlance for the difference between what was planned and what actually happens.

“People are indeed the weak link in managing projects,” Jeremy Clopton, CFE, Director of Upstream Academy, tells *Fraud Magazine*:

> “Individuals’ unconscious biases, previous experiences, and personal beliefs will influence how they approach each forensic project, even if that isn’t the intent. This weakness is likely most prevalent in determining where to look for fraud, evaluating the types of fraud that may or may not be possible, and the plausibility of other explanations.”
We can’t help it if our first inclination is to run to the “been there, done that” answer or solution. The brain selects what is familiar and quickly accessed from memory. It’s called cognitive bias.

**Cognitive bias is not your friend**

Individuals on a project team may favor different approaches to even the smallest task on the WBS. And while rules to restrict subjective judgment and variability can help keep inconsistencies at a minimum, the decision-making process remains vulnerable to all types of psychological pitfalls. These include a tendency for our brains to jump to System 1 “rapid cognition” thinking. That, in turn, can lead to systemic, predictable errors of judgment if the more rational, logical (and slower) System 2 thinking isn’t invoked as a check on System 1 impressions.

There is also a type of cognitive bias known as the Dunning-Kruger Effect. It appears when people with limited knowledge or competence in a field (fraud investigation, for example) critically overestimate their own abilities in that specialty when compared to objective standards or performance of their peers.

Project managers would do well in taking heed of Charles Darwin’s well-known quote: “Ignorance more frequently begets confidence than does knowledge.”

Ryan C. Hubbs, CFE, global anticorruption and fraud manager for Schlumberger and former ACFE Board of Regents member, describes an interesting variation on the Dunning-Kruger Effect. “If we were to really dissect big project failures, we would probably find several instances where managing by position or seniority was a contributing factor in the failures; and managing by experience and expertise had less instances of failure,” he says.
“A title alone does not imbue the holder with instant knowledge. Yet some individuals may exhibit ‘position bias’ or evoke the ‘I’m the boss attitude in making critical decisions.’”

What’s that noise?

If the Dunning-Kruger Effect wasn’t enough to worry about, we humans are also unreliable decision makers simply because a whole host of external factors can influence our moods while we work on a project.

Concern about the weather, worrying about the expense of a new roof, or anxiety over that upcoming root canal can change our disposition. When that happens, the brain unleashes serotonin, dopamine, glutamate and noradrenaline, all of which have an effect on our judgment – as do adrenaline, cortisol and melatonin.

Invisible influences affect decisions, judgment

Nobel Prize-winning psychologist Daniel Kahneman, co-author of Noise: The Flaw in Human Judgment, has highlighted how psychological or cognitive noise (as separate from bias) impacts our judgment. Kahneman, along with his co-authors, Cass Sunstein, and Olivier Sibony, cite research where judges pronounced stiffer sentences for juvenile offenders on Monday morning if the local football team lost a game over the weekend.

The book also illustrates how judges are also more likely to hand out harsher punishments if they are hungry. When cognitive bias is ruled out, such correlations (not necessarily causation) are likely attributable to one thing: noise.
Understanding different types of system noise

System noise consists of two components: level noise and pattern noise. Nearly every decision-making process involves level noise — how people have different levels of judgement in a particular system. Employee performance evaluations are a good example of level noise. One manager may be magnanimous in their evaluations of subordinates, while another — using identical evaluation criteria — may be more mean-spirited. We see the same ambiguity with “on a scale of 1 to 10” ratings. One manager’s employee ranking of a “7” is another manager’s ranking of a “5” for the same criteria.

Pattern noise is harder to predict and is a significant source of decision inconsistency. It results from how people see the world differently from one another. We believe what we believe for various rational and irrational reasons justifiable only to ourselves. As Sibony describes it, pattern noise comes from our idiosyncrasies. It’s why a tough judge might be more lenient with white-collar criminals.

Take the recent Winter Olympics, for example. Any event where judges are involved introduces level noise, pattern noise and occasion noise (when, for example, an external event like winning the lottery changes the mood of the judge). Each of the judges has their own individual interpretation of objective ranking criteria when judging athletes, which is level noise. When judges disagree individually as to whether an athlete should advance to the medal round or go home, they exhibit pattern noise. When the judges disagree among themselves, they display occasional noise.

That’s why judging scores for skating individuals or pairs has variability. Judges can check all the objective criteria boxes on the score cards. But having to assign a numerical score is where noise
comes into play — especially in situations where judges harbor strong nationalistic tendencies.

**How to clean up the noise**

In *Noise*, the authors describe a process for reducing noise in decision making:

1. Have individuals on the project team agree to remain independent of each other as each investigates potential causes and factors of a problem or defect. Staying independent of others helps gather more information about the problem without the temptation of arriving at the most logical or obvious solution at the beginning of the process.

2. Next, aggregate responses. Postpone a universal view or decision of the underlying cause of the defect until all information has been gathered, processed, and discussed to avoid jumping to premature conclusions.

Years ago, I facilitated meetings at Intel Corporation to address defects and bugs during the microprocessor design process. At these meetings, which were formerly run by engineering project leads, engineers would get bogged down in discussions about each defect (imagine 10 people on a team with 10 different opinions on whether an “issue” was a true defect).

By the end of a two-hour meeting, they’d only discussed a handful of the 60 to 100 logged defects. The engineers were trying to solve individual defect problems too early in the process; and the project leads were only supposed to lead the meetings, not be involved in the discussions.
Engineering management saw that there was an issue with how the meetings were run, so I offered to run them instead. I allocated a time limit for each defect discussion — if the issue couldn’t be resolved quickly by consensus at the end of two minutes, I would appoint two engineers to examine the defect outside of the meeting and report back at the next scheduled meeting. That way, we were able to get through 100 or more defects in a two-hour meeting by preventing participants from jumping to conclusions and trying to find remedies on the fly. The former approach was too noisy and costly; the later approach was less noisy and less costly.

**Algorithms or people?**

Can a rules-based approach to decision making using bias-free and noise-free algorithms do a better job than humans? According to Kahneman, decidedly so. The short answer is because mechanical approaches are noise free. That said, the best managers are arguably necessary. They can look beyond the noise and successfully bringing together the expertise of their team to reach a successful conclusion to any project.

“Without individuals’ expertise, judgment, and intuition — and being properly aware of the influence of cognitive bias and noise — we would not move from evaluation to conclusion in a project,” says Clopton. “The most successful examiners can balance the strengths and weaknesses of their people to lead a forensic project.”

And finally, one last pearl of wisdom from the George Washington University project management instructor on working with a team of people with different psychological propensities. “Change is inevitable — except from vending machines.”
The Dunning-Kruger Effect

The Dunning-Kruger Effect describes how most people with limited knowledge or competence in a field critically overestimate their own abilities in that specialty when compared to independent standards or the performance of their peers.

Because people who have insufficient knowledge of a particular field aren’t aware of their own shortcomings, they usually believe they know more than they do. They are then inclined to choose the option that is most sensible and ideal, which many times isn’t the best choice.

The illustration of the Dunning-Kruger Effect (See Figure 8) shows the psychological journey that people take during this process.

![The Dunning-Kruger Effect Diagram](image)

*Figure 8. The Dunning-Kruger Effect*

Initial confidence levels are very high on the Y-axis compared to the associated low competence level on the X-axis. When we realize
we know a lot less than what we had thought, we enter the “Valley of Despair.” But as we gain more skills, knowledge and experience, our competence levels rise as does our confidence along the “Slope of Enlightenment.” With further success, we reach the “Plateau of Sustainable Confidence and Competence.”

“The key takeaway is recognizing where your knowledge, skills, and abilities begin, and where they end, and what you must do to improve,” says Ryan C. Hubbs, CFE, global anticorruption and fraud manager for Schlumberger.

“Only then can you make the best decisions with the knowledge that you have and defer the more complex decisions to those with the expertise to handle them.”
Donn LeVie Jr.
Mentoring can move your career forward faster

Whether you’re at the beginning of your career or second career...or you’ve had years of experience, consider entering into a mutually beneficial mentor-mentee professional relationship.

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What do Mark Zuckerberg, Charles Schwab, Bill Gates and Oprah Winfrey have in common?

They’re all mentors, and they each had a champion who was a trusted counselor. Zuckerberg was fortunate early on to have Steve Jobs as his mentor. Bill Gates has Warren Buffet. Charles Schwab had Andrew Carnegie. And Oprah had the poet Maya Angelou.¹ Many other accomplished people cite family members, professional acquaintances and friends who provided valuable guidance, encouragement and wisdom that propelled their success. Even Hollywood has cashed in on making movies with a mentoring/coaching theme.

Perhaps you’re at the beginning of your career (or second career), and you’re thinking of asking an experienced leader or executive in your organization to be your mentor. Or maybe you want to invest your years of experience in some budding fast-track workers with leadership potential.
Mentoring offers benefits for both parties

Mentoring programs help measure and improve employee performance. The results of a five-year mentoring study by Sun Microsystems University showed that 25 percent of mentoring partners and 28 percent of mentors enrolled in the company program received raises compared to five percent of employees not enrolled in the program.

In a similar benchmarking study, the Association for Talent Development reported the most cited benefits of mentoring were: acquisition of new perspectives (59 percent), improvement in their leadership skills (49 percent), professional development (36 percent) and greater understanding of corporate culture (30 percent).

Mentors can help place you on fast track to successful career

Years ago, the NOAA Atlantic Oceanographic and Meteorological Lab (AOML) director volunteered to be my first mentor when I began working at the agency as a cooperative education university student. During my first week on the job, he gave me a handful of journal articles written by oceanographic researchers who worked at the lab. When I finished that assignment a week later, he asked me, “Based on what you’ve read, how do you now see your position contributing to the success of the work being done here?”

The assignment forced me to do a deeper dive into what NOAA expected of me. That assignment gave me a much greater appreciation for the outcome of the research as well firing up my eagerness to succeed. In fact, the NOAA lab promised me a full-time position six months before I graduated in 1978.
Shortly after NOAA hired me, two leading scientists at the lab took me under their wings, shared the details of their research projects and included me in their scientific research expeditions in the Atlantic and Indian Oceans, and the Gulf of Mexico. Those experiences boosted my interest and opened doors for me a few years later when I entered the oil and gas exploration field. In 1982, while working at Phillips Petroleum, that NOAA lab director provided a necessary recommendation for me when I was accepted as one of 5,000 original applicants as a mission specialist for the NASA space shuttle program.

**Mentoring then and now**

Mentoring relationships have evolved to align with dynamic workplace environments. Participants now construct more fluid boundaries, timelines, guidelines and expectations. In the digital age, arrangements often aren’t formal or lengthy; they can last from a few hours to a year. Mentors in the past could spend years helping mentees’ career objectives.

However, mentor relationships now — in the high-tech field, for example — can center around tasks in specific specialties to fulfill immediate and near-future needs.

“Just-in-time” mentoring associations, which could last only hours or weeks, might resemble coaching more than actual mentoring. The trend is to merge coaching and mentoring. Mentors often incorporate a Socratic questioning methodology rather than the old-school, leading-by-the-hand method. Socrates’ methods build mentees’ critical thinking skills so they can more effectively evaluate their assumptions and actions.
Who can serve as a mentor?

A mentor can be anyone with expertise, skills, knowledge and experience to share with others and a willingness to serve as a trusted advisor. Manager-employee and employee-to-employee (peer-to-peer) are common mentor-mentee arrangements. Arrangements between C-suite executives and other high-level professionals often are elevated to “advocate-protégé” relationships.

Keys for successful matchups

Except for transferring of information, telephone and in-person conversations work better than emails because vocal intonations and facial expressions and gestures communicate so much more.

Other important considerations:

• Reserve blocks of time for meetings and commit to them.
• Respect each other’s workloads and schedules.
• Define clear objectives and realistic, attainable goals where feedback is needed from both parties.
• Mentors should provide sound advice based on expertise and experience — not personal opinion.

‘Reverse mentoring’ opportunities on rise

Younger employees who are familiar with digital technology and social media applications can mentor senior executives who are deficient in those areas. Reverse-mentoring participants often meet once per month for up to one year. The mutual benefits are obvious: Mentors gain access to senior executives, and mentees learn high-tech techniques for promoting their organizations’ brands.
Be prepared for mentor-mentee relationship

When I received multiple requests for mentoring during my career, I had to ask myself, “How do I decide who to mentor?” I enjoyed helping younger employees, but I also needed to get my work done. Other questions as you judiciously choose mentees include:

- How motivated is the mentee to move their career forward?
- How large is the gap from where they are now to where they want to be? (Generally, the wider the gap, the less effort required by the mentor.)
- Am I the best person available to help with their request?
- What does the mentee want to learn? How do they think my specific experience or expertise will help them achieve their goals? Directly ask the mentee to determine whether you’ll be a good fit.

It’s a good idea to first ensure that potential mentoring partners are sufficiently motivated and have a clear understanding of what they want from the mentoring arrangement before agreeing to engage in the mentor-mentee partner relationship.

Some simple rules will keep mentoring relationships productive and professional:

- Exchange common courtesy for chivalry lest such actions be misinterpreted.
- Allow mentees to decide when and where to meet and other logistical details.
- Stay focused on the work, skills, talents and the potential professional benefits both parties might receive.
What if your mentor isn’t available?

Heavy workloads and home-schedule conflicts are the bane of 21st century living. If you have your heart set on a possible mentor, but that person just isn’t available, offer to have coffee or lunch together occasionally. You don’t want to be a pest, but the connection could evolve into a rewarding, productive mentoring relationship. If the prospective mentor appreciates your congenial tenacity, they might want to make you part of their reoccurring schedule.

Beyond traditional mentoring: advocate-protégé relationship

When a traditional mentoring relationship runs its course, what other options might be available to stay on the fast track? In some organizations, this higher level of personal professional development — known as the advocate (or sponsor)-protégé relationship — might be available informally. (“Protégé” means “one who is protected.”) We can find scores of books, videos and blogs on mentoring, but little is available yet about this advanced relationship.

I’ve never engaged with an advocate, but I’ve witnessed several advocate-protégé arrangements from a distance. Such high-level relationships are more leveraged (using executive-level “capital,” such as position, influence and connections to receive personal or professional benefits) than mentor-mentee connections. Both parties must carefully consider the necessary work to make this type of years-long relationship successful.

Talented advocates often look for likely protégés with potential — often fast-track mid-level executive leaders — to groom for the C-suite. It’s likely that Steve Jobs, Warren Buffet, Andrew Carnegie and Maya Angelou were serving more as advocates than mentors.
with their respective protégés because those protégés were already quite successful.

Junior executives on the rise might want to have more than one advocate as a fail-safe because not every would-be advocate is cut out to assume that role.

**Understanding the advocate-protégé relationship**

The advocate-protégé relationship is symbiotic and reciprocal with give-and-take benefits for both parties. These arrangements can contribute toward stronger and stable succession planning for an organization.

Many advocate-protégé relationships have unspoken *quid pro quo* arrangements where an advocate grants favors to a protégé (access or exposure to other high-level executives or initiatives) but might call them in later by expecting exceeding loyalty. Therefore, ideal advocates and protégés should have integrity, so advocates place the interests of protégés above their own, and protégés have the fortitude to not become sycophants.

Such cooperative professional relationships can greatly accelerate every facet of a young leader’s professional advancement ranging from promotions and raises to greater job fulfillment. Many advocates foster protégés because they enjoy “paying it forward” as others have done for them and want to encourage protégés to do the same.

On the downside, those not familiar with advocate-protégé connections can sometimes perceive them as political favoritism when the arrangements aren’t clearly based on merit.

I’ve observed that an advocate might continue to help a protégé if the protégé fails once. But if the protégé fails consistently, the
advocate will likely (and quickly) sever the relationship because they’ve staked their reputation and political capital on the protégé’s success.

Therefore, keep your eyes wide open if you enter an advocate–protégé relationship.

The wrong advocate can sideline a protégé’s career advancement within an organization because the protégé didn’t conduct sufficient due diligence.


**Mentoring is…**

To paraphrase Sir Isaac Newton, mentees stand on the shoulders of giants. Ideal mentors don’t remake a mentee in their image. Instead, they give the mentee knowledge, tools and encouragement to shape their own futures.

A mentor freely distributes wisdom that his or her successes, failures and experiences have honed. They’re a trusted advisor who can help correct a mentee’s navigation through the shallows and shoals. They offer the gentle but sometimes necessary nudges when a mentee’s self-doubts, uncertainties and fears immobilize their progress. §§§
About the author

Donn LeVie Jr. has enjoyed a rewarding 33-year career leading and managing professionals, projects, and programs at all levels in the public sector (NOAA), Fortune 100 companies (Phillips Petroleum, Motorola, Intel) and in higher education (University of Houston).

In 2013, Donn set out on his own as a leadership coach and mentor, speaker, and strategist serving public and private organizations and associations primarily in the anti-fraud sector. He holds the “Certified Fraud Examiner” designation.

Donn is the author of two award-winning business/career strategy books: *Confessions of Hiring Manager Rev. 2.0* and *Strategic Career Engagement*, both of which have won the International Book Award and Global eBook Award for business/careers. He is also the author of *From the Underworld to the Boardroom: True Tales of Fraud, Corruption, Counterfeiting, and Cons*.

Donn currently lives in Austin, Texas with his wife Jeanette. Now retired, he continues to author books on the power of influence, writes for *Fraud* Magazine, and occasionally speaks to corporations and association conferences. To learn more about having Donn speak to your organization or event, contact him at donn@donnleviejrstrategies.com.