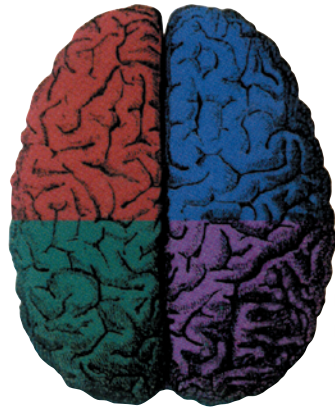


Core Values Index™ resource guide for business owners, managers,
executive coaches, counselors, human resource leaders, and individuals.

THE CORE VALUES HANDBOOK

Introducing the only assessment that characterizes and
measures the innate unchanging nature of people.

**“How Can They
Possibly Think
Like That???”**



Lynn Ellsworth Taylor

The Core Values Handbook

“Employment Pre-Selection Science™ from Taylor Protocols is the most powerful business optimization system I have ever found!”

Chuck Orton, President
M&M Comfort Systems

The Core Values Index™ (CVI™) characterizes and measures each person's *Real Core Values Nature™*. This is the essential self that Abraham Maslow asserted is the innate unchanging nature in each of us that causes us to want to make our unique contribution. It is that part of us that determines where we fit, where we can each make our highest and best contribution. Fully automated *Employment Pre-Selection™*, team building, conflict resolution, leadership training, management, restructuring departments, and businesses—all business and personal decisions are improved for those who have the advantage of the *Core Values Index* and the powerful *Taylor Protocols™* that effectively put this revolutionary technology to work.

Inside you will find:

- A complete handbook on the *Core Values Index*, its interpretation and its direct personal and business applications.
- An introduction to the amazing *Taylor Protocols* that utilize the CVI for the optimization of any kind of business. This assessment and the *Taylor Protocols* were developed in the fires of 400 business turn-around and business restructuring projects.
- A first look at the revolutionary *Employment Pre-Selection Science* that David Mashburn, Ph.D., asserts “...is the first system to characterize and quantify the innate unchanging nature of individuals, and the first employment system to connect this unchanging nature with the tasks of the job.”

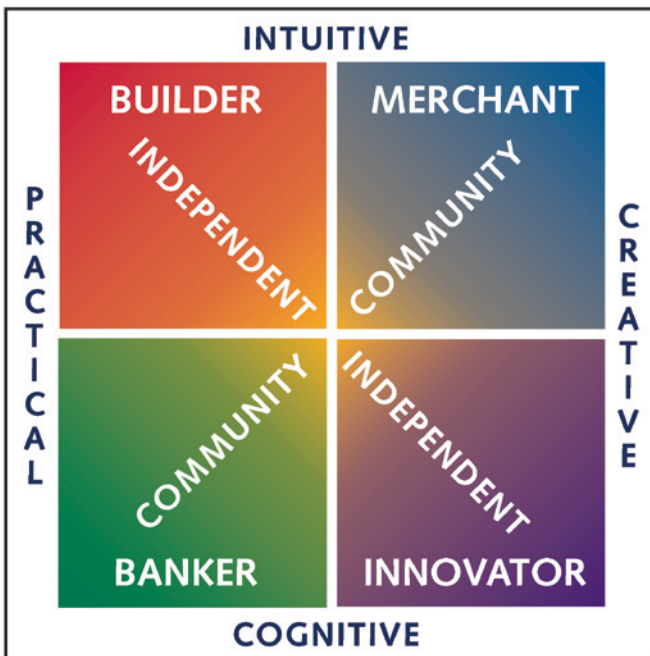
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THE CORE VALUES HANDBOOK

A primary manual for learning about
the Core Values Index™ (CVI™)



*Dedicated to my sons Greg and Doug
whose lives are a joy to me.*

THE CORE VALUES HANDBOOK

Introducing

The new *Employment Pre-Selection Science*[™] (*EPSS*[™])

The revolutionary *Core Values Index*[™] (*CVI*[™])

And the extraordinary *Taylor Protocols*[™], business optimization technology

Foreword by:

Glen Villalobos, National Executive, Human Resources, Volunteers of America.

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Jerry Marble, my long-term business partner, for his support and his contribution to the first edition publication of this work, and for his untiring support of all of our combined business restructuring successes over the past twenty years.

About Glen Villalobos

Glen is the president of Gulf States Management Services, Inc. His human resource management experience and business ownership success make him an appropriate and much appreciated contributor of the introduction to this book. With a Bachelor of Science degree in Business Administration from the University of Redlands and a Master of Arts in Psychology and Organizational Behavior, Glen Villalobos consults with for-profit, nonprofit, and community organizations. His company provides human resource services, payroll management, and compliance guidance to hundreds of Louisiana businesses.

As the developer and coordinator of the Small Business Human Resource Certification Program for the Small Business Development Center at Southeastern Louisiana University, Glen has consulted with many businesses of all sizes and types. He is adjunct faculty member for Tulane University and the University of New Orleans and is a certified vocational educator. He is also a certified trainer for FastTrac from the Entrepreneurial Education Foundation.

Previously, Glen was a national executive for Volunteers of America, one of the country's largest national nonprofit human service organizations, and was human resource manager for Ferranti International Signal and Hughes Aircraft Company.

Having graduated from Moderator Training School at the Bethesda, Maryland-based RIVA Institute, Glen is also a specialist in qualitative research and continuous quality improvement. He has served as lead facilitator for the Louisiana Economic Development Commission, Culture Recreation, and Tourism Task Force in developing its strategic plan.

Glen is a graduate of the Leadership St. Tammany West Program and currently serves as a board member and Curriculum Committee Chair. He is past president of Northshore Kiwanis and board member for the Gulf Coast International Hispanic Chamber of Commerce.

ABOUT THE ASSESSMENT

The *Core Values Index* is the only assessment that characterizes and measures the innate unchanging nature of an individual. The accompanying *Taylor Protocols* and the revolutionary new *Employment Pre-Selection Science* put the power of this assessment directly to work, connecting the innate nature of people with the tasks required by their job.

What I don't know about myself controls my life.

If I don't know *who I am* at the innate unchanging level, I cannot fully comprehend how I operate, how I think, what motivates me, what kind of work causes me to be fully engaged, what my highest and best contribution must be.

Self-knowledge is the cornerstone on which leadership, top performance, and high contribution are built. If I do not know and understand the ineffective ways I handle the variety of people and situations in my life, if I am not willing to change the attitudes and ideas and beliefs that motivate these ineffective behaviors, if I am not aware of the beliefs and ideas which I keep locked away—supposedly out of sight—I am controlled by these things. I will find myself responding to a boss or a peer or an employee (or spouse or child) just like I used to respond to my father or mother or sibling.

All of us live to some degree in this unconscious state, unaware of the stimulus and response (knee-jerk) patterns of our lives. The power of any leader derives directly from knowledge of these patterns and a willingness to become ever more conscious of them. To the degree that I know myself and remain conscious of the beliefs and attitudes that control my behavior patterns, I am in control of my own life, I am psychologically and spiritually awake, I am able to make conscious choices, I can ask myself “What is the most effective response?” rather than simply react out of old personality scripts or comfortable patterns.

What I don't understand about others dictates my business success.

Putting the right person in the right seat, the first time, almost every time, makes business management simpler. This single business skill contributes more to human productivity and business profits than any business tool, system, philosophy, or automation technology. That's why this book and the *Core Values Index*TM hold the key to extraordinary business success

This is the power offered by the *Core Values Index*, our new *Employment Pre-Selection Science*, and the complete suite of *Taylor Protocols*, our revolutionary human resource technology.

FOREWORD by Glen Villalobos

The Core Values Handbook

One of the most challenging issues facing business owners or managers is the right selection and commissioning of people. Effective hiring practices and methodologies, while being extremely critical to the success of any business, have continued to be an elusive “Holy Grail” of management. That was true for me, until I discovered the *Core Values Index* and the new *Science of Employment Pre-Selection* that it powers.

Organizations are social systems and as such are microcosms of our society. The complexity of our society is replicated in the workplace. Attempts to offer solutions to improve right hiring and interpersonal relations have been numerous. Some programs teach fundamental skills and promote the practice of specific behaviors to use at the correct time. Other programs seek to improve management in the workplace by using the work team concept.

There have been numerous attempts to provide a reliable employment selection system. But *Taylor Protocols* has shown that the 80/20 principle is still endemic in almost every position, in every company, across all industries. The performance bell curve still ends up being 10% A performers, 15% B performers, 50% C performers, and 25% D performers. This results in an almost uniform 33% human capital efficiency. This factor in business creates the single biggest opportunity for increased growth and profits.

One of the most consistent approaches has been to give employees a better understanding of themselves and their behavior and to teach them how to relate to others with different traits or behaviors. Many assessment instruments have been developed and applied in the workplace to help employees and managers better understand themselves and the people with whom they work. These instruments have been somewhat successful. However, the principles on which these instruments are based were developed in the 1920s by psychologists who were contemporaries of Sigmund Freud.

Other elements of assessment instruments relate to the norm group used to test the validity and reliability of the instruments. Many instruments have used college students as the norm group for validation purposes. Others use more diverse populations that don't necessarily reflect the population in the workplace.

The *Core Values Index*, developed by Lynn Ellsworth Taylor, is the first instrument of its kind. It was developed in the fires of business turn-around projects for the purpose of connecting the innate nature of people with the tasks of their jobs. Why? For increased productivity, decreased human capital expenditures, and maximum

business profits. The resulting *Taylor Protocols* prescribe how to put the *CVI* to work. These technologies, plus the new *Employment Pre-Selection Science*, put the objective screening of incoming candidates at the very beginning of the hiring process for the first time. The result for companies that choose to adopt these technologies is higher profitability than has been previously thought possible.

Often employers attribute an employee performance problem to a lack of training. For example, a supervisor or manager who is having morale problems in the work group is often sent to management training. The employer expects this training to “take” and the supervisor/manager will come back from training re-born into a great leader of people. The problem is that we are sending the wrong people to the training classes. We are sending managers who are not “wired” to be managers. We are sending employees whose work habits are not driven by lack of skill or intellection or work ethic. They are simply in the wrong job. Sending people to training to learn skills to do work that is not their “real work” is a lose-lose game.

The reality is that there are often other factors besides a lack of supervisor/management training that may be causing the morale problem. There are many elements in the system that can have an effect, such as the policies and procedures, working conditions, or the work itself. Often the more critical issues are personality-based communication skills, power, and control issues, and the application of inappropriate and ineffective tactics such as intimidation, interrogation, manipulation, and passive-aggressive behavior. If these issues are present, management and worker training is not likely to help. People who are stuck in a wrong job tend to exhibit more of these dysfunctional behaviors than those who are working where they fit best.

Taylor Protocols has learned that putting the right person in the right seat is the single most important task of any business leader. If this is not done correctly, all the training in the world will not produce the desired outcome.

Taylor’s Core Values Index effectively identifies behavioral issues and personal value structures. The first step in all training is to excite a new level of curiosity in the participants. The *Core Values Index* assessment is an excellent tool for this phase of business and personal development.

Often in the course of conducting a needs assessment or otherwise analyzing the workplace, it may be determined that there is a mismatch between the work employees are performing and their capabilities, aptitudes, or desires. When this misalignment occurs, performance outcome is less than optimal. But fixing a wrong assignment by analysis of skills and capabilities does not often solve the problem.

The remedy for this is to better understand employees through a developmental assessment and align their work with their innate capacities to be a certain kind of contributor, doing a certain kind of work. *The Top Performer Profile™* (TPP™) process, built upon the CVI helps any small or large business, any business owner, manager, or executive to better align right employees with right work.

But why go to this much trouble? Why be concerned with and then develop employees?

Rafer Johnson, the 1962 Olympic Decathlon Gold Medal Winner for the United States said it best: “Employees should be all they can be. Because if they are, the company can be all it can be.”

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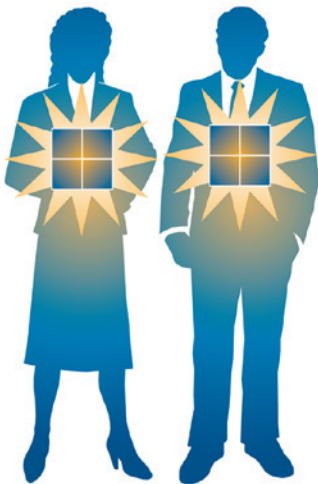
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Before We Begin

The *Core Values Index*[™] (*CVI*[™]) is the only human assessment instrument that characterizes the innate “real” unchanging nature of a person. The *CVI* is the first tool to accurately and reliably quantify (measure) the various *core values* that are inscribed into your innate nature.

Innate Core Values The Unchanging Nature of a Person



Definition:

1. Existing in one from birth; inborn; native.
2. Inherent in the essential character of something.
3. Originating in or arising from the intellect or the constitution of the mind, rather than learned through experience.
4. Unchanging in nature.

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Abraham Maslow called this innate self the unchanging real self, which contains your natural dispensations; your preferred ways of perceiving, feeling, reasoning, deciding, and participating in your society. He proposed that your innate nature is unchanging from childhood until death. Maslow's central conclusion was that it is this unique self, this real you, that inscribes where in this world you fit best.

At *Taylor Protocols* we have learned that this innate nature is indeed unchanging since we have performed multiple test/retest studies and typically achieve a 94% or greater repeat score reliability. This extraordinary level of reliability can only be achieved if we have an accurate assessment, and then, only if we are measuring something that is very stable itself.

We have also demonstrated that the combination of *who you are* (the innate unchanging self) and *what you are* (your personality, skills, competencies, and talents) prescribe where you will find work that is fully engaging, and ultimately fulfilling; work that causes you to get into the flow of things as you perform the tasks required to make the contributions inherent in your job.

This leads to working with a sense of purpose, being fully engaged in work, doing work that utilizes your most important personal talents and skills. This work puts into service your greatest learning. And, in the performance of this work, you are called upon to learn your next most essential lesson about *who you are*. As you perform this work, you refine your skills and talents in the performance of your present job so you can make a greater contribution in the future.

This *Core Values Handbook* is the primary manual for learning about *the Core Values Index (CVI)*, which is used to discover *who you are*. This handbook also describes how the *CVI* scores are used to support personal development and development of leadership skills in one's self and in others, and how to develop effective teams of people. You will learn how to consistently acquire new top performers, resolve conflicts, and more.

The *CVI* is the primary tool used in our revolutionary *Employment Pre-Selection Science*[™]. This new mode of hiring is made possible by the *CVI* in combination with a set of scientific image processing algorithms that were

initially used in medical diagnostic imaging procedures, and later in speech recognition systems for the personal computer markets.

These tools provide a level of scientific information that, for the first time, allows companies to put the objective screening of candidates for employment into the very front of the hiring process. This dramatically reduces the costs of the hiring process, and shifts the performance bell curve significantly in the favor of higher human productivity and personal satisfaction, while delivering significantly greater profits to businesses.

Once you have digested the information in this handbook, you will be prepared to use the *CVI* for development of groups of people who are incorporated together; positioning and commissioning everyone in a given company to create greater profitability than is generally deemed possible.

After absorbing the information in this handbook, plus the personal information you receive from your personal *CVI* reports, you may want to begin your study of our *Human Operating System*[™] (*HOS*[™]) *Manual* that contains the basic construct, theory, and validations of the *Core Values Index* along with a facilitator's glossary, manual, and detailed logic and descriptions of operating modalities of all the *core values*, natures, and participatory types of contributing individuals.

It is with great enthusiasm that we offer these works, these tools, this pivotal new human assessment and human/business development system to all who are seeking to make greater personal contributions and who are committed to finding higher levels of personal and corporate fulfillment. This new system opens a new era of human productivity through meaningful work.

May you be personally edified by your venture into these new works. May you find a position in life in which you can make your highest and best contribution.

Lynn Ellsworth Taylor
President
Taylor Protocols, Inc.

Author and creator of the *Core Values Index*[™] (*CVI*[™]), and the *Human Operating System*[™] (*HOS*[™]), *The Taylor Protocols*[™], *Employment Pre-Selection Sciences*[™], and www.taylorprotocols.com.

**The following are
Trademarks of Taylor Protocols, Inc.:**

80/20 Protocol[™]
Business Relationship Dynamic[™] (BRD[™])
Catalytic Value[™]
Conflict Resolution Protocol[™] (CRP[™])
Contributor Type[™]
Core Values Assessment[™]
Core Values Index[™] (CVI[™])
Core Values Learning Style[™]
Core Values Nature[™]
Core Values Profile[™]
Core Values Strategy[™]
Employment Pre-Selection[™] (EPS[™])
Employment Pre-Selection Science[™] (EPSS[™])
Human Capital Audit[™] (HCA[™])
Human Capital ROI[™]
Human Operating System[™] (HOS[™])
Ideal Profiles[™]
Real Core Values Nature[™]
Real Core Values Self[™]
Spiritual Core Values[™]
Task Distribution Protocol[™] (TDP[™])
Taylor Protocols[™]
Top Performer Profiles[™] (TPP[™])

1

A Brief History of Business

How the Four Value Sets Got Their Names

In the ancient cultures, as humanity began to move from hunting and gathering to agrarian and trade-based economic societies, four principle types of business practitioners (social contributors) evolved:

Builders

A sturdy, action-oriented group of individuals became specialized in constructing shelters and shops, building roads, pyramids, and bridges. These *builders* also formed the armies, led the expeditions and served as high-energy workers. Their actions constantly created monuments to human

resourcefulness and *power*, such as productive farmlands, new businesses, and strong armies. Because they were *builders*, they acted intuitively, investing their personal energy in activities that promised to yield positive, highly desired results. When a first attempt did not create the success desired, they threw themselves tirelessly against the greatest obstacles, until the obstacles yielded to their personal *power* and energy.



Merchants

Teams of craftsmen, traders, and shop owners specialized in developing new trading relationships, opening new markets, developing crafts and arts, and creating channels through which trade goods could flow. Some of these *merchants* also became the storytellers, poets, musicians, and artists. They led in develop-

ing culture and literature. *Merchants* opened the minds of people to new visions and new opportunities. Because they were *merchants*, they learned about other cultures and remembered and shared the stories of these discovered societies. They inspired others with their visions of what might be accomplished, causing their groups of people to work together, mentoring and nurturing each other for the good of each individual and for the good of the whole.



Innovators

Independent, tenacious individuals became the *innovators*. They specialized in developing new mechanical and technological devices, business processes, and social solutions that allowed *builders*, *bankers*, and *merchants* to continue their forward progress. These *innovators* improved systems of

government and economics and advanced systems of theology, philosophy, and psychology. They devised the systems and mechanisms that hold society together. Because they were *innovators* in their deepest nature, they were never willing to stop thinking and brainstorming and experimenting until incredible new tools and weapons and systems were devised. They provided the *wisdom* and strategies for their society, lifting their fellow citizens to new heights of achievement and security.



Bankers

People who concentrated their energies in learning and gathering *knowledge* became *bankers*. They conserved resources and applied those resources toward projects with the least risk and most opportunity. *Bankers* analyzed the results of all new projects, reported ineffective efforts, affirmed the

reasons for each success, and recorded the history of society. The stability that the *bankers* provided supported the *core values* of others and assured the continuity of different disciplines. Because they were *bankers*, they refused to keep silent when danger was imminent. They proved the presence of danger with their information. They worked to ensure sufficiency and continuity. They learned to do redundant, practical work efficiently, with little wasted motion or energy.

After the *builders* in earliest societies brought home the elephant to feed their village, after the *merchants* told the stories of valor and brilliant strategy, after the *innovators* worked tenaciously to develop new weapons to better protect and feed their people, the *bankers* went out into the dark and gathered the hot breathing coals into the center of the fire pit. They covered them with ashes and laid large logs around the precious embers, banking the fire for the next day's use.



These four business-related names are appropriate *core value* classifications for the *Core Values Index (CVI)* because it was the *core values* in each individual that led them into their occupational pursuits, and it is the same today. *Builders* take action and create results, *merchants* develop relationships and inspire others with their visions of opportunity and promise, *innovators* assess situations and solve problems, and *bankers* garner all important information and manage resources ensuring the safety of their societies.

It is important to remember that *builders* don't just build structures; they often build companies, new sales territories, departments, and financial empires. *Bankers* don't just deal with finances, they can often be found in sales departments, customer service, technical service, and engineering. They are powerful resources when applied correctly in each of these areas. As a general rule, each business function must have the right balance of each of these value-based people in order to achieve optimal results.

There are various historical events that illustrate how people with particular value sets excelled in completing their missions. For example, Marco Polo appeared in history as a *merchant*. He was excited about the opportunity of finding riches and important trade items in the Far East. He painted his vision with words that inspired kings and princes to finance his mission. He set out to establish new trade relations and outposts for supplies, and he discovered access routes to the products of China and the Far East

He fulfilled his mission by discovering the spices of the East, creating relationships with his trading partners, and bringing home new treasures that he sold to fund his next venture. This is the nature and spirit of a *merchant*, whether involved in sales, marketing, finance, agriculture, medicine, or science. Marco Polo appeared to have also been part *builder*. He was not satisfied by simply having the vision, which tends to be more important for *merchants* than producing results. He made the journey himself, and upon this basis he built his trade organization. This attests to some balance of *builder* values, both strategic and practical, in Marco Polo.

Alexander the Great is a great example of a *builder* in history. He commanded armies and used his considerable personal *power* to lead and commanded hundreds of thousands to risk their lives for his purposes. He

succeeded in building the largest empire the world had ever seen by the time he was nineteen years of age. Alexander also had many *innovator* traits, developing strategies for war and governmental processes that stabilized and strengthened his conquered territories.

Johannes Gutenberg appeared in history as an *innovator*. He developed the printing press and overcame the seemingly insurmountable obstacle of developing a method for people to communicate through the printed word. This caused printed materials and the skill of reading to become a ubiquitous part of modern society. His press opened the doors of educational, social, and political evolution. In terms of the *Core Values Index*, Gutenberg's contributions and innovations exemplify those of a top notch *innovator*.

A historical example of a *banker* might be Margaret Mead, the renowned anthropologist who solidified anthropological methodology through a lifetime of research and analytical extrapolation. Some of her primary work included photography of primitive cultures and study of their gender roles and social systems. She wrote several pivotal anthropology books, including: *Coming of Age in Samoa*, *Growing Up in New Guinea*, and *Sex and Temperament in Three Primitive Societies*.

Her accomplishments are those of a solid *banker* who focused her life around gathering, expanding, and preserving *knowledge*. Her passion for detailed analysis appears to have been the cornerstone of her life. She likely was also a strong *innovator*, with patience for prolonged observation and questioning, and a desire to formulate her observations into identified systems and cultures.

At *Taylor Protocols, Inc.*, the company founded upon the *Core Values Index* and its *Human Operating System (HOS)*, we have worked with more than 400 companies and more than 50,000 people to discover and perfect the *CVI™* system. We have created *Top Performer Profiles™ (TPP™)* for more than 1,000 positions across a broad spectrum of industries. We have learned that individuals build their self-respect in alignment with their *core values*. We have also learned that each of us is driven to make a contribution to our society through the exercise of our *Core Values Nature™*—our innate, unchanging *Real Core Values Self™*.

When people are allowed to spend a majority of their day working on tasks that align with their *core values*, they are energetic, motivated, and constantly building self-respect. When they are asked to invest their lives in tasks and processes that do not align with their innate *Core Values Nature*, they either become disruptive and work to change things, or they leave to find a position that will better align with their *core values*.

The power of the *CVI* is its precision in measuring and identifying each individual's *Real Core Values Self*. We know that our *core values* do not change over time the way our behaviors and personalities may change. This new *Core Values Index* provides more fundamental and more directly applicable information about the real, innate nature of a person than any other known assessment system and may, therefore, be used in more business and personal applications. For further understanding of the validation process and reliability studies, plus longitudinal field studies of the *CVI* and the *Taylor Protocols*TM, refer to the *Human Operating System*TM *Manual*.

2

The Taylor Protocols™

Over the course of nineteen years of managing businesses as a hired titular CEO, I completed more than 200 successful business turn-around projects. In order to be successful in this work I had to develop many standardized tools and methodologies. This helped us be more effective and more able to handle several companies, usually eight to ten at the same time. The core of this system development work is centered on the *Core Values Index* and is, all together, called the *Taylor Protocols*.

The *CVI* assessment tool is used to develop *Top Performer Profiles* for some of the leading corporations in the U.S. Hiring is completed by matching an individual's *Core Values Index* with the *Top Performer Profile* for a given position. This process decreases the cost of hiring and reduces turnover by aligning people with jobs that require them to work in alignment with their *core values* most of the workday. The end result is a direct positive impact on the profitability of each company that uses this system.

Later in this book we will describe in detail the *80/20 Protocol™* and its *Top Performer Profile* process that puts everyone in the right seat on the bus. We will tell you about companies that have benefited greatly by implementing this powerful new business development tool. We will also introduce you to the *Task Distribution Protocol™ (TDP™)* that allows businesses to scientifically determine which tasks are most aligned with the *core values* of individuals in a given job. After you put people in the right seat you can often double their productive output by redistributing non-aligned tasks to others or through automation.

On the individual level, the knowledge of one's own *Core Values Nature* is essential in making decisions, developing relationships, resolving conflict, and optimizing specific performance. These *Taylor Protocols* systems and methodologies presented in this book comprise a new framework within which companies and individuals can experience constant improvement.

There is no greater contributor to happiness and fulfillment than the alignment of one's *core values* to every aspect of life. There is no greater contributor of profit and continued business success than the *Taylor Protocols*, which are founded on the principle of aligning the unchanging nature of people with the tasks they are asked to do in order to make the contributions inherent in the job they are hired to do.

People invest *who they are*, their *Real Core Values Self*, through the use of skills, talents, and competencies. They invest *what they are*, their experience, skills, intelligence, and talents into the companies that employ them. Those companies that learn how to align these innate *core values* with the tasks of each person's job, gain an unbeatable competitive advantage and profitability beyond that which is generally accepted as possible.

The Taylor Protocols Include:

80/20 Protocol™

Puts every person in the right seat, with its *Top Performer Profile™* process, causing people to make their highest and best contributions. This protocol also includes the *Human Capital Audit™* and a musical chairs repositioning process we call our *Core Values Alignment Protocol™*.

Task Distribution Protocol™

Distributes tasks to people in alignment with their unique *Core Values Nature*.

Conflict Resolution Protocol™

Helps employees and their managers understand each other better, with prescribed tools and tactics for each participant to help them shift from an unworkable position to an effective *core values*-based mode of communication.

Business Relationship Dynamic™

Compares the *Core Values Index* of two individuals and provides a guided discussion to enhance communications and build effective working relationships.

Note: These *Taylor Protocols™* are described in more detail in the *Human Operating System™ Manual* and on the *Taylor Protocols* website, www.taylorprotocols.com.

3

Three Basic Propositions

1. All business problems are people problems.

All solutions to business challenges are people-based solutions. Is insufficient cash flow a financial problem? Yes. But, is insufficient cash flow caused by a lack of planning? Yes. Poor sales training? Yes. Over-active purchasing departments? Greed? Fear of failure? Fear of success? Yes. Yes. Yes. Yes. Cash flow problems are not simply financial problems; they are leadership problems, organizational problems—people problems.

Business problems are *core values* challenges and comfort level challenges. I believe that the keys to success in business are mostly comprised of the leader's ability to stretch outside of his or her emotional and social comfort zones in order to make new effective decisions. The challenges reside in decisions with conundrums like: How much push is too much? How demanding should I be? Is this a time for compassion and patience, or for a swift kick in the derrière?

In my thirty years of business leadership, I've heard various phrases spoken by prospective clients that identify these types of people problems. One potential client said, "All I need is \$500,000 to get me through this time." Another potential client asserted, "When I get the

**Every
business problem
is a
people problem.**

next big exciting contract I'll..." I've even heard, "If I could just find a bank that wasn't so stuck back in the fifties..." Every time I hear these kinds of "if only" scenarios, I realize I am sitting across from a prospective client, one who will be required to face personal change and who must learn how to be a change agent within his own team.

An equally telling list of rationalizations comes out like this: "I can't seem to get *these* people to realize..." or "I'm putting in eighteen-hour days, but..." or "We're like one big *family* here." These types of excuses indicate a lack of boundaries, rude behavior, friction in the ranks, and unmotivated leaders and followers. These are people problems of the worst kind, the kind that steal energy away from accomplishing goals and completing projects.


Since a large part of my job is helping business leaders and their teams understand the truth about their situations, I begin every client relationship by having each of my client's employees take the *Core Values Index* assessment. Doing this helps me instill accountability for the successes and failures of each employee.

2. What we don't know about ourselves controls our lives.

It is the habits, thoughts, ideas, beliefs, and fears that each of us has in us that we have not faced, or that we are not

aware of in our lives, that dictate our actions and responses. Why? Because we can only make conscious choices about things we are conscious of. If we are not aware of a specific fear, we cannot decide to master it.

It also helps each participant understand what his or her role is, or what it should be, so he or she can achieve success as an individual and as a team member. In order to achieve this success, all employees and managers



**What
I don't know
about myself
controls my life.**

must understand *who they are* and *what they are*, at the innate values level. The challenge then is to give each person a job assignment that aligns with his or her *Core Values Nature*.

If we are not conscious of a negative attitude that is limiting our performance, we are not able to decide to think differently. If we don't learn to think and believe differently, we will not act differently, and we will never get different results. If we cannot see and appreciate the different *Core Values Nature* of others, we cannot make adult adjustments in our communications, interactions, and participation with others.

What we don't know about ourselves limits our ability to work with others in a team and frustrates us in our desire to move forward. We have to continuously increase the understanding of our basic nature and the behaviors that we practice, due to our *innate values*, in order to be successful and find fulfillment in our work.


We must also become aware of the personality/fear-based reactions that we rely upon and that we have well-rationalized in our adult life. These patterns of behavior, our learned adaptive behaviors, represent only a warped version of our *Real Core Values Nature*TM. Learning to see this, and learning how to make more conscious choices about our reactions to certain kinds of people in certain kinds of circumstances, provides a whole new world of conscious choices. This is the personal development purpose and contribution of the *Core Values Index*.

3. **What we don't know about the people around us dictates the success of our business teams.**

Some of us are reasonably self-aware. But if we don't know and sufficiently understand the people we interact with in the workplace, our communications will falter. Our goals and objectives will be overshadowed by battles for control. General misunderstandings will reduce productivity in our team. If we can't learn to change our personal strategies to fit the situations and the people involved, our success will continue to be limited.

The ability to shift from one *core value* communication style to another that better serves the person we are communicating with, is a skill that delivers immeasurable

improvement in effectiveness for both parties. If we can understand that others learn differently than we do, that others think differently, observe through different filters, participate with different motivations, act from different impulses, contribute different energy, hold different perspectives, are wired from birth with different essential modes of operation this understanding will create a new foundation for personal achievement and success.



**What we
don't know about
people around us
dictates the
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business teams.**

Summary of the Basic Propositions

These three basic propositions must be understood and accepted as absolutes, or we leave ourselves vulnerable to blaming our lack of success on circumstance or upon the people we can't control. If we accept the fact that current frustrations and failures are due to our lack of understanding of ourselves, our teams, and the people with whom we must relate, we can turn immediately from frustration, fear, and accusation, and begin to solve the problems in front of us.

How is this done? First, if you haven't already, take the *Core Values Index*, available on the Internet at www.taylorprotocols.com and discover your innate *Real Core Values Nature*. Discover how you naturally contribute to a team, the impositions you bring to your teams, as well as your positive and your negative behavior cycles. Then, begin with the next chapter to increase your understanding of how to use this powerful new knowledge to improve your personal performance and the performance of your company.

In order to gain the most from this new system, it is important to shift from thinking about the *Core Values Index* as just another personality test, and let it lead you into a deeper understanding of your deepest, most intrinsic, and unchanging nature.

This information is not about your adapted personality, it is about your basic spiritual nature, your innate identity and deepest dispensations; how and why you choose to experience life, how you are motivated by your very nature to BE in the room, at work, and with the people who participate in your social life.

4

Why We Act the Way We Do

Each of us is geared to view the world from a different perspective and to participate differently in the world. These basic gears are driven by our innate unchanging values. They focus our energies in certain directions, cause us to see and judge the world in different ways, and result in different kinds of strategies for similar situations. We are motivated to act the way we do because we are geared to act that way by our innate *Core Values Nature*™.

As adaptive creatures we also learn to rely more on one set of values than another, either due to the success and comfort that has come to us through this strategy, or by adapting different strategies, shifting to different a *Core Value Strategy*™ in response to negative emotions and fear of harm.

We become slightly or significantly warped away from our most natural self. This is caused by the responses we attract to ourselves in our early attempts to live life the way we were geared to live it in an environment that is controlled by the older people upon whom we are dependent as children.

We call this the “environmental warping of natural dispensation.” In other words, we all get a little warped by our childhood experiences. When the actions and strategies of one of our value sets is encouraged by parents, teachers, and siblings, we learn to rely more on that value set, whether it is our dominant, secondary, or minor value set.

When our actions that arise from one of our *core values* elicit negative responses, emotional pain, or abuse, we learn to shift into a different *Core Value Strategy* for safety and acceptance.

This doesn't change who we are; it changes only our willingness to live the way we are geared to live in certain situations. These adjustments to our basic dispensations warp us into a fear-based personality. It is at the behavioral and personality level that psychometric profile systems historically work. The *Core Values Index* develops a clear picture of each person's *Real Core Values Self*, a unique recipe of *Spiritual Core Values*TM.

We have, each one of us, an essential inner nature which is instinctive, intrinsic, given, natural, i.e., with an appreciable hereditary determinant, and which tends to strongly persist.... This inner core shows itself as natural inclinations, propensities, or inner bent. That authentic selfhood can be defined in part by knowing what one is fit for and not fit for.

Abraham Maslow

The *Core Values Index* creates an accurate picture of each person's *Core Values Nature*, which includes a unique set of strategic and tactical values that align with one of the four *core values*: *power, love, wisdom, and knowledge*. Refer to the *Human Operating System*TM *Manual* for definitions and more detailed descriptions.

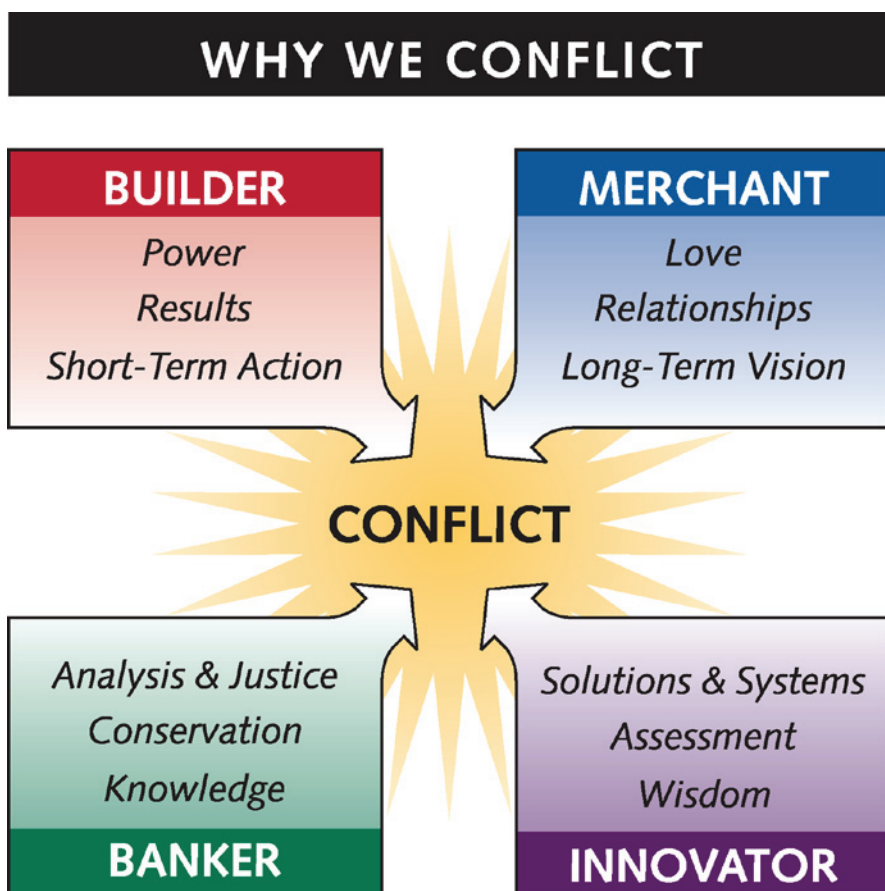
Most people have values that align more with two of the *core values* than with the other *core values*. We call these preferred values our dominant and secondary *core values*. We call the third level value the tertiary and the fourth level the minor *core value*.

We have found that most people operate most of the time in alignment with their dominant and secondary values. This is the part of their person in which they carry the most emotional commitment, the part that prescribes how they are geared to generate their successes.

As a general rule, the closer a person comes to holding equal value in all four quadrants, the more likely he is to exhibit behavioral characteristics founded in all four *core values*.

If your dominant and secondary values are close in number, i.e., *merchant* 23, *banker* 22, you likely operate from both perspectives about half the time. We have found, however, that when conflicts arise and the chips are down and anxiety has given way to fear, most people revert to the negative conflict strategy of their dominant *core value*. They exhibit the negative traits that are associated with that *core value*.

We each tend to use the conflict strategy of our dominant *core value* as our first response to a fearful situation.



There are two questions that can further cement your understanding of your dominant value:

1. Which conflict strategy do I most often use?
Intimidation, manipulation, inquisition, or aloof judgment?
2. Which success strategy has caused me the greatest pain and emotional duress? *Action/results, vision/relationships, assessment/problem-solving, or information/conservation?*

This second question may require a little intellectual struggle and conversations with a few friends or work colleagues. The reality of this principle is that our strengths also become our weaknesses at times and cause us pain. This is based on the fact that we get comfortable using our most dominant *Core Value Strategies*.

We get so comfortable that we continue to operate from this motivational perspective, even when the actions and behaviors are not as effective as might be desired. Sometimes these usually good strategies are not only ineffective but destructive to our self and to others.

Since we usually start and end with these dominant *Core Value Strategies* in almost every situation, it is understandable that there are times when our preferred strategies are not the most effective choice of thinking and behaving. But we are emotionally committed to them and feel safer using these most familiar strategies.

By continuing to operate ineffectively in some situations with our dominant *Core Value Strategies*, we create confusion, ineffectiveness, and conflict, sometimes creating pain and discomfort for ourselves and others.

If we persist in this course of action, we may become anxious that we are not going to get what we want, or that we may fail, or that we may lose something that is important to us, or that someone might become very upset with us.

When our anxiety turns to fear, we shift from the positive reliance upon

our dominant *core value* to reliance upon the negative conflict strategy of that *core value*, transitioning from positive contribution to destructive, self-protective behavior. This is not a happy transition for us, and certainly not for those around us.

People often describe this experience of shifting into their negative *core values* conflict style as the feeling of "...being beside myself." I see this as an excellent way of describing the situation.

I no longer feel comfortable and safe being who I really am, so I shift into an alternate manner of participation, that feels just like what it is; my real innate positive nature is set aside and the adapted personality self is brought forward to deal with the situation. I am literally beside myself in the psychological sense.

It takes courage and at least a little willingness to explore these issues in order to benefit from this knowledge, but the rewards are tremendous. By truthfully answering the two questions above, you will affirm for yourself which of your *core values* is dominant and which is secondary, and so on.

This *CVI* construct is used by thousands of people for communications purposes. The reality is that each of us is unique. Yet we share many common traits. In order to help each of us gain a clear picture of ourselves the *Core Values Index* defines twelve types of behavior based upon six primary *Contributor Types*TM.

These are described in later chapters in this book. You will find yourself described mostly in your dominant/secondary *Contributor Type*, but some of your qualities will be found in the other *Contributor Types* as well.

<p style="text-align: center;">Builder</p> <p>CORE VALUE Power (Personal energy invested to make a positive difference.)</p> <p>Catalyzed by Faith (I know what to do now; I will know what to do next. My power is sufficient.)</p> <p>Contributions to Team Action Results</p> <p>Conflict Strategy Intimidate</p> <p>Learning Styles Decide and Do</p>	<p style="text-align: center;">Merchant</p> <p>CORE VALUE Love (Working toward an inspired vision of what can be by nurturing the core values in one's self and in others.)</p> <p>Catalyzed by Truth (The way things are.)</p> <p>Contributions to Team Relationships Vision</p> <p>Conflict Strategy Manipulate</p> <p>Learning Styles Talk and Listen</p>
<p style="text-align: center;">Banker</p> <p>CORE VALUE Knowledge (Knowing the facts through research, measurement, proof, and records.)</p> <p>Catalyzed by Justice (Ensuring the equity of access, accountability, compensation, and opportunity.)</p> <p>Contributions to Team Conservation Information</p> <p>Conflict Strategy Aloof Judgment</p> <p>Learning Styles Read and Analyze</p>	<p style="text-align: center;">Innovator</p> <p>CORE VALUE Wisdom (Seeing the way things are and discerning what to do about it.)</p> <p>Catalyzed by Compassion (Remaining empathetic and curious regardless of the behavior and emotions of others.)</p> <p>Contributions to Team Assessment Solutions</p> <p>Conflict Strategy Interrogate</p> <p>Learning Styles Assess and Solve</p>

5

The Four Basic Core Values

In my work as a business management consultant, I use every effective tool I can find to understand how to unlock the potential and release the energy in struggling and dynamic growth companies. These tools uncover better uses of financial resources by achieving better applications of people and by attaining new levels of growth and success.

One of the tools I've used most successfully is the *Core Values Index*. This revolutionary assessment is extremely useful for business owners, business managers and their teams. The *Core Values Index* divines the unique nature of each person, a unique blend of innate unchanging *core values*. We also learn from this powerful assessment each person's predisposition to make a unique blend of six types of contributions.

The *Core Values Index* was designed specifically for contemporary business. The four *Core Values Natures* (*builders, merchants, innovators, and bankers*) were derived from the early civilizations that arose from the hunting and gathering cultures. These different social roles are ascribed by the different values people place on actions and results, relationships and vision, assessments and solutions, and, finally, information and conservation.

The *CVI* is comprised of 36 sets of four strategic and tactical values. Each one of the strategic and tactical values is aligned with one of the *core values*. By requiring participants to choose two out of every four strategic and tactical values, we derive a preferential score for each of the innate *core*

values. This method of using values to uncover deeper values has many advantages.

1. There are no negative words or choices that might encourage a person to select false choices in order to hide weaknesses.
2. There is no discernible context and no discernible pattern that might allow a person to create a false positive picture.
3. There are no confusing questions or redundant questions that are obviously designed to uncover levels of honesty in the participant. These kinds of questions in other types of assessments encourage false answers.
4. It takes most people less than ten minutes to complete the *CVI*, so the choices they make tend to be intuitive, linking into the subconscious mind.

The result of these advantages is a *Core Values Index* that yields an accurate picture of the deepest unchanging nature of the person. The *CVI* has proven to be highly reliable, yielding greater than 94% repeat test consistency. This illustrates that the *CVI* is accurate and reliable. More important, the *CVI* must be measuring something that is, in itself, unchanging or such consistency would not be possible.

These factors have allowed us to use the *CVI* to build highly reliable *Top Performer Profiles*. So we are also able to use the *CVI* as a true pre-selection employment screening tool that is moved from the classical point of use—just before the final decisions to hire. We put the *CVI* in the first position, before a resume is read, before any contact is made, before any interview.

By moving the *CVI* into a true pre-selection position, we keep hiring managers and human resource recruiters from filtering future top performers out, and future low performers in. We have deferred subjective judgments to the end of the process mitigating their inappropriate influence. This effectively eliminates the common declaration of chagrin, the common question that often occurs several weeks after a new hire is made: “What happened to the person I interviewed?”

The thousands of people who have experienced the *CVI* assessment found this tool to provide the “best picture of the real me.” Our further repeat test analysis of *CVI* participants found the *CVI* to be reliable, meaning the *Core Values Nature* that was revealed by completing the *CVI* the first time remains essentially the same year after year. This accuracy and reliability makes this assessment tool revolutionary in its precision and in the breadth of its appropriate applications for individual and organizational development.

What Is Your Innate Unchanging Core Values Nature?

Generally, you will find that you are strongly inclined toward one *Core Value Strategy* with a second *core value* also being a very important part of your makeup. You may communicate or express your strategy style and *Core Values Nature* best by saying you are an intuitive contributor or *innovator/banker* or practical contributor, etc. It is generally more effective to state your dominant *core value* first, and your secondary style last, i.e., “I am a *merchant/innovator* with strong *builder* values and low *banker* values.”

Another way to talk about this innate nature is to think of yourself as a unique recipe of energies—that you have a capacity for different kinds of life energy. It’s hard to find a way to express this well, and everyone may hear each attempt at defining this innate self in a different way. That’s partly caused by what we know is true. We each have a unique filter through which we view life, and we each have a different perspective and a different sense of purpose, a different capacity to be a certain kind of presence in our world.

The nature of this difference also causes each of us to perceive these realities differently, to understanding in different ways, and to language our understanding differently. The attempt we are making with the *Core Values Index* and its various applications and business tools, is to provide one central backbone upon which we can all hang our collective philosophical and psychological hats.

Each individual is gifted with this unique charge of energy, for the purpose of expressing that energy through work, play, music, relationships, and just plain being alive. I often talk to my clients about their motivation to be a certain kind of “presence in the room.” This is the simplest and

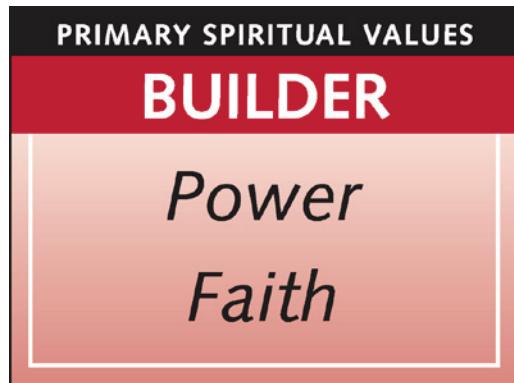
cleanest way I have found to talk about the nature and reality of our deepest innate self. The following descriptions of the four *core values* will take you into a deeper understanding of yourself and the *Human Operating System* that governs each of us differently.

Some individuals have almost perfectly equal preference or innate capacity for all four *core values*, some individuals will have strong innate capacities for three of the *core values*, and some individuals will show preference strongly only for one profoundly dominant *core value*. Since this relates to a small minority of persons, if this is true for you, please refer to the *Human Operating System Manual* for further information regarding your unique *Core Values Nature*.

The Four Basic Core Values

Builder Core Value Power catalyzed by Faith.

Builders are a well-respected group of people, powerful in scope of work, leaders in creating lasting monuments for themselves and their businesses. *Builders* act, make decisions, and drive toward results. They take the aspirations of the *merchants*, the ideas of the *innovators*, and the facts from the *bankers* and through the application of personal energy produce results. *Builders* lead by example and by command. Their style is to take immediate action and apply their personal energy to create a desired result.



Merchant Core Value Love catalyzed by Truth.

Merchants are relationship people. They value relationships with other people and with all things. This causes them to pay attention to the way people feel and think and talk and act. It also causes them to be attuned to aesthetics and beauty, to words, poetry, and music. But more than this, they are the risk takers, visionaries, and the traders opening new markets and all kinds of exchanges between individuals and societies. They see endless opportunity and constant possibilities. They foster the pursuit of wealth, art, and beauty. *Merchants* motivate and inspire *builders*, *innovators*, and *bankers*. *Merchants* are team builders and deal makers. They lead through inspiration and excitement. They ask others to help them achieve their unique vision. Their strategy is to attract others to their visions and to nurture the *core values* in themselves and in others.



Innovator Core Value Wisdom catalyzed by Compassion.

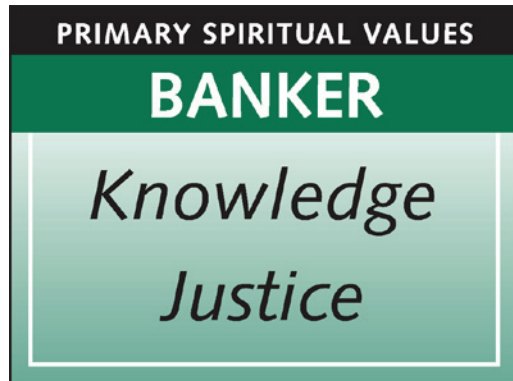
Innovators constantly add to society with their ability to solve problems and to observe and understand situations, striving toward effective solutions. When others around them claim, “It can’t be done,” *innovators* come up with a possibility and ask, “What if?” *Innovators* keep projects rolling by providing alternative solutions for *builders*, *merchants*, and *bankers*. *Innovators* always find a better way.



They lead through brainstorming, innovation, and strategic thinking, and through the provision of effective strategies. They lead by questioning and by providing critical answers for critical situations. Their strategy is to hold back, observing everything, always working toward a personal understanding of a given situation or problem. From this place of understanding, they are able to provide wise solutions, effective strategies.

Banker Core Value Knowledge catalyzed by Justice.

Bankers gain and preserve *knowledge*. They take personal responsibility for collecting and preserving the most important resources of their society. They assimilate all available data whatever their field of endeavor. They organize thought and information so others can know what needs to be known in order to be more effective. They challenge the viability of new directions by showing past successes and failures. They keep balance in the system. *Bankers* keep *merchants*, *builders*, and *innovators* from unreasonable risk. *Bankers* conserve, analyze, and inform. *Bankers* work hard for justice and appropriate behavior. Their strategy is to constantly gather *knowledge* so, when the time comes, they will have the answer, and they will be able to inform others.



A Simple Picture of the Core Values Human Operating System™

We all have a unique blend of these *core values* and are able to utilize a variety of these strategies when things are going well. But when our backs are against the wall, or when we run up against people with different values that surprise us, we collapse back into the emotional and fear-based tactics that

come naturally to us due to our specific *Core Values Nature*. We will almost always revert to our dominant *Core Value Strategy* and to its most negative, least effective strategies in these instances. This is generally true despite all of our individual adaptation into a warped personality version of our *Real Core Values Self*.

When using the *Core Values Index* as a tool for personal development, it is important to understand that our goal is not to change who we are relative to our *core values*. These appear to be, according to Dr. Maslow, a hereditarily fixed part of our innate identity. It is not our goal, then, to overcome who we are, but to learn how to be all that we innately are. Our collective challenge is to un-warp away from our adapted personalities and learn to consciously make choices based upon our innately imbued *Core Values Nature*.

The goal is to know the values we hold in each part of our *Core Values Nature*, to understand the various strategies that derive from these *core values*, to decide consciously which *Core Value Strategy* will be most effective in the current situation.

Remember, when you took the *Core Values Index*, in order to choose the few strategic and tactical values that you chose in your minor (least dominant) value set, you had to prefer those values over the alternative values that were offered. The alternatives were by definition part of your more strongly held innate *core values*. Still, you knew instinctively that those minor values were an important part of who you are.

So, in other words, you have just as much commitment to the strategic and tactical values you selected in your weakest *core values* quadrant as you do to the strategic values you selected in your dominant and secondary quadrants. The goal is to learn to shift from one *Core Value Strategy* to another more effective strategy consciously, intentionally. We knew how to do this as children. That's how we warped ourselves away from our innate unchanging nature, into an adapted personality.

It is essential to understand our individual *core values* and the *Core Value Strategies* inherent in them. This knowledge allows us to evolve more quickly and effectively toward a fully actualized self, while also relating better with others. This makes us more effective in getting what we want.

We are better able to increase agreement with others who can contribute to our success. All of this ensures our ability to excel in business and in our personal endeavors.

Regardless of the makeup of your own Core Values Nature, it is essential that each company and each department within a company possess the appropriate balance of the competencies in each core value. If a team is lacking in any essential value, then the potential strengths of this team cannot be fully realized.

In fact, if a team remains inappropriately unbalanced for too long, the existing strengths will become weaknesses, and the business will suffer accordingly. In business, as in our personal development, there is seldom a benefit to having a perfect balance among the value sets. It is almost always preferable to have stronger leadership in one or more of the core values, with appropriate support from the other core value strategies.

The success of any business manager is based upon this ability to create the appropriate balance of *core values* within his or her company and to appropriately focus the people with each *core value* toward the tasks they are most likely to perform well. Achieving this “right balance of *core values*” is a significant challenge. Each business has unique *core value* requirements, not only for the business as a whole, but within its different departments as well. Every individual functional position also has its own unique requirement for a right blend of essential *core values*.

For instance, in a general recruiting firm, persons with a significant amount of *builder* energy balanced by *merchant* values are required to open new accounts. The *banker* values for these new account openers should also be substantial so they are willing to do the repetitive calling and appropriate follow-up required to open doors and close sales. And the right mix of *innovator* values is critical so smart questions will be asked, client needs will be assessed appropriately, and good connections between needs and product offerings will be made.

The secret to consistent success is being aware of and understanding the various strengths and weaknesses of the four *core values*. This knowledge will help the manager put balanced and prosperous teams together and dramatically improve the over-all productivity and profitability of any part of any company.

6

Builder Core Values

Power catalyzed by Faith

A *builder's* primary *core value* is *power*. *Power* is personal energy invested to make a positive difference. A *builder* makes a positive contribution by being effective and by achieving results. *Builders* use straight-forward speech and bottom-line thinking. They look for quick, simple approaches that allow them to intuitively decide, step ahead, and lead others into action.

The *power* of a *builder* inspires action in others; it gives them a sense of well-being and confidence. When a *builder* is purposefully charged with a short-term mission, he creates an irresistible force, visible activity. The presence of this constructive *power* in any organization produces visible and measurable results.

Power helps *builders* contribute to the team. *Power* provides them with their decisiveness and spontaneity, which is important for short-term projects. *Power* gives them emotional strength that inspires their teams to never give up. Since urgency is a prime motivator, and *power* itself expends little conversation, you may find them impatiently answering questions or commanding others somewhat abruptly to perform.

These behaviors as well as many others are due to the *builder's core value, power*. The *builder's* propensity to take action in alignment with *power*-based strategies influences every decision, judgment, and action that they take. When *power* is the motivation, the attention of the *builder* is not on relationships and feelings, not on observation and assessment, not on low risk and data collection, or even an effective slue of resources—the attention is

on throwing all personal energy into a task to make something significant happen.

The *builder's* self-respect is founded in the tangible evidence of applied personal *power*. Their self-worth will deflate only when they feel powerless, when they are not allowed to act, or when they perceive that their personal *power* is not currently being valued or applied to worthy tasks.

Catalytic Value—Faith

The *Catalytic Value* of the *builder* is *faith*. *Faith* is the intuitive trust that I know what to do now, and I will know what to do next. My *power* is sufficient.

For *builders*, *faith* is having confidence in knowing what to do intuitively, now, and trusting that they will know what to do after they make the world a different place through their present and future actions. This is why we call *faith* the *Catalytic Value* for the *power*-based person.

When *builders* lose their strong sense of *faith*, the *builder's* negative cycle begins. When a *builder's* sense of personal *power* is undermined they cannot act. They cannot continue to invest their *power* unless they have a healthy sense of *faith*. Their self-respect begins to wane. They begin to experience anxiety, still trying harder to use *power* to make things happen.

This loss of *faith* operates for the *builder* like the dimmer switch on your dining room wall. As the experience of intuitive *faith* is lost, the amount of *power* that is released into the room is automatically, unconsciously decreased.

When reliance upon *power* is proven to be ineffective, *power*-based people slip from a feeling of anxiety into an overpowering fear that maybe they are really not powerful after all. They lose their sense of *faith* that they actually know intuitively what needs to be done. They begin to fear that they don't know what to do now, or that maybe, after taking the next action, they won't know what to do.

Since this all happens at an intuitive, non-logical level, there is no way for *builders* to truly know whether their *power* is what is needed in the current situation, or whether their *power* will be sufficient. There is only their lost *faith*. The world, it seems to them, can no longer be molded by *power*. But *power* is the strategy they know and trust.

As the feeling of *faith* gets turned down lower and lower by failures or restrictions on one's *power* urges, the faith that personal *power* will be sufficient, or well focused becomes very dim, until no *power* is allowed into the room. This excites the fear of being *powerless*. This brings out the *Intimidator*.

The *builder* intimidator goes into battle willing to risk everything in order to regain control. He threatens, intimidates, physically rises above you, rages, charges through open spaces, and invades anyone's space who defies him. *Builders* try to regain their confidence through escalating their perceived *power*. They expect immediate and absolute compliance and capitulation.

BUILDER: negative traits

- *Pushy*
- *Angry*
- *Frustrated*
- *Gruff*
- *Always Right*
- *Inconsiderate*
- *Overbearing*
- *Arrogant*
- *Bossy*

BUILDER: when we are pushed

Shout

- *Shout*
- *Get Angry*
- *Change Our Minds*
- *Ridicule*
- *Intimidate*
- *Bluster*
- *Stomp Out*
- *Command*
- *Attack*
- *Make You Wrong*
- *Shame You*
- *Point the Finger*
- *Blow Up Friendships*
- *We Overpower You*

These commands and expectations often give the *builder* the illusion of *power*, since others tend to cower under the intimidating assault. The *builder* regains his sense of being in control of the results he is seeking. Slowly he regains his sense of *faith* in his own *power*. The *Intimidation* strategy is an effective conflict strategy much of the time.

Once the sense of *faith* is re-established, the *builder* will immediately return to hard work. He may not recognize or understand the harm that may have been done to a relationship, either temporarily or permanently. He may not realize how much more often he is likely going to be required to use *intimidation* in the future due to his use of *intimidation* today. But for now, his sense of adequate *power* is regained, and he moves forward, trying to make a *powerful* contribution.

So *power*, when misapplied by the *builder* to gain and keep control over others, becomes a sledge hammer applied to a finishing nail. It may drive the nail home, but it can ruin the walls of the house it is meant to help build. Since *power* appears to have a self-sufficient quality, *builders* also tend to be independent and unwilling to rely on others.

Their foundation in *power*, if not balanced by the other cornerstones of *knowledge*, *love*, and *wisdom*, will yield business results for a time; but the experience of success will be spoiled by the absence of a team to share the glory. The unbalanced *builder* may find himself like the marching band leader with no band following behind.

Important. A *builder's* self-respect is mostly dependent upon his or her sense of personal *power*. When *builders* lose their sense of *faith*, when they feel *powerless*, and are not allowed to act, or when they have the perception that their personal *power* is not currently being valued or applied to worthy tasks, only under these circumstances will the *builder* resort to negative strategies.

Builders are just as vulnerable in many situations as people who have the other *core values* as their dominant motivation. That's why they hate so much to admit it. Their vulnerability feels like the opposite of *power* and makes them extremely nervous and fearful.

This same mechanism is at work in each *core value* mode of operation. Remember this dimmer switch mechanism as you read about the other *Core Value Strategies*. Each time the *Catalytic Value* is dimmed into oblivion, the individual's *core value* is lost, and they experience a fear that is the antithesis of their *core value*.

The Spiritual Core Value of Builders

Builders have great faith in their own *power*. *Builders* have no desire to control others, not any more than the other types of *core value* individuals. Their quick intuitive response to almost all circumstances tends to put *builders* in a leading position, and causes others to feel compelled to follow their actions. The intent is to simply get things done, now.

Only *builders* truly identify with *power*, not because they are the only people who do anything but because *builders*, more than any other *core values* type, value action and results before all other primary motivating values.

Builders are the craftsmen, project managers, and risk takers in this world. They commit themselves totally to their assignments and generate respect, expectation, and confidence in others.

Builders will present themselves as workers, commanders, reliable allies, and protectors of others. *Builders* assume whatever role is necessary to help build bridges, win conflicts, and increase the success of all endeavors.

But *builders*, when backed against the wall, or when they feel a decrease in their faith, in their intuitive judgment, may interrupt others and take charge. And once a *builder's* confident and unshakable attitude has been broken they become the most overbearing and uncompromising of the lot. *Builders* generally treat others appropriately and they expect to be treated appropriately, but not with the care and attentiveness that *merchants* would like. When *builders* do not feel confident they may turn to the dark side of *power*.

Builders under pressure will tend to elbow people out of their way. They will take charge and overpower others. They may require absolute compli-

ance to their commands and if compliance is not immediate, they may raise their voices or invade the space of others. They want to set the pace, control the focus of activity, and do one thing after the next.

Merchants, innovators, and bankers are very wary of the *builder* because the idea of doing things just because someone says to do it is not rational or comfortable for them. They have trouble discerning real innocent *power* from the occasional intimidation and push of overly emotional *builders*.

The *Catalytic Value* of *power* people can be seen as the real person who wants to control others. And everyone, even other *builders*, resent the use of intimidation to get compliance. Beware of the *builder* who has decided you are “not worth very much.” They have spent a lifetime learning how to be of value to their society and they are impatient with others who are not willing to work at the pace and with the total commitment they tend to embody.

The *builder* can be the most loyal and self-sacrificing person on the team. But if they feel controlled and thwarted in their efforts to make things happen, or if you make them doubt their own *power* you may experience the feeling of getting into the boxing ring with Mike Tyson. If you are not willing to “take him out,” get out of his space very quickly.

The self-respect of a *builder* is almost entirely based in his or her sense of being the *power* in the room, and being perceived as an undefeatable person.

Builders do not resort to negative strategies unless this sense of potency is threatened, whether the threat is real or imagined. When a *builder* feels impotent or vulnerable, the commitment to acting on faith is tossed away. Unconsciously, the *builder* strategy decides that any means required to regain the sense of limitless *power* is okay.

Our Deepest Fears

The deepest fear associated with each *core value* is the opposite of that *core value*:

Power people fear vulnerability or the sense of being *powerless*, impotent.

It is understandable, that when people lose their sense of being a positive contributing presence, whether that sense of being is one of *power*, *wisdom*, *love*, or *knowledge*, their dark side comes out to protect them. None of us is very attractive or welcome when our fear-based negative *conflict strategy* is employed. These negative *conflict strategies* are designed and generally do cause people to give us what we want, momentary control as a substitute for the more deeply needed sense of usefulness and worth from positive contribution.

The deepest fears are:

Builders—powerless, impotent, vulnerable.

Merchants—hateful, without any real *love* in them.

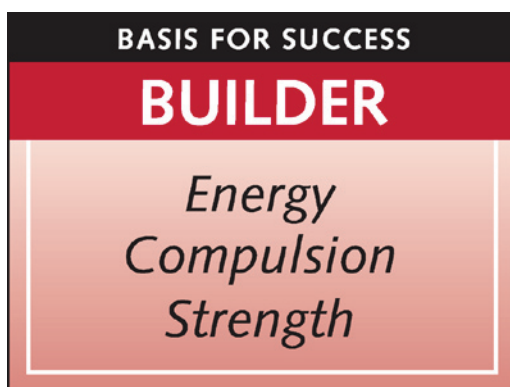
Innovators—a fool, void of any real *wisdom*.

Bankers—ignorant, void of any worthwhile *knowledge*.

Contributions to the Team

A significant percentage of business owners and business leaders are *builders*. They are successful because they get things done. They take personal responsibility. They don't usually make excuses, and they generally get impatient with those who do. They make decisions on the fly and they like it that way. A *builder's* focus is short term, and he is driven by the desire to accomplish the tasks he faces at the current moment.

Builders have an internal drive that allows them to be decisive, to blow through obstacles and make decisions spontaneously. They are constantly turning their energies loose on an identified goal, and they are not willing to accept defeat, at least not gracefully.



This use of irresistible force allows *builders* to work extremely well with *innovators*, as long as the *builder* is the boss. When a *builder* needs a solution to a complex problem, an *innovator* will tenaciously work to find it. This frees the *builder* to continue working, applying his *power* to known tasks.

He trusts that the *innovator* in his group will provide a right strategy for the next project. Once the *innovator* puts the solution into the *builder's* hands, the *builder* will implement the necessary steps to achieve the solution and obtain its benefits. This type of supportive *innovator* relationship feeds the *builder's* personal needs very well.

Scenario One

Harold owns a 100-year-old family business along with his cousin, Tyler. Harold is a strong Builder. He is hard-working, to-the-point, and always ready to tackle difficult situations and new opportunity. As a Builder, Harold likes to make quick decisions, cause immediate change, and create a positive result.

On his own he would accept and start too many projects within his company, make too many changes too quickly, and overwhelm his 200 employees with constant demand for adjustments and changes of direction.

His Innovator/Banker cousin provides an important and essential ingredient. Tyler is slower to act, more observant, and more sensitive to the systems and processes already in place. In fact, Tyler created most of these systems and he honors them. So Tyler holds his ground against Harold's powerful forward charge.

Tyler steps back and looks at the large complex picture and makes a thoughtful assessment that includes all available evidence. Honoring the Innovator's prime directive to provide wisdom to the situation, Tyler develops a well-conceived strategy that incorporates each new project in an appropriate and digestible manner. His Banker values also help Tyler to say "no" to projects that cause too much disruption and produce too little reward for too great a risk.

Scenario Two

A profound Innovator was president of a medical technology business. This creative leader (call him Brent) was so much into his Innovator values

that he spent nearly 100% of his long work hours developing new software. He was about to lose his company due to low sales and high expenses.

With strong directive guidance from the Taylor Protocols team, Brent was able to find a dominant Builder/Innovator to take over as president and COO. The president subsequently hired a strong Intuitive Contributor to build the sales team.

Within eighteen months, this small company increased its sales from \$1 million to \$3.6 million; the company was well on its way to completion of a new product. Brent was free to develop his concepts while his new Builder-led team worked to build the company.

By allowing themselves to be balanced and guided by people with *innovator*, *merchant*, and *banker* values, strong *builders* become highly focused on well-prioritized strategic projects. Their considerable *power* is made greater by their contributing, sometimes restraining, team.

Impositions to the Team

The first weakness of *builders* is that they often try to do everything themselves. They are so focused on getting tasks done right now that they can be too impatient. They tell others what they should do and how they should do it. Because they value action and results above all other business factors, their mode of teaching can be to usher people out of the way, take the task at hand and say, “Just watch me do it.” They then leave and expect their “student” to be as proficient at the task as they are, which is not usually the case.

This is where *builders* run into trouble with *bankers*. Since *bankers* are risk averse and want to know all the facts before proceeding with a project, the two often butt heads. *Bankers* need to know precisely what action to take, and *builders* are unable (not willing to slow down enough) to explain this. It is a difficult chore for *builders* to take time away from their current project to instruct or to answer questions. “Just watch me and learn,” is the attitude if not the actual statement of *builders* under this pressure for more clarification and explanation.

Time is of such importance to *builders* that they are not much attuned toward reading the reactions and needs of others. They are very decisive and trust their own judgment explicitly. Other people's views are rarely considered to be as important to a *builder* as his own gut instinct, particularly when he is on a mission to get a project completed.

Because of their drive to finish a task, *builders* may blow up relationships. This is especially likely to happen with *merchants* who value teamwork and rapport. *Merchants* often interpret *builder* abruptness and heads-down activity as rudeness and arrogance. This is a bias that exists in the *merchant's* love-based perspective, one that *builders* need to be aware of and one they need to learn to accommodate.

A strong *builder* needs *merchant* energy around to keep relationship balance in the system, multiplying the *builder's* energy with people who want to help with the work.

Lack of personal consideration makes the *builder* intimidating even when they have no desire to intimidate. In fact, *intimidation* is the *builder's* primary negative way of regaining control of any situation. If their *power* is not sufficient to cause the necessary action to get the desired results, they may resort to anger, accusations, hostility, arm waving, stomping, and threatening—*intimidation*.

When *builders* are frustrated with lack of results, their sense of personal *power* is threatened; they have a tendency to shift from positive personal effort into some form of intimidating control.

Another challenge *builders* impose on the team is that they often confuse taking an action with getting a result. *Builders* tend to be very practical and bottom line oriented. However, when it comes to their own performance, they may be so concerned with taking any action in order to accomplish their short-term goal that they forget what their long-term mission is.

Once *builders* take an action, once they experience their energy, they feel charged and ready for the next task. There is no requirement from the *power* perspective to prioritize tasks. All action is valued, even if the results

are not the most important results for the moment.

This urge to act and move on often causes *builders* to overlook detail, which is a key element in measuring effectiveness and results. This infuriates *bankers* who want to know all the facts before proceeding, which causes conflict between the two.

Scenario Three

Joseph owns a five-million-dollar high technology company. He has been successful in obtaining contracts with the government, and his business has been quite profitable much of the time. However, after twenty years in business, he seems to have reached a dramatic plateau. Actually, it was reached six years ago, but he is just now admitting that he could use some help to rise above what feels like a hard ceiling.

Joseph can be seen many times each day charging out of his office on a mission. His method of leadership is to command. He has had a thought, and he is looking for someone to take that thought and act on it.

When he finds a likely candidate, he is not likely to request their attention, he demands it. He seldom waits while his target finishes a phone call or a conversation or even a sentence on the computer. He begins speaking sometimes before he enters his target's office.

Joseph's sales director is a profound merchant who carefully builds relationships and brings them to the company for new business. One particular potential customer had strung Joseph's company out for more than six months with promises to buy product, to sign contracts, and to deliver advance deposits.

Joseph became so exasperated with the situation that he demanded this customer's file from his sales director. Joseph then made his version of a closing call to the customer. He came at them from a position of threat and "you can't get it anywhere else" intimidation. They lost the order.

When Joseph's energy is high and he is feeling energized by positive opportunity, his builder power is a wonderful push and balance for his sales director's more nurturing approach. When a Builder acts on his negative, frustrated emotions, intimidation and blustering is the strategic approach and seldom generates lasting customer relations.

As you read the above example of a *builder* at work, you can almost hear him saying things like:

“Just do it.”

“Get out of my way.”

“I’ll do it.”

“Not in my department.”

“Make it happen.”

“I don’t care what I said yesterday.”

Note: Many people who are predominantly *builders* are much more refined than this. They have learned to use more diplomatic language, and they usually have some strong balancing values in the *merchant*, *innovator* or *banker* strategies which cause them to be what we call a “refined *builder*.”

BUILDER—Learning Style

Decide and Do

The *Decide and Do* style of learning is the most difficult to accommodate in a classroom. The drive of these persons is to make gut-level decisions and to take action. They want to make things different—now. They want to experience their own *power* in real-life situations.

Create contests that involve making dozens of decisions quickly, with little information. Fast-action, physical contests that create the sense of personal *power* and ability. Stacking large blocks—as a team—competing to build the highest stack or the stack that can hold the most weight. Illustrate ideas with physical games and contests. Leadership exercises—the ability to make clear commands and cause a team to work together toward a short-term goal.

The learning style of *builders* requires a connection to *power* (the application of personal energy for good effect). Whatever happens in the classroom must either relate to a decision that promises a powerful effect or the direct application of personal *power* (commands serve nicely).

Builders like to get up and move around and hate being hemmed in. They like personal space. *Builders* can’t hear you if you sit too close.

The balancing *Catalytic Value* is *faith* (I know what to do. I will get the results I intend. I will know what to do next.). Putting decide and do people in a situation that requires these issues of *faith*, with quick decisions and physical consequences, satisfies their deepest drives.

Teaching Methods that Don't Work for Decide and Do People

Builders learn by doing. They take action, observe their results, and take another action, course correcting as they go. Their high degree of spontaneity is stifled and they become very frustrated in a rote learning or highly structured setting which prohibits their kind of free-flow activity.

If you make decide and do people sit and listen they will not only not listen, but they probably will not remain seated. These people are action oriented. Give them physical things to do or decisions to make.

Do not expect much one-on-one dyad work at the intimate level, unless the work is to make specific decisions that promise concrete action and measurable results. Do not ask them to analyze data or to solve complex problems. Don't give them more information than they ask for. Make them ask for it.

Don't ask them to draw pretty pictures—back-of-the-napkin strategy sessions that are directly related to decisive action is okay. Don't ask them to do solitary research or to participate in long (more than 15 minutes) brainstorming or lecture sessions. Promise them a chance to take action soon, before every short session.

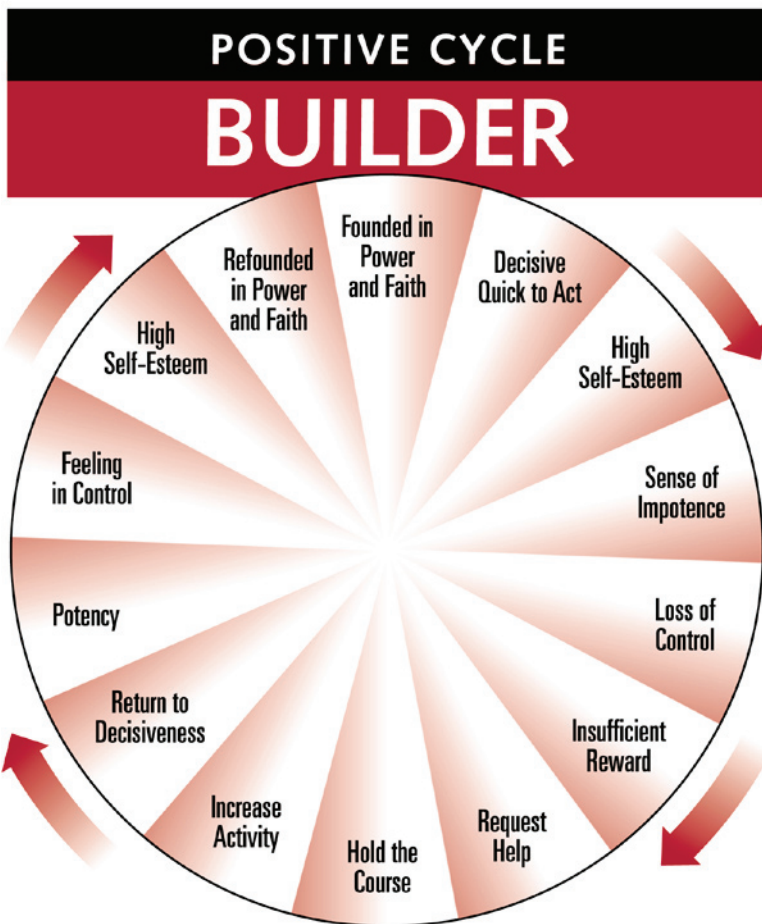
Building Self-Respect

The *builder's* self-respect is founded in the tangible evidence of applied personal *power*. The *builder's Catalytic Value* is *faith*—*faith* in the basic goodness and ability of others, *faith* in the goodness of action, *faith* in the effectiveness of striving to create, of being productive. *Builders* act because they believe that by acting there will be a guaranteed reward.

The rewards the *builder* values most are the sense of accomplishment and the respect of others. The *builder* does not look for justice or mercy, only effectiveness and results. Every action must receive an equivalent reward.

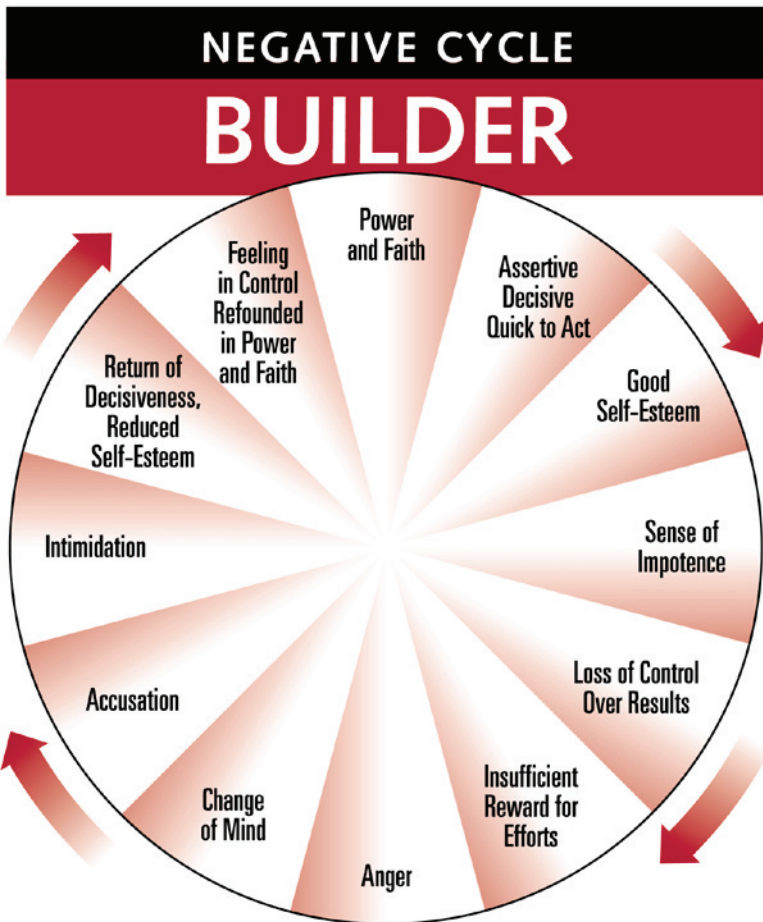
So the *builder* is more able to continue to act because of their reliance on *faith*. When *faith* is lost, when rewards do not equal effort, when the balance of *power* is thrown against the *builder*, all sense of *power* can be lost. They may begin to feel *powerless*. If so, their self-respect is lost.

When all reliance upon *power* is proven ineffective, the world is no longer a worthwhile place to be for the *builder*, and this brings out the *Intimidator*.



If there is no balance and no reward for expended *power*, then other means are justified. If people are not being good, acting within the confines of the *builder's faith* system, then an opposite action is required. For the *builder* this is *intimidation*. The opposite of *faith* is the taking of absolute control.

The *builder* goes into battle willing to risk everything in order to regain control, in order to be able to take positive action again. Once this natural order is re-established the *builder* can once again rely on faith. This is the *power/faith, impotence, intimidation, faith/power* cycle of an immature *builder*.



The mature *builder*, however, becomes an almost irresistible force. Since *faith* remains constant, encouraging continued positive action, until *faith* is proven right. The mature *builder* knows to ask for help, to enlist others into service, and to remain constant in his *faith*.

The mature *builder* also knows that *power* is not always the right strategic energy. So he shifts into his secondary, tertiary, or even his minor *Core Value Strategy*. This mature flexibility increases the *builder's* willingness to exert powerful action even in the face of risk and failure.

7

Merchant Core Values

Love catalyzed by Truth

The *merchant's core value* is *love*. *Love* is working toward an inspired vision of what can be, by nurturing the *core values* in one's self and in others. The nurturing of *core values* in one's self includes making a connection with people, certainly, but it also includes a feeling of connectedness with the universe, with the natural world. *Love* sees the truth about the way things are and visualizes the possibilities for the individual and the community.

To truly nurture the *core value, love*, in one's self requires acknowledgement of one's need for solitude, for silent appreciation of beauty. *Love* encompasses your desire for being touched and for touching. It includes the sense of being moved emotionally by a good movie or a sweet song or a grand orchestra.

But *love* is specifically *not*—

Being a door-mat,

Touchy feely stuff,

Caretaking,

Mawkishness and emotionalism,

Sentimentality.

The nature of the *core value love* might best be illustrated by the executive coach who is committed to learning who you truly are and helping you to be a mature and contributing, fully actualized version of yourself.

Love-based people relish each new experience of art and music. They remember stories about people sharing life with others. *Love* engenders our need for human history and for an optimistic view of the future. *Love*-based people foster relationships with others by accepting and placing importance on their *core values* and *Catalytic Values*TM.

So *merchants* look for opportunities to connect with other people. They desire openness and closeness with their fellow workers. They put themselves out for others and take social and emotional risks to build good relationships.

The *merchant love* value is not just about people. It consists of *love* of all things: music, ideas, stories, poetry, the Earth, aesthetics, and culture. *Love*-based individuals are people who see and understand the importance of relationships with all things. They work to gain and hold a vision of what can be, how things, people, societies, art, and music can be made better.

Love is the highest form of abstraction. It requires perception, aesthetic appreciation, and awe in the presence of beauty. *Love* is the glue that holds people together when everything else deserts them.

A *merchant's love* makes them an irresistible force in business. Without them, meaningful contacts wouldn't be made, visions couldn't be put in place, and employee relations would suffer. The inspiration that the *merchant* provides through the nurturing of the competencies of others is invaluable. They will place themselves in whatever role is necessary to help build bridges, decrease conflict, and improve the nature of relationships.

Their *love* helps them contribute to the team in various ways. Their nurturing builds dynamic teams. Their appreciation for aesthetics helps them create dynamite presentations. These actions derive from the *merchant's* need to *love* and nurture *core values* in as many different people as possible.

Note: Some *merchants* tend to be very gregarious, constantly mixing and meshing with dozens or even hundreds of persons. Other *merchants* tend to be more introspective, focusing on deep intimate relationships, one person at a time. Some of this difference in range of perspective derives from the secondary and tertiary values. But the nature of *love* itself covers this entire

spectrum of social interaction.

This need to cultivate as many relationships as possible, as deeply and completely as possible, influences every decision, judgment, and action. The *love* that a *merchant* possesses allows them to make important contributions to their teams.

In order to build their self-respect, *merchants* need to feel appreciated in return for their *love*. Being perceived as a loving person is also extremely important to the *merchant*. They spend many hours trying to cultivate their relationships. When this effort is discounted, their sense of self-worth deflates.

Catalytic Value—Truth

The *Catalytic Value* of a *merchant* is *truth*. *Truth* is the way things are, therefore, the *Catalytic Value* for *love*. For the *merchant*, *truth* is having a clear view of what is real, an intuitive and rational understanding of the way things are.

They can help the person who is not being true to themselves by making them feel confident of who they really are. This is the path of the mature *merchant*. As long as the *merchant* remains surrounded by and committed to *truth*, they will follow a positive cycle.

The negative cycle of a *merchant* begins when they feel people are purposefully untruthful to them. Without *truth*, a *merchant's core value* is no longer supported. Once they feel *truth* is absent from a situation or relationship they cut others off. They take the untruthfulness as a blow to their self-worth. They feel there is no reciprocity for the *love* they've so unselfishly provided, and they turn to the far side of *love*.

The negative cycle can also be launched when the *love*-based person feels unsafe or disregarded, and so he cannot be himself, cannot reveal who he really is. He can't trust others to *love* him as he is. The lack of truthfulness can come from any perspective or participant, but the absence of *truth* in a relationship works like the dimmer switch we talked about before. When *truth* becomes dim, the ability for *love* to flow from the *merchant* into the room is also dimmed.

Love-based people who perceive a lack of truthfulness in their relationships may complain of poor treatment. Next may be the accusation of wrong-doing by others, followed shortly by the judgment that the person in question is “not good.” In this kind of circumstance, *merchants* will manipulate and act pleasant in order to appear loving and superior and above the fray. They will garner the support of others, by black-balling the offending co-worker or friend, in order to protect themselves from being hurt further.

MERCHANT:

negative traits

- Forgetful
- Flighty
- Inconsistent
- Pouty
- Flippant
- Manipulative
- Exaggerating
- Unfounded
- Impulsive

Until *merchants* re-establish the sense of *truth* and being *loved*, they will turn from a seeker of *truth* to a purveyor of lies. They will exaggerate in order to appear more important, dramatize in order to gain attention, and lie in order to cover up for incomplete work. They sacrifice their own commitment to *truth* and desert their mission to be the nurturer of *core values* in others.

They may go into a frenzy at this point, trying to win everyone over. They may even begin to feel the need to win over the person or persons who have offended them. These tactics are sometimes effective, which encourages the *merchant*

MERCHANT:

when we are pushed

- Forgetful
- Whine
- Give up
- Cajole
- Change the Subject
- Talk About the Future
- Judge You to be Beneath Us
- Discount What You Say
- Attack
- Manipulate
- Exaggerate
- Sell-sell-sell
- Complain
- Look Innocent
- Throw Up Our Hands
- Cling to Anyone
- We Win You Over

to continue using these tactics. If the tactics are not effective, the *merchant* pouts and denies the personal value of the offender.

The mature *merchant*, however, remains open and committed to her relationships and is willing to stay engaged in conflicts that arise from lack of *truth*. She will accept and be thankful for honest feedback and criticism. She will work to keep herself from feelings of embarrassment or rejection and remain engaged with people who are challenging her. The mature *merchant's* commitment to *truth* keeps her from falling back into exaggeration, manipulation, and judging others. This steadiness and consistency provides the *merchant* and her company with solid and truthful relationships.

The Spiritual Core Value of Merchants

Merchants hang their hats on *love*. What a holy place to hang a hat. I begin with *merchants* this way for two reasons: One, because their sometimes holier-than-thou attitude can be repugnant, and two, to keep *builders* and *bankers* from gagging during this discussion.

Only *merchants* will truly identify with *love*, not because they are the only loving people, but because *merchants*, more than any other *core values* type, value relationships and the required *love* that bonds relationships above all other factors in life.

Merchants are the artists, musicians, and actors in this world. They give themselves totally to their assignments and generate passion, excitement, and enthusiasm because of this. It is the desire to give and receive *love* which drives them and makes them irresistible attractions.

Merchants will present themselves as peacemakers, entertainers, therapists, good friends, quiet listeners, and excited sales agents. *Merchants* assume whatever role is necessary to help build bridges, decrease conflict, and improve the nature of relationships; in short, *merchants* generate *love*.

But *merchants*, when backed against the wall, or when they feel their trust has been broken, may cut others off. And once a *merchant's* patient and forgiving attitude has been breached (in their judgment), they become the

most unforgiving of the lot. They generally treat others appropriately and they expect to be treated appropriately. When they do not feel reciprocity they may turn to the dark side of *love*.

Merchants not only want to control what happens but also the manner, the style, and the feelings around what happens. They want to set the tone, control the pace, and have their fingers in the whole pie.

Builders and *bankers* are very wary of the *merchant* because the idea of founding anything on something as intangible as *love* is strange to them in the first place. Second, they have trouble discerning real *love* from the manipulation of overly exuberant *merchants*.

So it is better to distrust and push off these “too soft and fuzzy” *merchants*, keep them at a distance where they can be watched and not cause too much harm.

The cornerstone of *love* adopted by the *merchant* as the highest value, can be darkened by the need to control others, and can become a very deceptive and mean tool of manipulation and malice. Beware of the *merchant* who has decided you are “not very nice.” They have spent a lifetime learning about and nurturing the *core values* in others and have, therefore, a greater ability to do damage at a deeper level than the other *core values* kinds of people.

If a person pretends to be who he is not, then any *love* that may be expressed toward him is not intended for the real person but for the impersonator. This knowledge leaves a *merchant* always looking for the actual *truth* of situations, especially regarding one’s self. Because of this, the *merchant* who is the most forgiving kind of person is also the most judgmental person and the most unforgiving when his sense of *trust* has been broken.

The self-respect of a *merchant* is almost entirely based in his or her sense of being loved and being perceived as a loving person. *Merchants* do not resort to negative strategies unless this *love* perception is threatened, whether the threat is real or imagined. When a *merchant* feels unloved, the commitment to *truth* is rationalized away. Unconsciously, the *merchant* strategy decides that any means required to regain the sense of being loved is okay.

Our Deepest Fears

The deepest fear associated with each *core value* is the opposite of that *core value*:

Love-based people fear being hateful or without any *love* in them. Our deepest fear is that we are not *love*.

It is understandable that when people lose their sense of being a positive contributing presence, whether that sense of being is one of *power*, *wisdom*, *love*, or *knowledge*, their dark side comes out to protect them. None of us is very attractive or welcome when our negative *conflict strategy* is the only energy we are emitting into our surroundings.

Contributions to the Team

Merchants tend to be exceptional team builders. They rally people together, are constantly excited by new ideas, and are never the ones to ask if something is possible. They assume every idea they have is possible. In fact, just having an idea is cause for celebration and justification for rewards as far as *merchants* are concerned. *Merchants* believe that “nothing happens without a good vision.”

The power of *merchants* comes from this willingness to think about, consider, and expose one good idea after the next. They think as they speak, changing and modifying their vision in real time. Since every business is a constantly changing organism, *merchants* are invaluable resources. They inspire others to go after their visions.



Their excitement is infectious and the people around them are inspired and perform better when the *merchant* is emitting this energy. Unlike builders, merchants get little satisfaction from feeling the effects of their own physical energy. They do, however, work very hard to assist and support and serve others. They love being part of a high-energy team.

Merchants thrive on motivating others to become excited about the current vision. This helps them create dynamic, driven, and directed teams. *Merchants* get satisfaction from seeing their visions come to life through the efforts of themselves and others.

Merchants also have appreciation for aesthetics and quality of presentation. This allows *merchants* to take the contributions that *builders*, *innovators*, and *bankers* make in the workplace and package them for maximum impact. When others are stuck in the crisis of the present dilemma, the *merchant* is able to see the future.

For instance, they take the “to do list” tasks from the *builder’s* scratch pad and encompass them in the company’s long-term vision. They find alternative ways to illustrate the points from the *banker’s* complex spreadsheets and reports so that everyone is able to understand the current situation and learn how to move forward. They serve as a sounding board for *innovators* and help them elucidate their solutions so that everyone on the team can see the logic and the worth.

This skill of interpretation best helps the *merchant* nurture their relationship with *innovators*, *bankers*, and *builders*. They are the diplomats of the team, working tirelessly to create peace and cohesiveness. *Merchants* work hard to get the team to work together. Without the *merchant* mind involved in a business, the workplace becomes a chaotic miasma of *builder* activity and decision-making.

Merchant energy enlivens the sometimes slow-moving *innovators*, tuning the innovations to current and future customer desires. *Innovators* are saved from becoming lost in innovation by *merchants* who urgently desire new things to bring to customers.

Merchants also help to overcome the *banker* tendency to hold back

and say no. The *merchant's* enthusiasm and willingness to proceed and see opportunity within the worst of conditions adds an essential balancing ingredient to any team. What can feel at times like ungrounded optimism, may represent the only willingness to pick oneself up and start all over again. It can be the light that follows the storm.

Impositions to the Team

Although *merchants* are great motivators and team builders, they grow frustrated easily and don't take rejection well. If a *merchant's* attempts at relationship building, creating new visions, or interpreting data are rejected, they may take it personally.

Rejection causes merchants to revise their long-term visions and to approach individuals to "work out a few issues," which puts team members into a state of confusion and can waste valuable time that should be spent completing tasks associated with the project at hand.

Unfortunately, rejection is not the only issue that motivates *merchants* to change plans. Their internal drive to create new relationships and opportunity causes them to start something new as often as possible. When they finish something it may be because they don't want to disappoint someone, not because they themselves place much value in completion and results.

These *merchant values* cause them to conflict with *builders* regularly. *Builders* want results. They want to complete one project before moving onto the next. When a *merchant* begins a new project before finishing the current project, this threatens a *builder's* need to demonstrate worth through completion of tasks.

Scenario Four

Remember Joseph and his sales director? I was working with both of them one day in a sales strategy meeting. Joseph started the meeting by calling attention to all the sales quotes that had been created without closed sales. (The fact that the company was experiencing extraordinary growth and a better closing ratio than ever before were inconsequential to him). Bill, the sales director,

was a seasoned sales veteran with many years working for large, successful companies. He was used to professional meetings and reasonableness.

As Joseph ranted on about the lost opportunities, Bill became more and more morose, until he finally looked at his boss and said, “So why don’t you fire me then?” Joseph’s response came without thought: “You’re right. You’re fired.” When a merchant slips into the victim role and whines, a builder’s sense of urgency is increased. The powerless presence in front of them is not respected. This was not a particularly effective start for our sales strategy meeting.

After an hour break, during which the relationship was jerry-rigged together, we tried to restart with a report on the recent successes of the sales team and a report from Bill regarding future opportunities. We were able to move forward from there with only an occasional aside regarding missed opportunities.

The *merchant’s* need for newness also gets them into trouble with *bankers*. *Merchants* do not easily tolerate doing a task the same way every time they are required to do it. This inconsistency often causes their focus to disintegrate, causing them to get out of control.

Merchants often appear disorganized, relying on memory and personal relationships rather than systems and procedures. *Bankers* frown on this “immaturity” and complain about reports and systems being incomplete or misused.

Scenario Five

I was debriefing one of our best merchant sales people when he launched into an explanation of how he had gotten the potential customer excited about our products and services.

George began by explaining how he had gone flawlessly through the assessment stage of the sales meeting into the process of matching the benefits of our products to the customer’s needs.

To my surprise I began hearing about products we did not have—features we had not even discussed and products being used in ways I would not recommend.

We had to spend a good deal of time slowing George down, reminding him to stay with the present and sell what we had. Since George is a profound merchant, I had to be very careful not to come down too hard or be too critical, complimenting him on his effort and thanking him for his enthusiasm.

When *merchants* get out of control or feel undervalued, they use several very effective strategies for getting back into control. They whine, a sound that attracts the attention and sympathy of other *merchants* within earshot.

Another strategy is to pout. They hang their heads in shame to make others feel guilty for negatively critiquing them or for not appreciating them. Their favorite method of regaining control is this kind of manipulation.

During the de-briefing meeting described above, George began elaborating on the size and importance of his customer several times. When my criticism was specific and given with a directive to be careful in the future, George moved quickly into hyperbole, exaggerating the impact he had had with the customer.

No order had been written. In fact, a written quote had not been created, but George assured me this new relationship would lead to great things.

This *merchant* strategy to move away from conflict, to deflect criticism with exaggerated success or to change the subject to an exploration of future opportunities infuriates *builders* and disappoints *bankers*. This strategy is the *merchant's* Achilles' heel, causing a break in *trust* with others, when *trust* is one of the things *merchants* value most.

Merchants tend to succeed quite well at building contacts, inspiring their teams, and creating visions, but where they sometimes fall short is controlling their whims and their desire for constant appreciation and stimulation. In order for *merchants* to be a part of a strong company or department, they need to have good support systems, open and flexible, but appropriately restrictive without too much detail and repetitive work.

They work best in teams, especially when new ideas for future opportunities are encouraged and they are allowed to float free form for a while. This gives them the chance to visualize the future without fear of harsh criticism, increasing their willingness to think “outside the box.”

Merchants will generally participate well with their team as one idea after the other is left for future evaluation, as long as they are appreciated for their participation. They will even participate in eliminating their own ideas from the table in an effective strategy meeting, as long as they are respected members of the team.

***Merchants* can often be heard saying:**

“Come on, let’s go.”

“Let’s do it.”

“We can do it.”

“I’ll teach you how.”

“Let’s work it out.”

“Why don’t we?”

“What report?”

“I thought we did that yesterday?”

“This is going to make us rich.”

“We are going to get a lot of business out of this.”

MERCHANT—Learning Style

Talk and Listen

The *Talk and Listen* style of learning is a high-energy, fun, and team-oriented experience. The most engaging methods for teaching in this style involve games, situational dramas, and group and individual presentations—lots of pictures, drawing exercises, illustrations, videos—short informative lectures (5-10 minutes) with instant application in a fun exercise.

Personal sharing in small teams and one-on-one encounters relating to personal topics are also important and desired by people in this group.

Any method that utilizes *love* and *truth*, the *core value* and *Catalytic Value* of the *merchant*, is the best way for a *merchant* to learn. Create exercises that require face-to-face discussions, sharing of personal stories, and brainstorming about future possibilities. Full group discussions and short presentations by each individual *cause room energy and laughter to increase*.

Teaching Methods that Don't Work for Talk and Listen People

Talk and Listen people are not patient with data and information sessions. They are bored and frustrated by research and other solitary assignments. Books and literature should not be academic or highly literal. Listening to long lectures without interaction is an attention killer.

If classroom sessions do not allow extended conversations, Socratic discussions and small team interactions, you cannot engage these people. They think and make decisions as they talk. They work out problems through discussions. They enjoy supporting each other in the process. The best learning happens when these elements are pervasive in the learning environment.

Merchants learn by talking. They talk through their ideas, course correcting as they go, always listening to their own words, and evaluating the appropriateness of each conclusion. They drive other people crazy with their seeming inconsistency. *Merchants* really aren't that inconsistent. They are constantly in process and therefore almost everything they say is being modified as they speak.

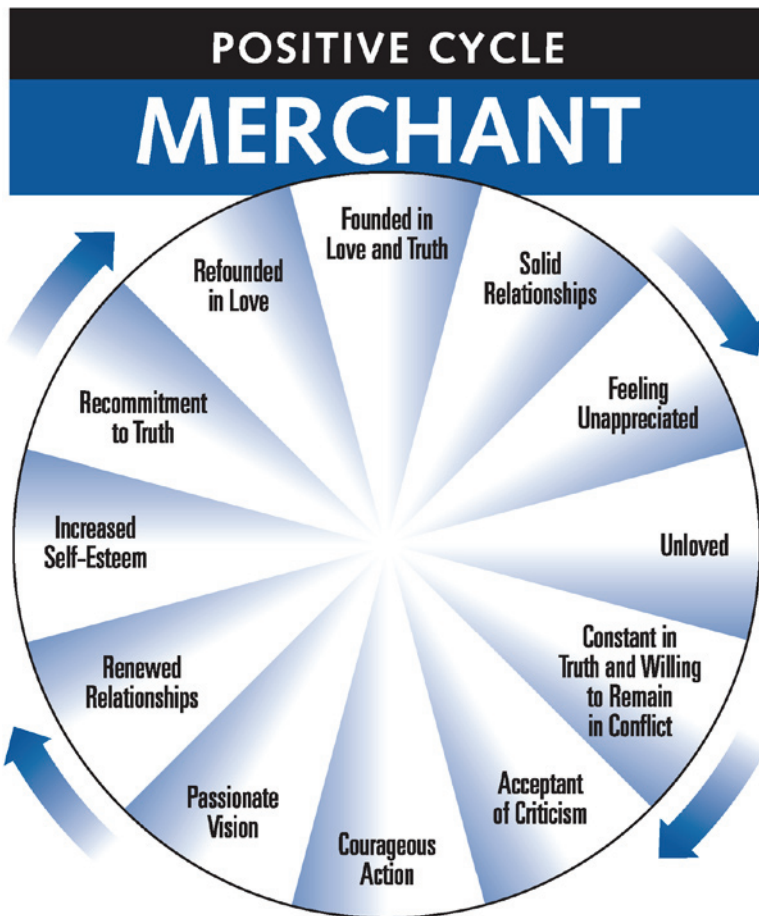
Merchants are like innovators in the fact that they hate to finish a good idea, a good vision before they perfect it. To do the perfecting, they keep talking. Brainstorming sessions with others, especially innovators who add juice and complexity to the ideas of *merchants*, are a wonderful extension of the *merchant's* learning process.

So games, exercises, group projects, and dramatic presentations are all

learning approaches that appeal to *merchants*. Like *builders*, *merchants* also like to be highly active. Don't leave them sitting too long. Make time for them to talk.

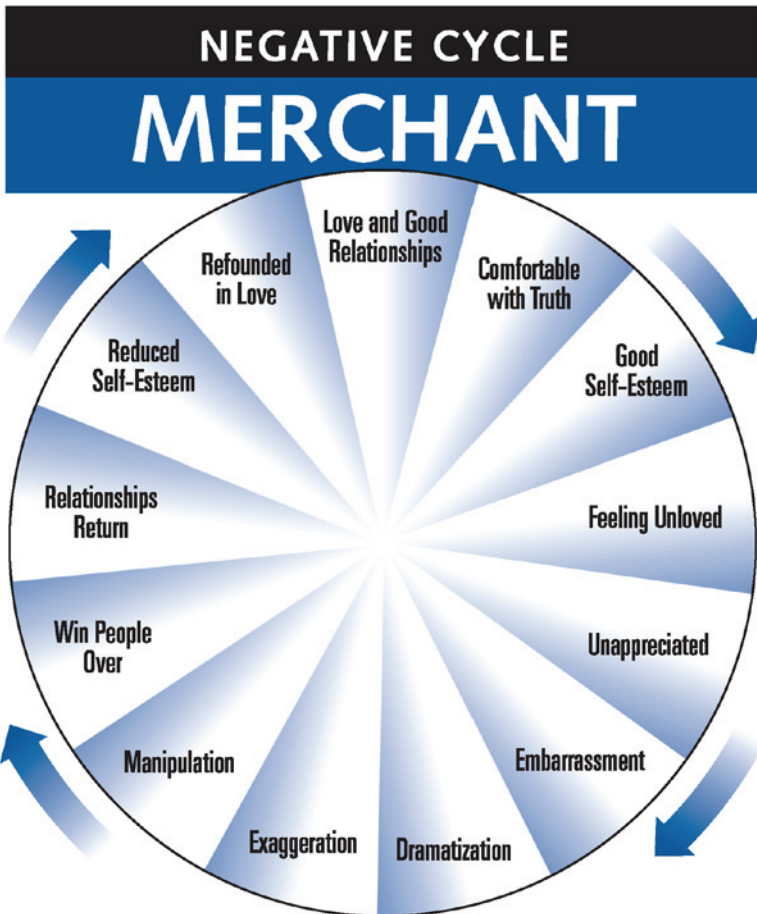
Building Self-Respect

Merchants derive self-respect from the quality of *love* around them, from the apparent need of others for their *merchant love*. As long as this seems real, then truth is the *merchant's* balancing value. *Merchants* are more willing to explore truth at more levels in more areas of concern than any other *core value*: Personal, family, work, society, religion.



Since the *merchant* is more likely to accept others, he is often found to be gullible, trusting too much, not holding onto skepticism as tightly as might be reasonable.

The mature *merchant*, remains open and committed to his relationships, is willing to stay engaged in conflict, and trusts that good will come of it. His commitment to truth keeps him from falling back into exaggeration (lying) and allows him to accept whatever responsibility is his for an undesired result. This steadiness and consistency in relationship with others makes lasting friends of those around him and builds trust. The power of the mature *merchant* grows exponentially during serious difficulties, if he remains engaged and accessible.



8

Innovator Core Value

Wisdom catalyzed by Compassion

The *innovator's core value* is *wisdom*, seeing the way things are and discerning what to do about it. *Wisdom* is the profound and essential attribute that allows a person to make effective choices. *Wisdom* is the ability to discern and weigh one's option, benefits, and consequences.

The *innovator* takes *knowledge* and basic facts and applies them to find all conceivable outcomes, choosing the best of them as the wise response. The *innovator's* pursuit and perfection of *wisdom* provides him with the capacity for quick and thorough assessment, prioritization, and reconfiguration of solutions, systems, and processes. The *innovator's wisdom* allows him to solve problems.

Without *innovators*, businesses would have a difficult time growing. *Innovator wisdom* makes the conception and design of products possible. It opens market opportunities and resolves conflicts with vendors, customers, and employees. *Wisdom* is the linchpin of all problem-solving. *Wisdom* applied in the workplace makes on-going success an achievable dream.

The *innovator* contributes to the team by never giving up on finding a solution. They are extremely patient and you will often find them sitting in isolation in order to assess the appropriate solution to a challenging problem.

These behaviors stem from the *innovator's core value, wisdom*. The need to find the conceivable outcomes for every situation motivates the

innovator in every decision, judgment, and action that they take. *Wisdom* influences the *innovator* and helps him make contributions to his team.

In order to build self-respect, *innovators* need to feel that others value their *wisdom*. Their *wisdom* has to be applied to worthy situations and perceived by others as a necessary element of doing business.

The amount of self-respect gained through work is directly derived from the complexity of the problems against which they are matched. The bigger the problem, the more robust and valued the *innovator* feels. When we use the systems and processes that *innovators* so carefully concoct, we nurture their strongest *core value*.

Catalytic Value—Compassion

The *Catalytic Value* of the *innovator* is *compassion*. For the *innovator*, *compassion* is remaining empathetic and curious regardless of the behavior and emotions of others. This ability supports the *innovator's* aptitude for weighing the pros and cons of a problem and conceiving an appropriate solution.

Compassion is the *Catalytic Value* for the *wisdom*-based person. When he feels *compassion*, he is able to remain curious and open to see the way things are. *Compassion* allows an *innovator* to be tolerant, accepting, and forgiving. This ability to see situations and people clearly and without judgment nurtures the *innovator's wisdom*.

Compassion allows an *innovator* to rise to a higher level of thinking than people in the three other value sets, who are more likely to become caught up in the fray, especially *merchants* and *builders*. Using *wisdom* supported by *compassion*, the mature *innovator* is on the path to a positive cycle. *Innovators* understand how others might be caught up in ineffective behavior and seek to find ways to bring the team back together.

The negative cycle of an *innovator* starts when their tolerance, acceptance, and forgiveness diminish. This occurs when the *innovator*, feeling controlled and pushed, is required to settle on a solution too rapidly or when others appear to casually dismiss their best ideas without understanding their full intent.

The *innovator* moves from compassion into interrogation, and from *wisdom* into cleverness and sabotage. *Wisdom* becomes an arsenal, and *innovators* are willing to use it to present two arguments with equal weight in order to throw whole groups of unsuspecting businesspeople into indecision.

Innovators want their solutions to be implemented. Immature *innovators* want their ideas to be fawned over. When they aren't, *innovators* will seek to regain control. They will cause chaotic thought and confuse the issue with unrelated facts or simply change the subject, by asking unrelated questions, or proffering circular reasoning.

If the *innovator* has established any respect, this tactic is highly successful. No one will act without hearing the wise counsel of the *innovator*. And no one can get the controlling *innovator* to think faster, share thoughts sooner, or get a decision made before they are good and ready.

Once the *innovator* has set a course of subverting their *wisdom* into clever leveraging and control, they are likely to use the resulting leverage to gain additional advantages over other people or to elevate their position in the organization. When the *innovator's* *wisdom* and *compassion* are misapplied, it can create a terribly disruptive force in the office.

The mature *innovator*, however, learns not to fall back into interrogation, attempting to throw others off. They apply their *wisdom* and *compassion* to present problems and look for solutions to conflicts. By sitting back and watching, the *innovator* is able to see others as they really are and maintain an attitude of curiosity, understanding and acceptance. This stance makes the mature *innovator* a respected counselor and a valued advocate in difficult situations.

The Spiritual Core Value of Innovators

Wisdom is the spiritual cornerstone upon which *innovators* build. *Wisdom* is the profound and essential attribute which allows a person or a society to make choices. *Wisdom* is the ability to discern options and to weigh one option over another through extrapolation of consequences and projection of likely results.

Wisdom is applied *knowledge* and basic facts turned into understanding and perceived truth. The *innovator's* life is based on the pursuit and perfection of *wisdom*. *Bankers* may develop millions of megabytes of data and esoteric information, but it is the *innovator's wisdom* and capacity for quick and thorough assessment, prioritization, and reconfiguration that unlocks the power of the *banker's knowledge* and sets it to work.

The *wisdom* of *innovators* keeps company presidents from throwing the baby out with the bath water. The *wisdom* of *innovators* makes the conception and design of products possible. It opens market opportunities and resolves conflicts with vendors, customers, and employees. *Wisdom* is the linchpin of all problem-solving.

Wisdom applied in the workplace makes on-going success a realistic dream. It makes downturns in the economy just another problem to solve. No set of circumstances will defeat the *wisdom* of an *innovator* who is not caught up in personality dramas or feeling fearful.

When backed into a corner, the *wisdom* of an *innovator* becomes cleverness, deceitfulness, distraction. An *innovator* is perfectly willing to use his *wisdom* to present two arguments with equal weight, to throw whole groups of unsuspecting businesspeople into indecision, either through clever argumentation or through presentation of complex facts and ideas which are not resolvable at face value.

Innovators are capable of asking questions that expose the ignorance or foolishness of others. This takes the pressure off of the *innovator* and makes him look wise, by comparison with those he has caused to appear foolish. With insightful observations, the *interrogation* of the *innovator* makes everyone in attendance reluctant to exchange verbal blows.

Innovators love to show their ingenuity, especially when others appear to be floundering. So *innovators* who are seeking control of a situation will cause chaotic thought, will confuse the issues with unrelated facts, or will simply change the subject. More likely an *innovator* will add one more layer of complexity each time someone else appears to be heading toward a decision. This keeps the focus of the group on the *innovator* and gives the *innovator* the chance to be the heroic problem-solver.

INNOVATOR:

negative traits

- *Stubborn*
- *One-Track Mind*
- *Distracted*
- *Indecisive*
- *Disconnected*
- *Protected*
- *Uncooperative*
- *Cool*
- *Unresponsive*

The *wisdom* of an *innovator* who is seeking control creates chaos, indecision, confusion, and anger. An *innovator* who feels the group moving against her favorite plan will throw additional disaster prophecies into the mix and then suggest regrouping later, during which delay the *innovator* declares that she will “come up with an appropriate plan.”

The secondary spiritual value of *innovators* is compassion. Since *innovators* are able to make quick assessments which lead to an understanding of people and situations, they are able empathize with others. *Innovators* understand the why and the underlying

INNOVATOR:

when we are pushed

- *Re-route*
- *Re-consider*
- *Get Stubborn*
- *Shut Down*
- *Re-compute*
- *Slow You Down*
- *Try to Confuse You with the Facts*
- *Deny Facts that Don't Fit Our Solutions*
- *Complicate Your Life*
- *We Quit!*
- *Withhold Feelings*

motivations of others' actions. This makes *innovators* very strong team players.

The self-respect of an *innovator* is almost entirely based upon the perception that his or her *wisdom* is valued by others, is being applied to worthy life situations, and is perceived by others as *wisdom*. An *innovator* does not resort to negative strategies unless this high valuation of personal *wisdom* is truly threatened or perceived by the *innovator* to be threatened.

When the *innovator* experiences the opposite response from others, when his ideas are ridiculed or rejected outright, this creates the fear that possibly the *innovator* is truly a fool—totally devoid of *wisdom*. When an *innovator* loses that sense of valued *wisdom*, they lose their compassion for themselves and others. They become the interrogator.

Our Deepest Fears

The deepest fear associated with each *core value* is the opposite of that *core value*:

Wisdom-based people fear being a fool or feeling foolish.

It is understandable, that when people lose their sense of being a positive contributing presence, whether that sense of being is one of *power*, *wisdom*, *love*, or *knowledge*, their dark side comes out to protect them. None of us is very attractive or welcome when our negative conflict strategy is the only energy we are emitting into our surroundings.

Contributions to the Team

Innovators are the solution creators in this world. They can always think of another approach. “There’s got to be a better way” is more than their motto; it is a pre-programmed ROM chip in their brains. *Innovators* enjoy the challenge of a problem. They enjoy this so much that they hate to settle on any one solution. *Innovators* can often be heard saying, “Wait, what if we...”

The power of *innovators* comes from their unwillingness to accept that there is anything they can't figure out. They are willing to put their ego at risk over and over again, staked on the bet that they will be able to come up with a plan, a solution, or an idea that will make things better.

When everyone around them is in a panic, the *builder* shouting orders, the *merchant* whining or up-selling, and the *banker* preaching justice, the *innovator* tends to isolate and set quietly to work.

The flexibility of *innovators* is also highly prized by all other players. *Innovators* make little distinction between which problems they are asked to solve. The process of deriving a solution is sufficient enough to make them happy. *Innovators* are a key element in every business situation where change is occurring. Their resourcefulness brings new methods, new tools, new systems, and new mechanisms to bear, always opening new opportunity for success.



Innovators love to have people around. They love to have an audience for their creativity. They love to explore their latest ideas with people. They enjoy being appreciated for each and every subtlety. This need to be thought of as ingenious ignites ideal working relationships with *merchants*. Due to the *merchant's* love of new ideas and creating visions, they place high value on brainstorming with *innovators*.

Innovators also work well with *builders* when there is a need for a good balance between the drive for action versus the drive for effectiveness. *Innovators* are very perceptive. They understand the potential tensions they cause with their need to perfect their solutions, and they are willing to act differently if they can only see how the different action is going to produce better results. For this reason, *innovators* and *builders* make wonderful teammates.

Impositions to the Team

While the solutions and systems that *innovators* create are well founded and practical in concept, *innovators* themselves are not highly practical in approach. They do not make good implementers because they want to perfect everything before acting. Taking action to them is coming up with another innovation which delays the implementation of their systems or new products.

Innovators love the process of problem-solving more than the process of actually building and selling something. As soon as one product or service idea is implemented, they are off to create another better solution. The more deadly sin of *innovators* is their desperate need to continue perfecting a product or system long after it would fully serve its purpose. *Innovators* get addicted to working on a specific solution. Profound *innovators* need to work with *builders* who insist on settling on one solution and completing it.

Scenario Six

Recently I was introduced to a software company that was being run by two Innovators, both with secondary Builder traits. These two had devised a very clever software program, which they had released but not yet debugged. Each time a “bug” was reported to the company, one of them two would grab the “bug” project and set out to correct it.

They made numerous innovations in the process, not considering any of the ramifications related to existing customers, changes required in the manuals, or profits. The excuse of solving a bug became a rework of an entire section of code, and therefore a need to debug almost everything again to make sure that the changes didn't cause other problems. They almost always did.

They desperately needed a banker to come in and detail their programs, finding and fixing, without making additional changes. But the Innovators said, “No one will ever be able to understand the clever things we have done. We can't trust anyone else with the source code.”

Interestingly, whenever one of them comes into the office with a new set of innovations and a “bug” fix, they turn their Builder dynamo loose and demand that everyone instantly convert their fixes to product, get it packaged and out the door. This causes no end to the chaos and frustration.

Innovators can be very stubborn people. They build much of their contribution through a disciplined tenacity that sometimes becomes stubborn obstinacy. They refuse to be moved until they feel their solutions are perfected.

Since they also place high value on assessment, they not only like to create a new solution, but they want to be the one to assess its appropriateness, correctness, cleverness, and perfection. In fact, they are certain that no one else could ever understand all the subtlety and complexity of their solutions, so they hate to let others really get into it and explore.

Every decision for an *innovator* becomes a marathon of adding one more consideration into the equation, testing its full ramifications, and announcing: “I can see how that will fit.” Then when everyone else considers the decision to have been made, the *innovator* announces another level of considerations that must be explored prior to finalizing the decision. *Innovators* can be infuriating to *merchants* and *builders* who want to move on.

Innovators need *merchants* who will actually make someone else understand the value of the “solution” being sold. And they need *bankers* who will support them by completing the details and help them control costs and make profits.

Innovators will often be heard saying:

“I think I can make that work.”

“We can do that.”

“It’s not ready yet.”

“When I say it’s finished, it’s finished.”

“All we have left to do is...”

“There’s got to be a better way.”

Innovators can also tend to become highly skilled at solving certain types of problems. *Innovator* engineers, for instance, may be geniuses when designing a new electronic circuit but more like absent-minded professors when it comes to developing business solutions for their departments.

When *innovators* are out of control they get stubborn. They look for another way, the way to go around you, to make you reconsider. They reconsider and resist making a decision. They fume and refuse to talk about it.

Innovators will stare you down with a look that says, “How can you be so stupid?” They add another wrinkle to the equation to confuse you. They deny facts and challenge the validity of data, which really infuriates *bankers*. They refuse to take action, which puts *builders* into a rage. They quit, destroying the visions and popping the balloons of the *merchant*.

When all else fails, *innovators* resort to interrogation. They like to confuse the issue with side questions. They know how to ask questions that are more accusation than question. They know how to get under the skin of other people, asking questions that shame and embarrass, that show the ignorance of others or simply make others feel ignorant or confused and inadequate.

Interrogation is just as powerful a strategy as the *intimidation* of *builders*, the manipulation of the poor me victim, caretaking strategy of *merchants*, or the aloof judgment and unchangeable positioning of the *bankers*.

INNOVATOR—Learning Style

Observe and Solve

Complex, difficult challenges must be the core of this learning experience. Situational stories with multifaceted and varied possible outcomes, brainstorming, scheming, and gathering of information using all five senses (not detailed research)—these elements must be in place to capture the observant, problem-solving mind.

Clever mysteries, puzzles, systems assessments, and recommendations,

real-life, hard-edged stories with complex, interconnected stratagems make the *observe* and *solve* style of learning creative and engaging.

The *core value* that must be honored in this learning style is *wisdom*. These people need to have a complex situation to evaluate. Complex and difficult problems intrigue these people and their self-respect is significantly based on the size, importance, and difficulty of the problems they solve.

They must be asked to make individual assessments, developing their own intellectual powers. They must also be allowed to share their observations—brainstorm and derive a wise response or solution. They are competitive with their ideas. They enjoy having their solutions accepted and put into practice, and they thrive on interactive “storm and solve” sessions.

They are able and willing to remain compassionate with people, so discussions are generally high energy and confrontational without being combative. All lessons that require observation, understanding, and *wisdom* will captivate this type of student.

Teaching Methods that Don't Work for Observe and Solve People

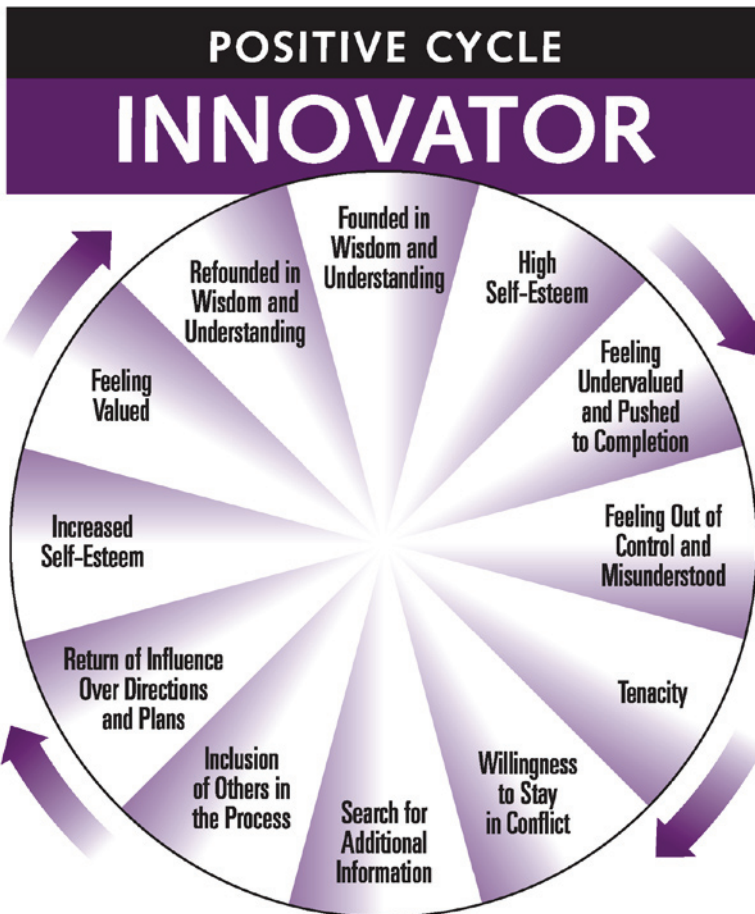
It is ineffective to give *observe* and *solve* people spontaneous, high-energy exercises that do not allow them to develop a comfort level for the process and environment or time to work out a good solution (response). Don't give them easy problems to solve.

Don't provide answers to them. Let them develop their own. Don't give them repetitive tasks or a simple transference of numbers into different forms—no analysis. These people want to be creative, clever. You can talk to them for hours if there are lots of engaging questions, and good Socratic dialogue and debate.

Innovators learn by invention. Give *innovators* partial sentences that they have to complete. Give them a problem to solve independently or corporately. Give them a game with clear objectives and lots of obstacles in the way.

Give them a maze with five end points but only one with the cheese at the end. *Innovators* learn by ciphering, computing, assessing, evaluating, postulating.

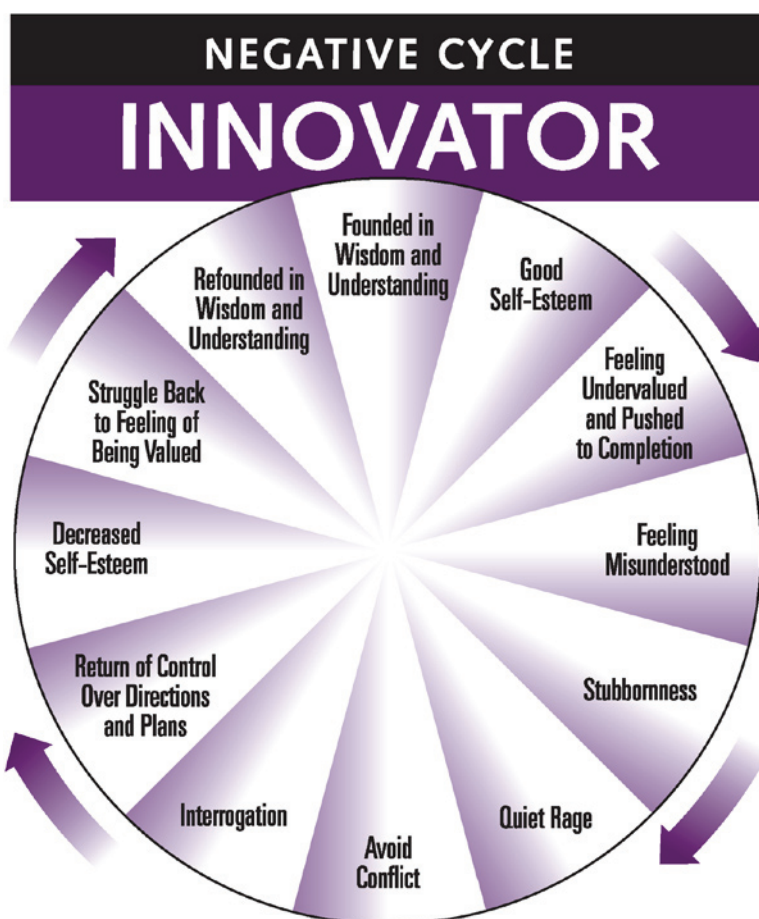
Innovators are more visually oriented than *merchants* and *builders*. Visual resources provide additional stimulation to an *innovator's* need to assess information as they pursue the right solution. Don't tell *innovators* the answers, they'll just disagree. Ask them to find the answers themselves and they'll consider you a genius.



Building Self-Respect

The *innovator* derives self-respect from the complexity of the problems against which she is matched. The bigger the problem, the more robust and valued the *innovator* feels. When this feeling of esteem is fully in bloom, the *innovator's wisdom* is balanced by a second spiritual quality, *compassion* (understanding).

An *innovator* who is acting out of strong self-respect is perceptive and open to all kinds of influence. They become tolerant, accepting, and forgiving, able to see people and situations clearly, without judgment.



This allows an *innovator* to be compassionate, rising to a higher level of thinking than the other *core values* types, who are more likely to become caught up in the fray, especially *merchants* and *builders*. The mature *innovator* understands how others might be caught up in ineffective behavior and seeks to find ways to bring the team back together.

When the *innovator* feels controlled and pushed, required to settle on a solution too rapidly, or when others appear to dismiss her best ideas casually and without understanding the full intent, the *innovator* can become merciless.

This is the negative cycle of an immature *innovator*. She moves from *wisdom* and *compassion* into accusation, from *compassion* into *interrogation*, from *wisdom* into cleverness and sabotage. As the *innovator* matures, she learns to remain patient, to listen and observe until clear solutions come.

As the *innovator* learns not to fall back into *interrogation*, attempting to throw others off, he remains committed to acknowledging his own ignorance and to looking for the opportunity to gain more understanding.

The mature *innovator* applies *wisdom* to present troubles and looks for solutions to present conflicts, becoming the reasonable voice in a harried crowd. By sitting back and watching, the *innovator* is able to see others as they really are and to maintain an attitude of understanding and acceptance. This stance makes the mature *innovator* a respected counselor and a valued advocate in difficult situations.

9

Banker Core Values

Knowledge catalyzed by Justice

The *banker's core value* is *knowledge*, knowing the facts through research, measurement, proof, and records. *Knowledge* is the awareness of facts, data, information, construct of systems, validated truth, and principles. *Knowledge* motivates and influences bankers to make every decision, judgment, and action. The *banker* mind desires complete *knowledge*, detailed information, useful facts, and data.

The influential *banker* is one who is committed to educating themselves and others, and to guiding others with their *knowledge*; they may not excel in the ability to present and disseminate the *knowledge* that they gather and analyze so carefully.

Their mission is to be the availability of *knowledge* in the room, at the moment when that *knowledge* is needed most.

Successful businesses require the *knowledge* that *bankers* possess. The *banker's knowledge* ensures the success of every operation. This is because the *banker* is committed to using *knowledge* to make sure decisions are appropriate, systems are organized, and operations are optimized.

You will often find the *banker* researching in isolation, collecting information, and trying to find all possible data. These behaviors stem from the *banker's core value, knowledge*. Possessing *knowledge* gets them to a point where they can make judgments, decisions, and take actions. *Knowledge* influences *bankers* and helps them make contributions to their team.

The need within their community for the *banker's knowledge* helps *bankers* build self-respect. Having them work on projects that require them to gather data, and then using that data to complete the project, provides them with self-worth. Their *core value* is being nurtured because their work is aligned with finding *knowledge*. When their *knowledge* is used in positive ways, it helps them feel like they've made an important contribution.

Catalytic Value—Justice

The *banker's Catalytic Value* is justice. For the *banker*, justice means ensuring the equity of access, accountability, compensation, and opportunity. After the *banker* gathers data, facts, and information, it needs to be disseminated and used to make appropriate decisions.

Justice works as the *Catalytic Value* for *knowledge*. *Bankers* view the world through the veil of their own information, and make judgments. When they see that their important *knowledge* is not used, or that it is used to do wrong, or that their *knowledge* is made available only to some, their sense of *justice* is offended and they cannot give their *knowledge* into an unjust situation.

Once a *banker* begins the negative cycle, all bets are off. The *banker* is willing to withdraw all participation from whatever game is being played. This usually does not mean physically leaving. There is simply a complete lack of action or effort, an intentional withholding of information.

The *banker* expends no energy when their self-respect is at stake. The *builder* may be raging, the *merchant* manipulating and exaggerating, the *innovator* throwing confusion into the system, all to regain control.



The *banker's* strategy is masterful. Wait. Refuse to play. Outlast everyone. The *banker* settles back into a reservoir of *knowledge* and waits for opportunity to arise.

When the *innovator* kicks in a clear and reasonable solution to the business problem, the *banker* is ready with an arsenal of challenging propositions, all of which lead to disaster, forming an intolerably complex problem. Then when everyone turns their excited, angry energy in the direction of the *banker*, the *banker* pulls out the ultimate weapon: he becomes *aloof*.

The *aloof banker* cannot be intimidated, cannot be manipulated or cajoled, cannot be interrogated or cross examined. An *aloof banker* in leadership regains control by outlasting all the others and refusing to join in the ruckus.

When all the others are panting and out of breath, the *banker* claims the right of survivor and exerts the basic proposition of *knowledge*, a lot like playing the Ace of Spades into a royal flush on the last hand.

The mature *banker* remains true to his sense of justice and relies upon the founding quality of real expertise and real *knowledge* to eventually rule. Having applied his thirst for *knowledge* first to self-awareness, the mature *banker* is quick to recover from an attack of aloofness.

The Spiritual Core Value of Bankers

The *spiritual core value* of a *banker* is *knowledge*, *knowledge* in all its forms and functions. *Knowledge* is the basis for all human progress, both in society and in each individual. From the first attempts of a child to speak, through the personal evolution of each individual toward self-awareness, to the last thoughts of a great thinker expressed to guide humanity in its next steps, *knowledge* is the primary ingredient which makes everything possible.

Knowledge is the basis of all business, all political systems, and all social organizations. Science, music, religion, literature, commerce: all human enterprises begin and end with *knowledge*.

A painter knows how to mix colors and how to build the illusion of three dimensions into a two-dimensional painting. A bricklayer has learned the mixing of mortar and the cutting and setting of bricks. A scientist knows the mathematics and the chemical makeup of things, allowing experimentation to lead to innovation. Some *bankers* are very successful in their effort to make the world around them march to their *banker* drum.

Businesspeople who set for themselves the task of building successful operations have to have basic *knowledge* in finance, manufacturing, accounting, marketing, sales, and management of people. Underlying these obvious *knowledge* areas are the fundamentals of algebra, psychology, physics, electronics, economics, reading, writing, and arithmetic. Without appropriate *knowledge* in each of these areas, businesses fail.

A *banker* who allows the primary value of *knowledge* to lead him into pursuit of greater *knowledge*, into sincere application of existing information, is an invaluable resource. The *banker* mind desires complete *knowledge*, detailed information, utilitarian facts, and data.

Since the only purpose of *knowledge* is to educate and guide others in their enterprises (practical application), a powerful *banker* is committed to and excels in the ability to present and disseminate his *knowledge*, which is gathered, categorized, and analyzed carefully.

In order to be a fully developed *banker* there must be a commitment to acquisition of *knowledge* about one's self. A *banker* who makes this *knowledge* first in priority is driven not by a desire to control others through development of expertise and specific *knowledge*, but rather by the profound spiritual desire to open minds, guide thoughts, and bring more practical application of *knowledge* into the workplace and into the world.

Bankers who are stuck in their need for controlling others, who are fearful of losing their indispensability, withhold information. They give incomplete instructions and answer essay questions with yes or no, true or false answers. Some *bankers* are very successful in their effort to make the world around them march to their *banker* drum.

I have seen *bankers* take whole companies down by withholding their information, making themselves feared tyrants or seemingly indispensable workers, making simple tasks an amazingly complex labyrinth of undocumented procedures and hidden sources of essential information.

Computers with passwords and encrypted files with hieroglyphics for titles all serve the power-hungry *banker's* urge for control. This is one of the many ways a *banker* who is immature may choose to act inappropriately.

Love of *knowledge* is just as insidious as the love of money or power and often a lot harder to identify. A *banker* who is feeling pushed or who is working in a threatening environment will often use his *knowledge* to undermine, resist, deflate, override, cause delay, and just generally control the workplace with it.

If unsuccessful at controlling his environment with his *knowledge*, he may attempt to control the people around him by volunteering to “do a little research on this. I’ll get back to you,” thereby keeping everyone waiting expectantly for the *banker's* perfect conclusion on the subject.

The *Catalytic Value* for *bankers* is *justice*. They have a drive to see that their *knowledge* is fairly applied to all people and all situations including themselves. This sense of *justice* when directed outwardly toward society is what makes *bankers* take action, it makes them want to share their *knowledge* with the world, freely, openly.

It is very difficult, even for very mature *bankers* to continue sharing their *knowledge* when they feel they are unjustly treated or when they see their *knowledge* being misused by others for unjust causes.

The self-respect of a *banker* is founded in the sense of worth, the value of his or her personal *knowledge* and expertise. The only thing that makes a *banker* act out in negative ways is the reality or the belief that her *knowledge* is not valued or is not being appropriately applied. When a *banker's knowledge* is not treated justly, a *banker* suspends the personal requirement to seek justice for others.

Our Deepest Fears

The deepest fear associated with each *core value* is the opposite of that *core value*:

Knowledge people fear being ignorant, without any worthwhile *knowledge*.

It is understandable, that when people lose their sense of being a positive contributing presence, whether that sense of being is one of *power*, *wisdom*, *love*, or *knowledge*, their dark side comes out to protect them. None of us is very attractive or welcome when our negative conflict strategy is the only energy we are emitting into our surroundings.

Contributions to the Team

The influence of a *banker* rests in their ability to conserve resources, ensure longevity, and stabilize their businesses. These contributions are supported by their organization skills. *Bankers* are insatiable information gatherers. Data is always at their fingertips and they don't miss details.

They are like magnets dragged through sand, collecting all the valuable shards of fact. The *knowledge* the *banker* gains from this information makes them invaluable; they are a wealth of information for others who wish to explore their library-like minds.



Bankers are committed to assuring that whatever is done is successful. Their compulsion to be right or to be seen as being right allows *bankers* to possess extraordinary staying power. They never give up. They keep trying, keep doing, and keep analyzing until, often by perseverance alone, they succeed where others have failed.

They are extremely cautious and adamant about not launching the ship before its seaworthiness has been tested. In situations that require action, the influence of the analytical *banker* is mandatory. Without them, actions are taken without sufficient thought, directions are changed without considering long-term ramifications, and new innovations are put into play without regard to service problems, system failures, or customer satisfaction.

Without *banker* energy in every sales department, production shop, and marketing office, the number of repetitive mistakes buries the business. Opportunities are lost, orders are misplaced and forgotten, and shipment schedules are considered a nuisance. *Bankers* are unwilling to be part of an operation that doesn't fulfill its commitments. They will do almost anything to make things right.

The analytical skills that *bankers* possess compliment those of the *innovator*. *Bankers* serve *innovators* well by providing analysis and accrued information that keep the *innovator* on track and confident of the solutions they create. A *banker* will then take the solutions presented by the *innovator* and formulate them down to the task level, understanding the interrelationship of all elements.

Impositions to the Team

Although the *bankers'* organizing and analytical skills are an asset to their companies, they often tend to over-organize, over-correct, and generally over-manage everything. These behaviors are especially prevalent in the early stages of company development, when open, creative action, and experimental strategies are rampant. The entrepreneurial, early company development phase is essentially contrary to most *banker* motivation.

Bankers are similar to *builders* in their inattention to team building. They are much more concerned with the details and knowing where everything is and how it works. Preserving their systems is more important to them than creating dynamic teams. This value often causes *bankers* to conflict with *merchants*, who place highest value on relationships.

The caution of a *banker* frustrates *builders* immensely. A *banker* will seldom make a decision except by omission or delay, but a *builder* prefers to make decisions on the fly.

Bankers also frustrate merchants, but more typically they are frustrated by *merchants*. The constant stirring up of opportunity and the typical lack of value *merchants* tend to place on completion of projects and lack of concern for details keeps *bankers* constantly feeling under-informed and off balance, two feelings *bankers* despise.

A *banker* who has strong *merchant* characteristics or strong *innovator* or *builder* traits can succeed admirably as a leader in a new enterprise. They must be willing, however, to keep their own dominant *banker* trait in check until there is truly a need for it in the business.

Scenario Seven

Caroline is a banker/builder. She is CEO of an IT technology company with dozens of project managers, software development people, and senior account executives assigned to her larger clients. She naturally builds relationships with major accounts through outstanding service and a get-it-done follow-through.

One of her account executives had recently quoted a fixed fee service change order to a major client on a highly visible project. The account executive did not take into account the fact that the client was still working to develop a specification for the scope of work for the change order.

A team was assigned, enlarging the on-site personnel to almost 50% of Caroline's total employee base.

After six months, with almost a million dollars in sunk costs invested, the client decided that the scope of work was not appropriate. They called to stop work, asking for a review of the total project. A six month review period was prescribed. Caroline was livid. Her company's finances were imperiled and the client was being cavalier about time lost and about making any sort of accommodation of payments to a key supplier.

Caroline's patience was gone. She called a meeting with her account executive and project managers on the account. She heard nothing but excuses and became very angry that she had sat back and allowed this team to use

their own judgment, which now had put her in an embarrassing position.

She fired the account executive and went to the client to take over the account. She had all of her ducks in order and proceeded to illustrate how everything that her team had done was right and effective and deserved payment. Everyone on the client team felt that they were made wrong by her presentation. She had not gotten a good enough picture from the merchant/innovator account executive about the client's team and their expectations. She also, in her effort to show strength and right thinking, misjudged the client's willingness to cut their losses and run.

The long and short of this story is that Caroline lost the contract and spent the next two years trying to collect \$500,000 from a client who did not feel obligated to pay. By the time we got involved as a turnaround management company, Caroline's company was in deep distress. She had lost most of her core team and found herself alone, but still certain that she was right and that she had taken all of the right steps.

During our efforts to help her see the impact of her own actions and decisions, she withdrew from any contact with us, gathered a few of her remaining team around her, and sized down to a smaller version of her old company with a few long-term, easy-to-manage clients. Her account executive was hired by her problem client and went on to finish the project with an internal staff.

When a *banker* bases her business decisions on cold, hard, right information and right argument, she is at risk of making everyone around her feel wrong and harshly judged. This kind of black-and-white thinking, followed by rigid decisions that do not factor in human emotions and feelings, sets her up for strong rebuttal and argument from others, a refusal to cooperate by others, and a mutiny of her strongest contributors.

There is not much value in being the captain of a ship that is foundered on the rocks, the crew overboard, all cargo lost.

When being right is more important than being effective and strategically smart, the *banker* strategy, in this case pushed forward by a secondary value, a *builder power* driver, is a wrong tactic and one that leads to undeniable failure. A failure created by a person who was right, is still a failure.

When a *banker* gets pressed, pushed to the wall, forced to make a decision or act against her analytical conclusions, she may simply disengage and back out. *Bankers* will judge others to be wrong, and withdraw their trust of those people. They may withhold information to regain control, and they may use that information to undermine others when the opportunity arises.

Bankers dislike conflict, and this causes them to make promises they do not intend to keep. They will either make these empty promises, or they will simply say a flat, unqualified “No” to everything, hoping that this simple act will be powerful enough to cause others to draw back and surrender. When *bankers* feel out of control, they become aloof, untouchable, unreasonable, intractable, unresponsive, unavailable, and busy.

Bankers who are acting out of their strengths are invaluable. The power of a *banker* as a business leader comes from their hatred of waste and distaste for risk. These values can cause the *banker* to feel out of control, in high-risk situations when resources are limited.

The *banker's* drive to get back into a secure position will cause him to rely more heavily on the *merchants, innovators, or builders* around him. This drive to create something solid and resistant to outside pressures makes a successful *banker's* company recession-proof, highly resilient, and seldom under-capitalized.

Some of the things you will hear Bankers say are:

“No. Can't be done.”

“Go ahead, if you really have to.”

“I told you...”

“I'm studying that right now.”

“Not with my money.”

“We've never done it that way before.”

“Even if we succeed, it won't be enough.”

BANKER— Learning Style

Read and Analyze

The *Read and Analyze* learning style is very straight forward. There should be almost no talking without details, information, charts, graphs, and statistics. If you don't give this group something concrete to memorize, you won't get high marks for teaching. Reading materials that offer hard evidence plus the opportunity to analyze, dissect, and re-organize is the core ingredient. Methodology, mathematics, historic proofs, and precise experimentation cause these persons to engage and learn.

The *core value* that must be honored for *bankers* is *knowledge* (the how and why of things). Don't bother trying to teach them anything if you can't substantiate it, or better yet, if they can't substantiate it. *Read and Analyze* people value *justice*. They like being asked to determine the level of justice and appropriate responses in situations. They also like to create a presentation of *knowledge* that is easily conveyed to others. Give them

BANKER: negative traits

- Cold
- Unmoving
- Always Right
- Judgmental
- Myopic
- Indecisive
- Withholding
- Reticent

BANKER: when we are pushed

Back Out

- Back Out
- Play Victim or Judge
- Talk About the Past
- Promise
- Pretend Capitulation
- Say No, No, No
- Re-organize, Re-analyze
- Politic
- Passive/Aggressive
- Undermine
- Criticize
- Judge Our Own Imperfection
- We Outlast You

lots of opportunity to create their own demonstration of *knowledge*, or identify and prove an injustice.

Teaching Methods that Don't Work for Read and Analyze People

It is not effective to ask *Read and Analyze* people to be highly spontaneous, to do role playing, or to make off-the-cuff presentations. They like to be perfect and right. Don't put them in situations where they may be made to look ignorant or foolish. Don't give them a lot of verbal information. Put things in writing. Don't offer information that they can't use or that is beneath their developmental level. And don't just hand it to them. Make them work to find the data and work to analyze and reconstruct data into an analytical form.

Don't ask them to make snap decisions. Don't expect dyad work at an intimate/relational level. Don't ask for solutions to complex problems, especially abstract problems. These people like to be concrete and linear in their thinking.

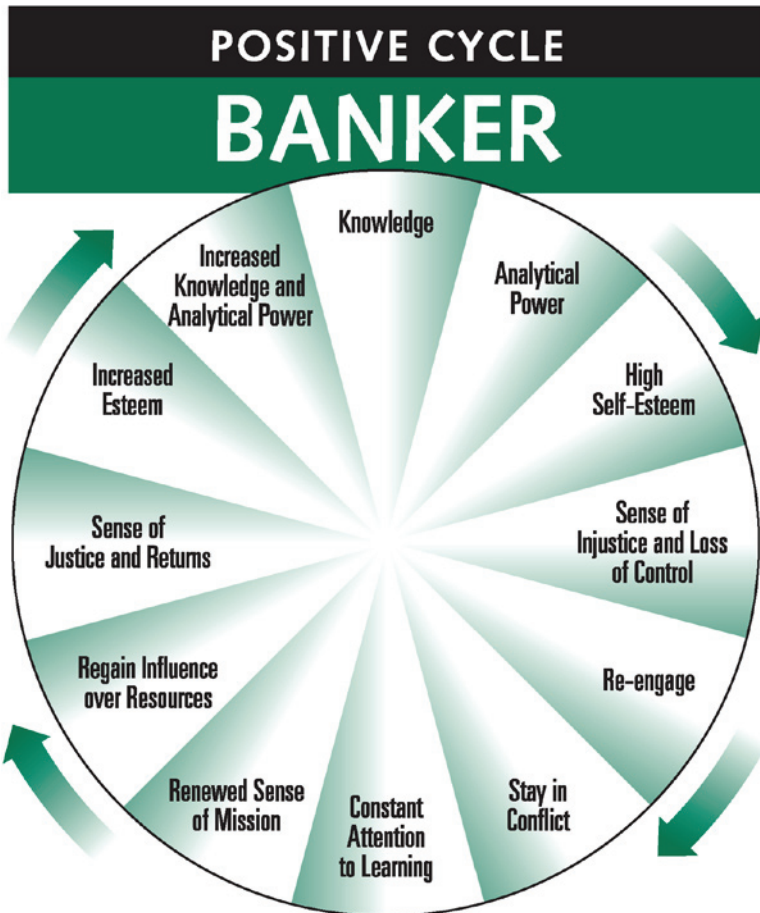
Bankers learn through analysis. They are highly visually oriented, like to sit and listen and take notes. They like to record hundreds of facts and figures, see proofs actualized, hear evidence that supports the visual data, and then be given an opportunity to rearrange the data so it is more perfect.

Give *bankers* the task of recording all learning information, of researching additional information which supports or refutes that which is presented, and then presenting in visual form the results of their findings. Put it in writing.

Bankers learn by analyzing data, mostly from visual sources or formal presentation. Give *bankers* games to play and too much free time and they'll freeze up and refuse to participate.

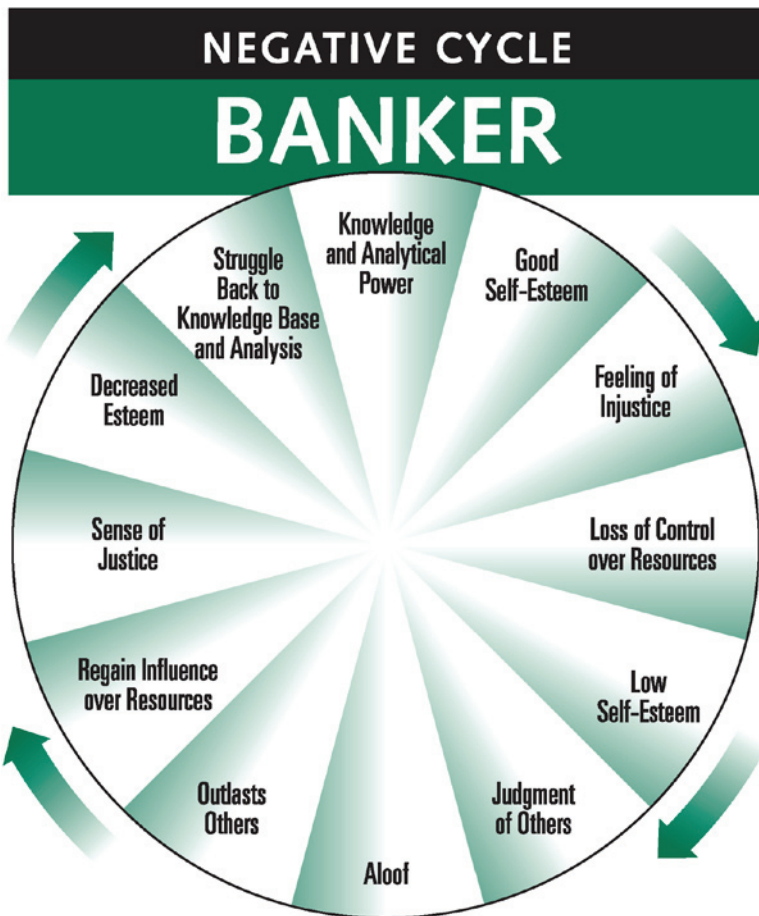
Building Self-Respect

The *banker* derives self-respect from the apparent need for and the level of quality of *knowledge* that is essential to the situation. The *banker's* strong sense of *justice* is kept in good order as long as this feeling of esteem is in place. But when a situation becomes too risky, or people seem to not value *knowledge*, or when the *knowledge* given is not used to make good decisions, the *banker's* esteem is deflated, and the sense of *justice* magically disappears. The *banker's* self-respect is replaced by a harsh aloof judgment of others. The world, after all, is not valuing the *knowledge* offered so there is no longer any requirement for the *banker* to be the source of *knowledge* for an unjust world.



The mature *banker* remains true to her own sense of *justice* and relies upon the founding quality of real expertise, real *knowledge* to eventually rule. And, having applied her thirst for *knowledge* first to self-awareness, the mature *banker* is quick to recover from an attack of defensive aloofness.

The *banker's* self-respect is founded in *knowledge* and measured by a sense of justice. No amount of *power*, *wisdom*, or *love* can provide the *banker* with self-respect. No amount of *intimidation*, *interrogation*, or *manipulation* will prevail against the *aloof judgment* of the disappointed *banker*. All such attempts to control an *aloof banker* is a waste of energy.



10

The Six Contributor Types™

Note: If your Primary *Type of Contribution*™ is intuitive, this *Type of Contribution* results from high *core value* preference in the *merchant* and the *builder* quadrants. You may have dominant *builder* values and secondary *merchant*, or you may have dominant *merchant* values closely followed by *builder* values.

You will find immediately below, the common description under intuitive *Contributor Type*™, starting with *builder/merchant*, with a following note on the difference between this operating structure and the *merchant/builder* operating structure that also expresses itself as intuitive *Type of Contribution*.

This approach is used for all twelve primary *Contributor Types* to keep things from being too repetitive.

While each *Contributor Type* has positive strategies that lead to success, each also has its blind spots and weaknesses. It is this combination of high benefit and significant challenge that each of us brings to our work team and to our families and friends.

Independent Contributors

Shared Values

Innovators and *builders* both value monument building. *Builders* like to leave monuments demonstrating their powerful presence on Earth in brick, stone, and tangible materials. *Innovators* love to leave their monuments in the form of systems, new products, and innovations.

Builders and *innovators* like to participate in solving problems. The *innovator* wants to make an assessment and find the right solution, while the *builder* instinctively knows what to do and wants to immediately fix the problem, his energy being the solution.

INDEPENDENT CONTRIBUTORS BUILDER/INNOVATOR (Innovator/Builder)

Power combined with Wisdom	
BUILDER	MERCHANT
<i>Gut Level</i> <i>Decisive</i> <i>Powerful</i>	<i>Inspired</i> <i>Energized</i> <i>Exciting</i>
BANKER	INNOVATOR
<i>Analytical</i> <i>Formulative</i> <i>Solid</i>	<i>Perceptive</i> <i>Adaptive</i> <i>Resourceful</i>

Contributions to Team

Business situations that require lasting structure or systems to be built must have a *builder/innovator* at the helm. Whether the requirement is to make something that is complex simple, or to take a simple system and make it more robust and responsive to current needs, the *builder/innovator* is the person for the job.

Independent contributors conceive appropriate solutions and take immediate action. Implementing a solution to a problem is a rich form of reward for the *builder* and seeing a system put into effect is the highest praise for an *innovator*. So in the *builder/innovator* we have a person who designs a monument and then builds it.

Independent contributors are not intimidated by much of anything except intimate relations and speaking to crowds. Their *innovator* values make them resourceful, clever, inventive, and able to teach others. Their *builder* values

make them agile, constantly in motion, and powerful in command. They derive their own solutions and put them into action without hesitation.

In rapidly changing environments, failing situations, and extreme growth opportunities *builder/innovators* are unbeatable. *Independent contributors* have the answer to every question and the *power* that can do anything. Their *innovator* values cause them to develop one irrefutably valid solution after the next, and the *builder* in them either pushes everyone out of the way, while they implement the plan, or they pronounce their edict: “Just get it done,” often adding, “If you can’t do it, I’ll get someone who can.”

Independent contributors are the most self-sufficient value type. They know how to derive a good strategy from a challenging situation, and they are willing to immediately effect the right actions. Since proof of personal *power* and *wisdom* is their driver, there is little value placed upon teamwork or communication with others.

Impositions to Team

The disconnected nature of a *builder/innovator* gives his team a significant challenge. How can we make the greatest use of this person but get cooperation with systems and processes the team deems to be essential? How can we get this *builder/innovator* to communicate more often and allow others to participate with him, both in the assessment and problem-solving mode and in the get-it-done mode?

Although these powerful individuals are good in isolation and thrive on independence, they chafe under someone else’s management. If given a general idea of the problem to be solved or the monument to build, they will find a way to get it done; but you must give them their head and stand back a little.

Without an open range to work in their energy turns from creativity and action to clever evasion of restrictions, anger, and invisibility. “Where is she?” and “What is she doing now?” are questions often asked of *independent contributors* by the people around them.

Scenario

A small group of business consultants had developed a very successful general business management practice. One of the three partners was a profound builder/innovator. He excelled in difficult production situations, solving his client's immediate problems and providing the push energy needed to get teams re-motivated and on track.

He was reluctant, however, to bring his other partners into companies where he was the lead. Because of this reluctance, his clients tended to make near-term progress, especially in production, but dragged their heels in sales and were left without sufficient cash flow due to insufficient attention.

His independence finally became a burden the others could not continue to tolerate, since his production of client revenues was less than one-sixth of the company's total while he continued to take home one-third of the profits.

On repeated occasions, when approached with the requirements to become more of a team player, he would often express willingness to improve his team play, but repeatedly would fall back into his independent habits. He was finally asked by his partners to leave.

Since *builders* are impatient with the world, they consider any teaching time to be “baby-sitting.” *Independent contributors* are convinced they are self-sufficient. Since they are impatient with anyone who does not exhibit the get-it-done attitude, they also do not have time to be taught or challenged, so their personal ideas may be generally held as the only ones with any merit.

Practical Contributors

Shared Values

Builders and *bankers* both value “being right.” These people tend to think that they are never wrong. *Builders* believe they are never wrong because they are acting from the gut, and who can challenge the validity of a gut instinct? *Bankers* believe they are never wrong because they have the data to back up their actions and conclusions. They can prove they are right if you

are intelligent enough to understand their proof, and they will be happy to prove you wrong anytime you choose to disagree with them.

When a *practical contributor* is right in his conclusions, they are a powerful steady force that creates firm and unwavering forward motion.

Contributions to Team

Businesses that require high levels of detail, have a high volume of transactions, or have their basis in technical *knowledge* must have *practical contributors* in leadership. The *banker's* commitment to details, *knowledge*, being right, and following through are invaluable in these situations.

The *builder's* ability to take actions and make decisions help them manage their *banker* values, when in the midst of massive data and volumes of statistics and regulations.

Practical contributors are tough people to get around. Their belief that they are always right makes them self-assured and motivated to achieve successful results and to excel with legal and moral appropriateness. They tend to set a course, hold to it, and do whatever is required to make certain they are able to do so.

Practical contributors take risks that are well considered and backed by sound reason and fact. These people run organized beta test sites for new products or take firm leadership in professional service companies such as CPA firms, attorney partnerships, and mutual funds.

Practical contributors present themselves as masters in their field, as they often are. They tend to be well educated, to speak from *knowledge*, and to make demands of others which fit both the person and situation.

PRACTICAL CONTRIBUTORS	
BUILDER/BANKER (Banker/Builder)	
Power combined with Knowledge	
BUILDER	MERCHANT
<i>Gut Level</i> <i>Decisive</i> <i>Powerful</i>	<i>Inspired</i> <i>Energized</i> <i>Exciting</i>
BANKER	INNOVATOR
<i>Analytical</i> <i>Formulative</i> <i>Solid</i>	<i>Perceptive</i> <i>Adaptive</i> <i>Resourceful</i>

When a *practical contributor* completes a task, it has usually been completed on time, under budget, and with excellent attention to quality. *Practical contributors* build efficient, practical, durable, and financially solvent operations. They are not willing to do less.

Impositions to Team

Because *practical contributors* value being right, they can be, or appear to be, extremely arrogant. They may have a great deal of trouble building a team around them. What the *builder* in them is not able to make happen can be immediately explained by the statistics and information generated by the *banker* side of their *Core Values Nature*.

The *banker* side can prove that the facts are right and the conclusions are black and white, while the *builder* side trusts his intuitive judgment completely and is unwilling to be challenged for fear that his sense of sufficiency may be threatened; his *faith* in his own *power* and intuitive judgment reduced.

Practical contributors are so self-assured and so unwilling to be wrong that they may overpower others around them. These people are more likely to find a way to “run” the business from second- and third-level positions than any other value set. *Practical contributors* can be so certain they are right, that they don’t bother to gain consensus for their actions or check to see whether anyone else is enjoying the business process.

These people can sometimes burn the energies of others either through erratic commands or stubborn refusal to make a decision. They are often known for making a decision one day and remaking it the next. The *builder* tends to make a quick decision, and then their *banker values* cause them to back-pedal based upon a new understanding of information.

This happens often when the *banker*-driven computer files are reviewed at home while other people are sleeping. Each time they change their minds, they come back with a forceful command for absolute, unquestioning obedience from the team.

People with strong practical values don’t naturally value *merchants* and

tend to be impatient with *innovators*. The creative-type person can seem unfounded and even lazy to the *practical* person. *Practical values* honor work and results and visible accomplishments.

Highly creative people can feel fully actualized by having and presenting a great idea, by helping to get other people excited about a common goal. This is the work that they do. *Practical contributors* have a great deal of difficulty seeing the value in this contribution, when compared with their own practical, measurable results.

When wrong, the *practical contributor* can be a belligerent, immovable force. They may be willing to make every challenge to their standards of perfection, and every decision a battle for control. The *practical contributor* makes it seem that there is never a doubt about their own conclusions.

It is impossible for *merchants* and *innovators* to know when to go to battle with the *practical contributor*. They are so certain of their *knowledge* and so comfortable with their compulsion to act, they can cause others to feel ignored and made to be wrong in one situation after the next.

Intuitive Contributors

Shared Values

Builders and *merchants* are both *intuitive* in their thinking. *Builders* value acting from the gut, from impulse. *Merchants*, also *intuitive*, value acting from inspiration. Both of these values rely on spontaneity. *Builders* and *merchants* tend to act without a lot of thought or second-guessing. They tend to make quick decisions based upon the way things feel, the way they feel about things. They believe in their capacity to know what to do next, so planning is not crucial.

Contributions to Team

When the situation calls for someone who will roll up their sleeves and get to work, always keeping high-quality relationships and the long-

term vision in mind, an *intuitive contributor* is the best person for the job. If decisiveness, energy, heart, enthusiasm, strength, openness, and spontaneity are also required, the *intuitive contributor* is unbeatable.

These people know how to work and how to get others to work with them. The *builder* in them is a doer. If there is too much work for one person, the *merchant* in them will motivate and teach others what they need to do to help the *intuitive contributor* succeed. This valuable combination of action aligned with vision, doing aligned with teaching, and results aligned with solid relationships creates an irresistible force. This is a force that works with both the push and the pull strategy.

INTUITIVE CONTRIBUTORS
BUILDER/MERCHANT (Merchant/Builder)

Power combined with Love	
BUILDER	MERCHANT
<i>Gut Level</i> <i>Decisive</i> <i>Powerful</i>	<i>Inspired</i> <i>Energized</i> <i>Exciting</i>
BANKER	INNOVATOR
<i>Analytical</i> <i>Formulative</i> <i>Solid</i>	<i>Perceptive</i> <i>Adaptive</i> <i>Resourceful</i>

The action of the *builder* creates worth, and the vision of the *merchant* creates excitement. The *merchant* teaching abilities release new energy and expand capabilities. The *builder* decisiveness generates bottom-line results. The value that the *merchant* places on relationships builds trust and loyalty. The *intuitive contributor's* practicality commands respect, and his creativity builds appreciation in others.

Intuitive contributors are not good in isolation. The *builder* side requires someone for them to show and command, and the *merchant* side needs an audience with whom to share their vision and all related successes and failures.

So if building a team rapidly is required, if opening a new sales territory is the task at hand, or if a new business enterprise is being launched, an *intuitive contributor* is the most likely candidate to succeed.

Impositions to Team

Because *intuitive contributors* possess so much confidence in their ability to know what to do next, they may become so enamored with their ideas that they take one dramatic action after another, leaving a trail of incomplete assignments and disappointment behind them.

Their spontaneity creates an incredibly fallow field for *innovators* to play in and an endless vacuum of fact and balance for a *banker* to set straight. Actions are taken that have to be corrected.

The opposing values that an *intuitive contributor* possesses also cause conflict. The “get it done now” attitude of the *builder* contrasts with the cajoling, joking, and inspirational attitude of the *merchant*. The *builder* values are willing to put relationships at risk, while the *merchant* values are willing to risk poor results in order to preserve relationships. These opposing values can cause behaviors that make them appear inconsistent and even “two-faced” to others.

For instance, if a person’s *merchant* qualities are in control of a situation, he could be patiently teaching a co-worker how to perform a task. All the while, he is being friendly and working on building a relationship with this person. Then without batting an eye the *builder* side kicks in, and he switches without warning to blustering dynamo of demand. “Just do it,” he may command.

I have witnessed an *intuitive contributor* make one decision, set a course of action, be challenged by her team, deny responsibility, change her mind, set a new course of action, charge the team with a requirement for results, and take off on a new idea all within the course of a few sentences and never miss a beat.

These people are explosive and exciting to be around. Damage control may be a common necessary task for the members of an *intuitive contributor’s* team.

Cognitive Contributors

Shared Values

While *builders* and *merchants* are intuitive in their thinking, *innovators* and *bankers* are *cognitive* in their thinking. All *innovator/banker* thinking is guided by reason. *Innovators* and *bankers* both value making decisions based upon assessment and analysis. They make decisions based upon what they think or know versus what they feel.

While *innovators* have leaps of *intuitive wisdom*, they pride themselves on being rational and thorough in their assessments and wise in their prescribed solutions or designed systems. *Bankers* work to make everything efficient, and *innovators* develop processes and systems to support this goal.

Bankers defend and honor the systems *innovators* develop, even against constant *innovator* innovation. Their unified goal is to have efficient, elegant systems that actually do what they are designed to do without wasted effort or mental energy.

COGNITIVE CONTRIBUTORS BANKER/INNOVATOR (Innovator/Banker)

Knowledge combined with Wisdom	
BUILDER	MERCHANT
<i>Gut Level</i> <i>Decisive</i> <i>Powerful</i>	<i>Inspired</i> <i>Energized</i> <i>Exciting</i>
BANKER	INNOVATOR
<i>Analytical</i> <i>Formulative</i> <i>Solid</i>	<i>Perceptive</i> <i>Adaptive</i> <i>Resourceful</i>

Contributions to Team

Cognitive contributors are rationally based, working from fact, provable systems, and logical flow. A person with this *Core Values Nature* can rapidly assess a situation and come up with multiple solutions or systems to support the stated objectives. Once conceived, the ideas are analyzed, organized, proven on paper, and perfected in documentation.

Any practical business needs creative solutions. When the situation calls for reducing complex problems into workable solutions, the contribu-

tions of a *cognitive contributor* will be appreciated. When abstract concepts and difficult issues resist effective implementation, the *cognitive contributor* becomes irreplaceable.

The power of *cognitive contributors* in areas of product or system design echo the strengths just discussed for the *merchant/banker* in risky business situations. The *cognitive contributor* is prone to push the technological or systems horizons. The *innovator* struggles to create the best possible end product. The *banker* in them worries about the details, identifies design flaws, challenges and documents each step before and after it occurs. Combined, these values assure maximum likelihood of success.

Cognitive contributors, therefore, are the most likely values type to push the limits of new products or system development, coming up with true innovations that actually work. There is nothing more valuable to an engineering design team than unlimited innovation balanced by the ability to design such an innovation to perfection, ending up with documentation that carries all the way through production. This same capability is also invaluable in designing new sales processes or in the conception of new service contracts.

Impositions to Team

Cognitive contributors have a difficult time making decisions because of their *cognitive* thought process and their need to thoroughly analyze and assess situations. Although the *banker's* aversion to risk causes them to quickly make a decision in the negative, to say “no” without thought is not making a decision.

Their thought process when making decisions tends to create an endless loop. First they need the information that provides evidence in order to create new solutions. Then the new solutions need proof to validate that they will work, and this can only be derived from further information.

When *cognitive contributors* go into their “no decision today” lock-up, there is no way to get them out of it. The *innovator* side gets stubborn and they isolate themselves from others until “I can figure this out.” The *banker* side sets into motion a protracted data gathering and analysis cycle

that “only I can manage.” This posture is impenetrable, unless a courageous *builder* simply puts himself at risk and takes unilateral action.

A *cognitive contributor's* only means to success is through attracting *merchants* and *builders* who have strong enough personalities to act on their own authority and not wait for the *cognitive contributor* to make a decision. They must also be willing to tell the *cognitive contributor* that some of the information they “need” is not required to get things done.

Community Contributors

Shared Values

Merchants and *bankers* share the concern for good *community*. They each want the environment at work and within their social group to be a good and beneficial environment.

Merchants want everyone to feel welcome and accepted. They want people to speak gently to each other and to hold each other in high regard. *Bankers* want everyone to be secure and to protect each other. They want everyone to respect the systems and laws of the *community* and to treat each other with respect. Both *core value* strategies work to ensure equity, *bankers* concentrating on justice, and *merchants* focusing on fairness.

Contributions to Team

The worth of *community contributors* is best seen in situations that require highly technical or profuse *knowledge* that needs to be disseminated to others, or situations in which the demand for risk is high and the need for detail and follow-through is extreme.

Merchants handle risk very well and *bankers* are always considering how they will survive catastrophe, warning their community about eminent dangers and future costs of present actions. *Community contributors*, therefore, are able to play the edge of risk better than any other value set and survive the experience.

Since the *merchant* impulse is to dream and head toward a brighter future, the balance in the *community* type of values can be an immense asset. The *banker* nature will constantly be looking for ways to assure longevity, survivability, and cash strength.

The *merchant's* inspired activity will be modulated to a more rational set of activities by the *banker* mind, making this *Core Values Nature* one that sets many things in motion, completing them all to near perfection.

The *community contributor's* capacity to keep many balls in the air and to develop unmatched staying power, assures these persons of staying at play longer than others, being able to go after more opportunities and have something to show for it in the end. When long-term relationships and long-term results are the desired outcome, a leader who is a *community contributor* will provide maximum assurance of a positive outcome.

Impositions to Team

The opposing values of *love* and *knowledge* make *community contributors* prone to a little social inconsistency. When they shift into their *merchant* role, they are charming, visionary, and full of energy. They tend to be a surprise to the people around them, because in business their *banker* values often cause them to hide their *merchant* characteristics for fear of being perceived as being silly or unprofessional.

COMMUNITY CONTRIBUTORS MERCHANT/BANKER (Banker/Merchant)

Knowledge combined with Love	
BUILDER <i>Gut Level</i> <i>Decisive</i> <i>Powerful</i>	MERCHANT <i>Inspired</i> <i>Energized</i> <i>Exciting</i>
BANKER <i>Analytical</i> <i>Formulative</i> <i>Solid</i>	INNOVATOR <i>Perceptive</i> <i>Adaptive</i> <i>Resourceful</i>

This can make them appear to be insincere when they are operating from their *love* values, or they can be experienced by some as unfeeling and cold when they are operating in alignment with their *knowledge* values.

If they allow themselves to be promoters at work they will often make announcements around new plans and visions on one day and come back the next as their own worst enemy, the *banker* in them playing the role of devil's advocate.

This sends no small amount of confusion into the team. *Community contributors* will tend to be impatient to get things moving, but then direct everyone around them to satisfy the *banker's* need for having total information and validation. They may come up with great ideas, but they will sabotage these ideas constantly with their own demand to have perfect proof of application.

Scenario

Cliff, the idiosyncratic story-teller on the TV sitcom "Cheers," is a good example of a poorly performing community contributor. He has gleaned and garnered thousands of bits of highly interesting information (some of them highly interesting) and thrown them in with a million bits of fact that no one else cares about.

Then his merchant takes over and demands the spotlight, displaying his knowledge as though on stage, seeking to entertain and impress the multitudes. He is the epitome of a community contributor at his worst.

Community contributors may be negative or indecisive one day and solicitous and inspirational the next. Frustration comes from the *banker*, who expects perfection in implementation. Solicitation comes from the *merchant*, who doesn't want to look like an angry person, for fear that all of their friends may go away.

There is also a tendency in the *community* type of person to pay too much attention to what is fair, to constantly call attention to things they deem to be unjust. This type of individual can be seen by others as high maintenance persons, who demand attention to their concerns about almost everything, before they are willing to proceed and just get things done.

Creative Contributors

Shared Values

Merchants and *innovators* both value being needed, either for their solutions and technologies or for their humanity, creativity, and *love*. This need to be appreciated drives them to achieve long-term relationships and to develop products and systems that ensure the longevity of the relationships that are formed.

Contributions to Team

The power of a *creative contributor* is derived from their inexhaustible well of good ideas and new strategic innovations. This creates a deep sense of optimism. If the *merchant's* dream is not being realized, the *innovator* can kick in and come up with the appropriate solutions.

When the *innovator's* solutions do not align perfectly with the *merchant's* vision, a new vision is deftly formed. This new vision can encompass the solutions and systems that the *innovator* has conceived and still achieve all of the basic values desired by the *innovator/merchant*.

This constant creativity makes the creative contributor an invaluable resource in companies where technologies are changing rapidly or competition puts new demands on the marketing and sales systems of the company. This kind of person fuels the irrepressible optimism of an entrepreneur and maintains a positive attitude in times of diversity through sheer tenacity, sometimes stubbornness, and always optimism.

CREATIVE CONTRIBUTORS	
INNOVATOR/MERCHANT (Merchant/Innovator)	
Love combined with Wisdom	
BUILDER	MERCHANT
<i>Gut Level</i> <i>Decisive</i> <i>Powerful</i>	<i>Inspired</i> <i>Energized</i> <i>Exciting</i>
BANKER	INNOVATOR
<i>Analytical</i> <i>Formulative</i> <i>Solid</i>	<i>Perceptive</i> <i>Adaptive</i> <i>Resourceful</i>

Creative contributors are often chosen as sales representatives. They can sell anything because they build relationships and they understand their products and how to make them fit into a broad range of customer situations. It is important for them and for others to realize that their creativity driver also undermines their sales vocation in some selling situations. The repetitive requirements of the selling process and the requirement for practical measurable results push against their strong creative, impractical natures.

Creative contributors are not put off by a problem of any magnitude. In fact, their sense of personal esteem is often based on the size, difficulty, and worthiness of the problems they have before them. They look for opportunities to demonstrate their prowess at problem-solving or at turning around difficult relationships that are at risk.

Creative contributors are the go anywhere, do anything kind of people. They are even able to function for extended periods of time in remote, somewhat isolated situations as long as the sense of connections and personal worth is maintained for the *merchant* side of the index.

For the *innovator*, the absorption into the problem-solving aspects of any assignment will carry them a long way, as long as there remains an opportunity to observe others evaluating and appraising their work once it is finished.

Creative contributors, despite their ability to sustain themselves independently, thrive best in a team environment. They are excellent team builders and are the best teachers. They not only are good at planning a curriculum and basing it in logic and reasonableness, but they pay attention to environment, entertainment, energy levels, and motivation.

This creates exciting and provocative learning situations. *Creative contributors* tend to be able to keep so much energy swirling around them that they attract others. Even *builders* and *bankers* enjoy a symbiotic relationship for a while.

Impositions to Team

Unrestrained creative people can be a real challenge to their teams. The *merchant* is constantly thinking of new projects and new adventures, and avoiding non-creative, boring work. There is always a brighter future or a glorious past accomplishment that will distract others from the need for accountability today.

And the *innovator* lives off of new challenges and great new strategies. This *wisdom* driver has done its work when a strong new strategy is conceived. It often requires others to actually do something with the idea.

Creative people can be difficult to manage because they are also *creative* about the way they present themselves and *innovative* about the way they can avoid practical requirements. They are lovable and admirable people, difficult for others to criticize or hold accountable because they are such wonderful people and also sensitive to criticism. This makes it difficult for managers to be tough on them even when it is obvious that this is necessary.

Innovators hate to bring the process of problem-solving to a close; they are constantly caught up in the seduction of a new idea, a difficult conundrum. Solving problems is their highest form of pleasure. But more important, it is their greatest contribution. The *merchant* in them keeps new things coming, and their *innovator* keeps everything that was stirred up before “in the works.”

There is a little attention to detail and hard facts, but more to thoroughness of assessment, using all five senses, gathering all evidence. The next new idea takes 110% of all energy, so things tend to be constantly left up in the air. If you are a *creative contributor*, be certain you are surrounded by high-energy *builders* who will tell you to “get it done,” as well as a few level-headed *bankers* who will occasionally ask, “Are you serious?”

Summary of the Six Types of Contributors

Just as in our discussion about the four primary *core values*, *knowledge*, *power*, *wisdom*, and *love*, in the *six types of contribution* there is not one of us (according to our growing number of participants) that is purely any one thing. In fact, our data has shown that no one has ever chosen 100% of any *core value*. And no one has ever chosen less than three of the strategic and tactical values that align with each of the *core values*. The same is therefore true for all six of the *contributor types*.

Everyone we have tested, now more than 50,000 *CVI* users, has chosen some of the value words that point to each *core value*. They have all chosen some of the values that cause him or her to prefer making certain kinds of contributions, but never all of the values that align with their most dominant type of contribution.

So, you see, you and I, and everyone else it seems, is made up of the same innate natural ingredients, but in different amounts. In fact, in just about every different mixture imaginable, which makes us all so very different, while all being so very much the same.

The greatest similarity we have with each other are the four basic *core values* that make up our unchanging innate nature, our motivation to make certain *types of contributions*, but based upon a unique mixture of the same kinds of motivations and essential energies.

There are now more than 6.7 billion people living on our planet. Still, your life and my life are unique. We are made unique by the difference of the pairings of our parents and our parent's parents; just as we are unique in the makeup of our essential human nature. We call this innate, unchanging self the *Real Core Values Self*. We are unique in our capacities to express or deliver our *core values* to society.

We have provided on the next page, *The Odds Are*, a graphic representation of this *core values* uniqueness. Just the limited and simple picture of this innate unchanging self that our simple *Core Values Index* provides, shows us that you and I are not likely to be the same. In fact, the likelihood that you and I will have the same *core values* makeup is:

THE ODDS ARE

10,314,424,798,490,500,000,000,000 to 1.
Population of the Earth 6,700,000,000

It will be a long time before any two of us are born with identical innate values.

**Odds That You and I Will Select All
of the Same Tactical Values in the CVI**

10 Octillion
314 Septillion
424 Sextillion
798 Quintillion
490 Quadrillion
500 Trillion
to One

Or, 229,771,103 times the Earth's population squared.

These are the odds that
you and I will select all of the same
Strategic and Tactical values in
the Core Values Index.

What is the likelihood that you and I are identical physically—with the same set of skills and the level of capability? Although the number above is accurate and statistically precise, we can see a similar indication of uniqueness by building a model that computes how many people have lived on this planet since the beginning of human time.

You can study the formula we used in the appendix of this book. The estimated number is staggering: 68 billion total humans may have lived and died on this planet. Each one of us is unique, both in the nature of *Who we are* and also *What we are.*

It is this very uniqueness both in physical and spiritual nature that causes us to have the same universal call; the call to be our unique selves and to find our unique place in the lineage of Man and in the habitation of Earth. We all have the questions alive within us: *Who am I? What am I? Why am I here?* We each have an unremitting drive to make a worthwhile contribution. It is part of our creature survival mechanism. It is part of our spiritual urge that makes us all humans. We also each have a unique mixture of core spiritual energies to contribute. These are what make up our *Contributor Type*.

We now can provide significant evidence that helps each of us characterize and even quantify *Who we are* (our unique *Real Core Values Self*) and *What we are* (our physical attributes, capabilities, talents, and skills).

This information about *Who we are* and *What we are* join together to provide clear guidance about the question, *Why am I here?*

Who I am is a unique recipe of *core values* capacities that work together to cause my presence in society to be unique and to be useful.

What I am provides the skills and capabilities to express, or to deliver *who I am* to society. We include in the *What I am* composite the adapted personality or learned behavior patterns. Read more about this in our *Human Operating System™ Manual* and in my book, *Choices*.

These join together to point with significant precision toward a place in life, a work position, or role in society within which *who I am* is what is needed all day long. And *what I am*, the talents and skills that my physical makeup imbues in me are required to optimize and deliver the contribution that I can make. Maslow asserted that this inner nature prescribes where each of us fits in the world.

**The contribution I make is the expression
of my *Real Core Values Self*™ through work,
using the skills required to be successful
in a specific role.**

It is our universal or similar calling that you and I each must discover *who we are*, and we must learn *what we are*, and we must become practiced at using our capabilities and skills so who we are can become useful at the highest level possible.

We contribute the visible, measurable contributions of our work as part of a company or as a single person. But all of us, no matter what our occupation, are delivering something more important to our society than the completion of a few tasks every day. We are contributing our innate unchanging *Core Values Natures* to the people around us.

We are doing this consciously or non-consciously. In other words, our *Real Core Values Self* is not just made up of some basic values that cause us to think and participate using different strategies and tactics.

These values are themselves the real nature of our contribution.

When a human being is doing tasks that allow the free expression of the person's strongest *core values* through work, the individual becomes fully engaged in his work. He gets into the flow of things. He loses all sense of time and space, forgets to be self-conscious, or even conscious of any separation from other people.

The person fully engaged in his work becomes a pure state of being—the pure expression of one *core value* at any given moment, made tangible and useful through the contribution of the work.

This is not just a spiritual or psychological pursuit. The requirement to be useful rides along with us from our very beginning, as part of our survival mechanism. We are not comfortable; we are afraid of being left behind or left out if we are not being useful in some tangible way to our society.

We are naturally urgent about learning *who* and *what we are* so we can be useful to others, so we will be accepted, cared for, and valued by our society. When we are not working in a place of highest and best contribution, this requirement to feel useful and to be seen as a valuable contributor disturbs us at the spiritual level to take action, to change things, to get into a better place of contribution. We call this *spiritual agitation*.

This, we believe, is the prime driver behind the constantly increasing turnover that most businesses are facing in our modern society. It is the amount of *spiritual agitation* individuals are experiencing in their lives.

People who are feeling strong *spiritual agitation* are getting a clear message that the job they now have is not a right fit.

Like the adrenalin rush that comes into our body when its survival is jeopardized, the requirement to feel useful agitates our spiritual nature and serves to make us focus on the immediate situation. We feel compelled to act, to change things, to find a place where we can make our highest and best contribution. The real contribution is always a combination of *Who we are*, delivered to society through our talents and skills—*What we are*.

This is why we see more than 74% of the working population (according to Gallup) disengaged in their work and therefore in the mind set to change jobs. This is what causes a person who seems to be in every way a good person, and a reasonably functional person, to act out, to fail to perform, and to begin disrupting the workplace for others.

When the tasks I am asked to do are not aligned with, or do not deliver *who I am* to my society, then the unremitting message I get at the subconscious level, is to leave, to find a better place —

MAKE YOURSELF USEFUL.

11

The *Taylor Protocols*[™] and Our New Employment Pre-Selection Science[™]

Over the course of nineteen years of managing businesses as a hired titular CEO, I completed more than 200 successful business turn-around projects. In order to be successful in this work I had to develop many standardized tools and methodologies. This helped us be more effective and more able to handle several companies, usually eight to ten at the same time. The core of this system development work is centered on the *Core Values Index* and is, all together, called the *Taylor Protocols*.

The *CVI* assessment tool is used to develop *Top Performer Profiles* for some of the leading corporations in the U.S. Hiring is completed by matching an individual's *Core Values Nature* with the *Top Performer Profile* for a given position. This process decreases the cost of hiring, reduces turnover by aligning people with jobs that require them to work in alignment with their *core values* most of the workday. The end result is a direct positive impact on the profitability of each company that uses this system.

Later in this chapter we will describe in detail the *80/20 Protocol* and its *Top Performer Profile* process that puts everyone in the right seat on the bus. We will tell you about companies that have benefited greatly by implementing this powerful new business development tool.

We will also introduce you to the *Task Distribution Protocol*TM that allows businesses to scientifically determine which tasks are most aligned with the *core values* of individuals in a given job. After you put people in the right seat you can often double their productive output by redistributing non-aligned tasks to others or through automation.

On the individual level, the knowledge of one's own *Core Values Nature* is essential in making decisions, developing relationships, resolving conflict, and optimizing specific performance. The *Taylor Protocols* systems and methodologies presented in this book comprise a new framework within which companies and individuals can experience constant improvement.

There is no greater contributor to happiness and fulfillment than the alignment of one's *core values* to every aspect of life. There is no greater contributor of profit and continued business success than the *Taylor Protocols* which are founded on the principle of aligning the unchanging nature of people with the tasks they are asked to do in order to make the contributions inherent in the job they are hired to do.

People invest *Who they are*, their *Real Core Values Self*, through the use of skills, talents, and competencies. They invest *what they are*, their experience and skills, intelligence, and talents into the companies that employ them. Those companies that learn how to align these innate *core values* with the tasks of each person's job, gain an unbeatable competitive advantage and profitability beyond that which is generally accepted as possible.

The Taylor Protocols include:

The *Taylor Protocols* are a set of business applications offered online that use the *Core Values Index* and our pattern recognition and pattern matching algorithms to develop a *Human Capital Audit*. The *Taylor Protocols* provide restructuring prescriptions based upon alignment of individual *Core Values Nature* with the tasks in any position and fully automated *Employment Pre-Selection*TM.

80/20 Protocol™

Puts every person in the right seat, with its *Top Performer Profile™* process, causing people to make their highest and best contributions. This protocol also includes the *Human Capital Audit™* and a musical chairs repositioning process we call our *Core Values Alignment Protocol™*.

Task Distribution Protocol™

Distributes tasks to people in alignment with their unique *Core Values Nature*.

Conflict Resolution Protocol™

Helps employees and their managers understand each other better, with prescribed tools and tactics for each participant to help them shift from an unworkable position to an effective *core values*-based mode of communication.

Business Relationship Dynamic™

Compares the *core values* profiles of two individuals and provides a guided discussion to enhance communications and build effective working relationships.

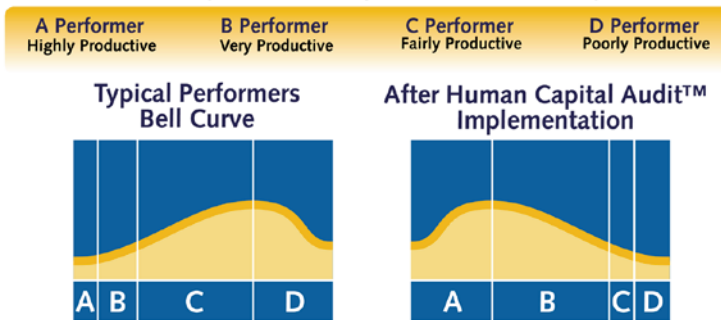
Note: These *Taylor Protocols™* are described in more detail in the *Human Operating System™ Manual* and on the *Taylor Protocols* website, www.taylorprotocols.com.

Finally, a Real Solution for the Human Performance Bell Curve

Our patent-pending algorithms scientifically find *core values* patterns in top performers in any position. The result is a *Top Performer Profile (TPP)* that is used to pre-select future *top performers* from the field of candidates for a given position.

Introducing Employment Pre-Selection Sciences™

Business Optimization using Fully Automated Pre-selection and Right Person/Right Job Restructuring



The *Human Capital Audit™* can shift the performance bell curve in any position in any company, from roughly 20% A and B performers to 80% within one year.

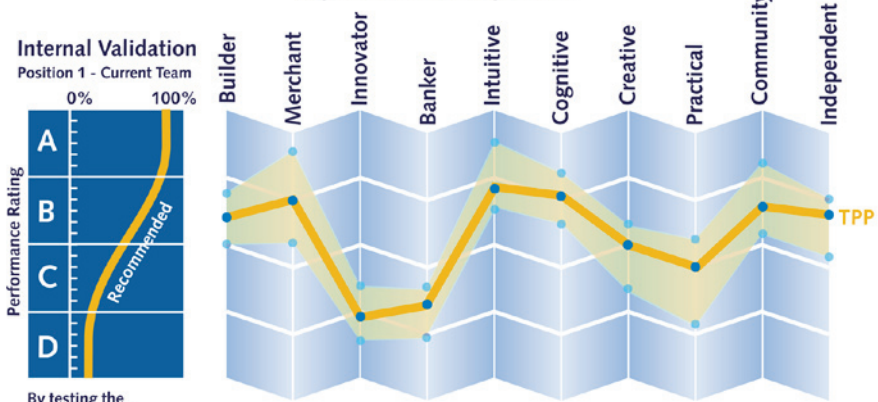
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There is no other system that offers the three essential elements to unlocking human productivity:

- 1) The *CVI* assessment that measures the innate unchanging nature of the person, providing greater than 94% repeat score reliability.
- 2) Medical grade image processing algorithms that scientifically find *core value* patterns in the individual and provide automated matching of these patterns with incoming *CVI* scores from employment candidates.
- 3) Hiring process and fee structure that move the objective screening of applicants to the front end of the employment process.

Top Performer Profile™: How It Works

Right Person / Right Job



By testing the CVI™ scores of Individuals in a given position against the TPP™, we internally validate and prove future effectiveness of pre-selection.

Pattern-matching algorithms find the TPP™, with its plus and minus variances, enabling companies to objectively pre-select future top performers and to screen out future low performers.

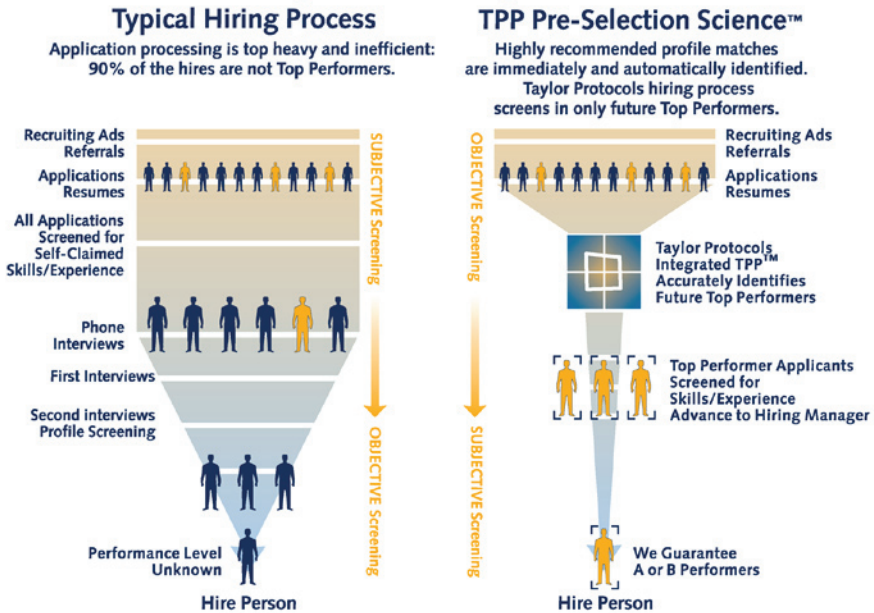
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Most companies admit, with some strong coaxing, that they have hired somewhere between 20 and 30 persons for each position in order to find one more top performer. This is true because most positions in most companies have 10% A, 15% B, 50% C, and 25% D performers. The turnover rate for A players runs at 5% annually. B performers turn over at a 10-15% rate. C players tend to turn over at the 30% level, and D performers turn over at a 70-150% rate every year.

When you put these two factors together, it is easy to see why it has taken 20 or more hires to find each one of the current *top performers* in a given position.

With our new *Employment Pre-Selection Science™ (EPSS™)*, we consistently find new A or B performers. This makes it possible to completely change the performance bell curve of any position within a year or less.

Taylor Protocols Employment Pre-Selection Sciences™ Right Person / Right Job

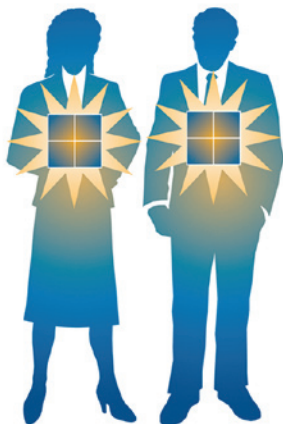


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By using our internally validated *Top Performer Profile* in the pre-selection position in every hiring process, we reduce wasted human resource interviewing and candidate processing efforts by more than 70%. This savings, added to the reduction of turnover and the increased productivity of each team, provides a greater improvement in bottom-line performance available through any other process or system.

Innate Core Values

The Unchanging Nature of a Person



Definition:

1. Existing in one from birth; inborn; native.
2. Inherent in the essential character of something.
3. Originating in or arising from the intellect or the constitution of the mind, rather than learned through experience.
4. Unchanging in nature.

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The *Core Values Index* assessment characterizes and measures the innate unchanging nature of individuals for the first time.

Once a *Top Performer Profile (TPP)* has been created for several important functional positions within a client company, the full benefits of the *80/20 Protocol* can be realized

The incoming candidates can be sent via email a *Core Values Index*[™] to take in less than ten minutes. The automated *Employment Pre-Selection*[™] will identify future top performers.

We invite you to go to our website www.taylorprotocols.com and access our free *Human Capital ROI*[™] analysis worksheet. This will allow you to quickly assess the potential contribution that the *Taylor Protocols* and our *Employment Pre-Selection Sciences*[™] can provide for you. Using your company's actual numbers, in a matter of a few minutes you will be given a clear understanding of your potential return on investment in our technology and sciences.

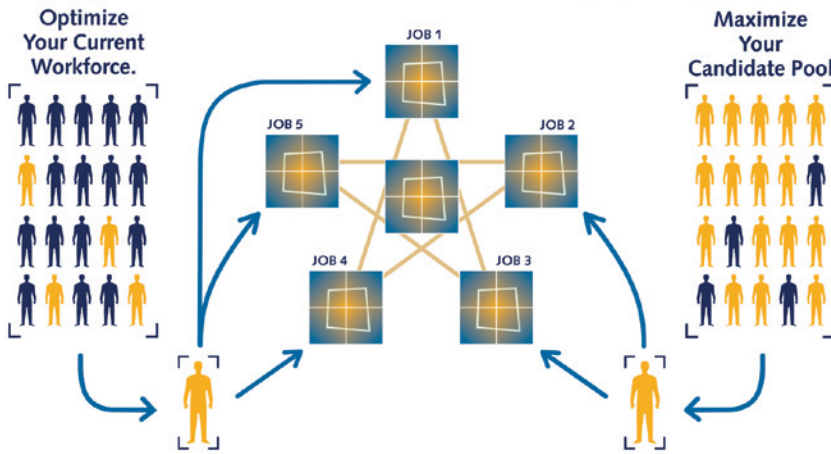
You can also learn how you can get your set of human capital assessments. Be sure to explore the *Taylor Protocols* product description information, to determine the technologies and sciences that are likely to be most beneficial to your company.

80/20 Protocol™

The *Taylor Protocols* utilize a proprietary *Core Values Assessment* tool (the *CVI*) that has demonstrated accuracy and reliability superior to the historically recognized leaders in personality and behavioral profiling systems.

Human Capital Audit Right Person / Right Job Hire

Top Performer Profile for All Positions Within the Company or Department



Test current low-producing C and D performers against other Top Performer Profiles to see if they can be positioned in a different job, perhaps in a different department, where their core value nature matches that of your company's known top performers. A currently faltering salesperson may be an outstanding customer service representative.

Test applicants that do not fit the Top Performer Profile for the first position they apply for against other Top Performer Profiles for other positions in your company. The applicant may have the core value nature to be a top performer in inventory management where they would have struggled as a collections manager.

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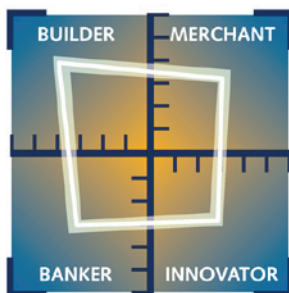
Individuals in each position who are rated as C and D performers can have their *Core Values Index* scores compared to the *TPP* in other positions, and a musical chairs restructuring will cause a significant increase in the number of employees whose *core values* are aligned with the tasks required in each position. This increases human productivity more than is generally believed to be possible.

The client now has the option to reduce the number of people in these positions or to significantly increase the productive output of the newly re-organized staff. The option to have only A and B performers in all positions is made practical and achievable.

Top Performer Profile™

Right Person / Right Job

Pre-Selection of Future Top Performers



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The *Core Values Index Assessment* provides a profile of the *core values* (core motivational drivers) of each individual. Fifteen years of field use in more than 300 companies and 50,000 persons, has provided feedback that this assessment provides a profile of the inner person, the real person, rather than just personality or behavioral characteristics.

The *Core Values Index* shows why a person operates the way he does. We have demonstrated that it is the *Core Values Nature* (inner person revealed through the *CVI*) which is acted upon by an individual's environment. We each adapt our behaviors to accommodate our environment.

This adaptation generates a personality (set of behavioral characteristics). The personality of each individual, then, is a warped or adapted version of their deepest self, the *Core Values Nature*.

Core motivational values cause a person to want to make a contribution in a certain way. This deepest internal self also prescribes the behaviors and work that serve to develop self-respect, causing people to subconsciously desire a situation that offers them the opportunity to make the highest contribution possible.

To the degree that a person's work is not aligned with their core motivational drivers, he will either: fail, disrupt the situation, force a change, or leave.

Pattern Recognition and Pattern Matching Algorithms

In the course of my career, I worked on a team that developed a computerize pattern recognition algorithm in the early 80s for an echocardiography company. The algorithm was able to detect the edges of the left ventricle through a full cardiac cycle, diastolic/systolic/diastolic or through approximately 60 interleaved video frames.

The result of the edge detection and pattern recognition algorithm in this case was used to compute non-invasive cardiac output volumes.

We developed a similar algorithm to improve the accuracy of speech recognition in the IBM compatible personal computer in the mid-80s. This algorithm increased the accuracy from 70% to better than 98%, while speeding processing time by a factor of four.

We now are applying for patents to protect the revolutionary methodology and the automated pattern recognition system that is now made accessible to hundreds of corporate clients.

Automated Employment Prescreening Science— Reliable Prediction of Future Performance

Taylor Protocols has developed a revolutionary *Employment Prescreening Science*[™] (*EPS*[™]) based upon the above-described innovative products and scientific algorithms. There are several primary functional barriers to effective prescreening that have kept other companies from using their assessments for employment prescreening. These have been solved by the *Taylor Protocols*.

1. It is not sufficient to develop an average profile of all employees who have the same title within different companies (even within the same industry).
2. It is not sufficient to develop an average profile of all top-performing employees in the same job position in the same company.

3. It is not sufficient to just develop even the highly refined *Top Performer Profile*[™] that is made possible by the *Taylor Protocols* pattern recognition algorithm.
4. It is not sufficient to overcome all of the above obstacles without also providing an automatic matching of the *Top Performer Profile* to job candidates, selecting only the best.
5. It is not sufficient to match the *Top Performer Profile* to job candidate profiles without making a judgment regarding the likely success of the individual in the job position, eliminating a significant number of unlikely candidates.

Taylor Protocols is the first and only company that offers one straightforward employment prescreening system that overcomes the above obstacles.

80/20 Protocol Top Performer Profile[™] Set-up Process

1. *Taylor Protocols* first sets up a client company home page within our website to distribute and collect *Core Value Index (CVI)* assessments.
2. Schedule a conference for Lynn Taylor to speak with all appropriate executives and managers. Lynn will go over guidelines and facilitate the establishment of criteria for A, B, C, and D performer categorizations.
3. Client hiring managers categorize all employees participating in the project for each of the positions into A, B, C, and D performance categories.
4. Put all A-D employees in each of the positions (broken out by A, B, C, and D) in an Excel spreadsheet and send to *Taylor Protocols*.

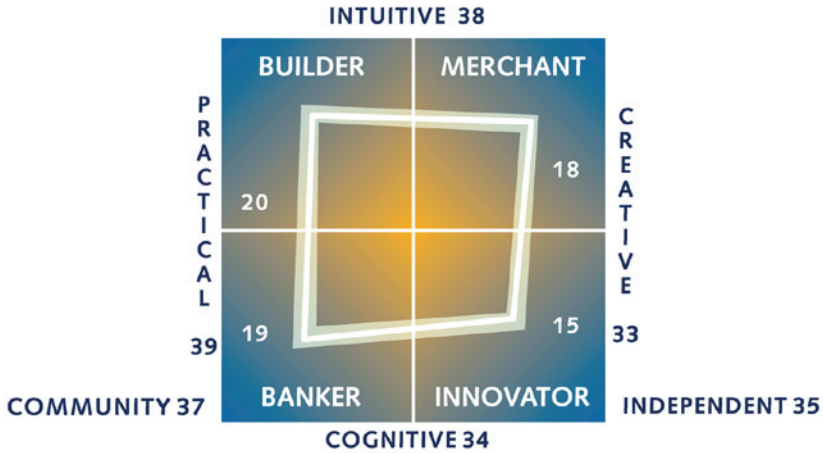
5. Client administrator sends out assessments (link in an email) to all positions that are participating in the project through the website.
6. Client collects all assessments within 3 days (first email goes out with link saying it must be completed within 24 hours, after which those who do not return the assessment receive a follow-up email to make sure they do so within the 3 days).
Note: Assessment takes less than 10 minutes to complete.
7. *Taylor Protocols* runs *Top Performer Profile* algorithms and processes and delivers a written and verbal report.
8. Schedule next meeting for Lynn to meet with executives and managers to go over results and hiring and restructuring strategies.
9. *Taylor Protocols* provides training for the use of our *Top Performer Profile* system to prescreen and hire.
10. Once a *Top Performer Profile* is completed for a given position, client receives upon request and for no additional charge, the following:
 - A. Suggested interview questions based upon *core value* issues to uncover weaknesses, strengths, emotional immaturity, neuroses, etc.
 - B. Help writing ads for each position including key words from the *CVI* for maximum attractiveness to future top performer candidates.
 - C. Learning styles report on *TPP* and for any individual.
 - D. On-going coaching, mentoring of all hiring managers as needed.

Definitions

Cognitive -	Process or faculty of knowledge and reasoning. banker plus innovator scores.
Intuitive -	Knowing as an instinct with sharp, eclectic insight. builder plus merchant scores.
Practical -	Experience, practice, or use, rather than theory or speculation. builder plus banker scores.

Sample Top Performer Profile™

The following *Top Performer Profile™* is provided for selecting likely successful candidates for the position being profiled.



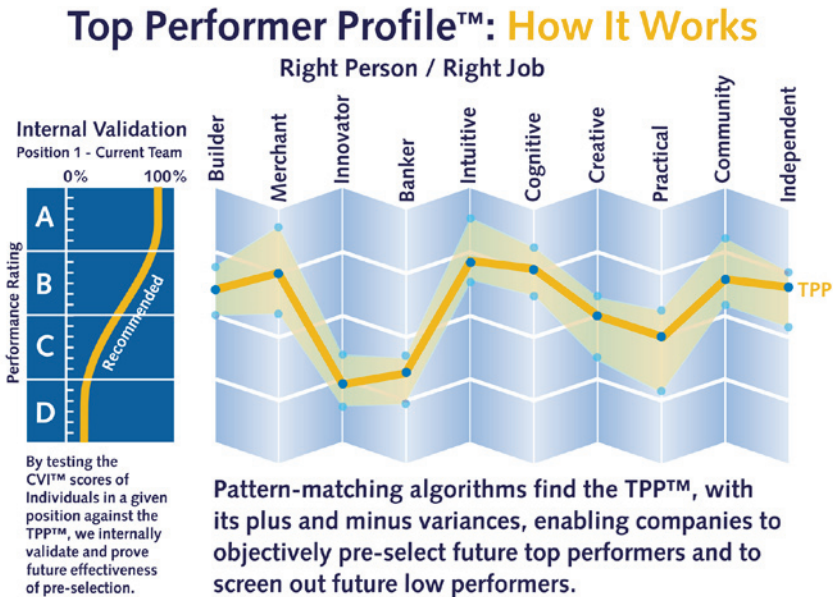
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When selecting the best employee candidates, it is important to understand that persons whose profiles are similar yet have some meaningful differences should be considered for this role. As a guide the following maximum variances from the above *Top Performer Profile™* are recommended.

	Ideal Score	Plus	Minus
Builder	20	+3	-4
Merchant	18	+2	-5
Innovator	15	+8	-3
Banker	19	+4	-2
	Ideal Score	Plus	Minus
Intuitive	38	+2	-7
Cognitive	34	+7	-2
Creative	34	+4	-3
Practical	38	+3	-4
Community	37	+6	-6
Independent	35	+6	-6

- Creative - Originality and expression, vision, imagining what can be. merchant plus innovator.
- Community - Motivated to be a contributor to a community, building relationships, working to conserve resources, and supporting appropriate and just organizations.
- Independent - Figure out what to do, then do it. Impatient with the structure and limitations of an organization.

Top Performer Profile™ Hiring Process



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Once a *Top Performer Profile (TPP)* is created for a given position, *Taylor Protocols* will install the *TPP* in Client's home site within the *Taylor Protocols* Internet site. Then the hiring process begins.

1. Client works with *Taylor Protocols* to develop advertising for employee candidates for each *TPP* job position.
2. Client receives resumes and sends out an automatic request for each candidate to complete a *Core Values Index (CVI)* assessment. This is done by Client simply typing in the email address of each candidate and clicking on the submit button in the Client's home site within the *Taylor Protocols* website.
3. Client receives candidate *CVI* scores automatically and asks for automated comparison of each candidate score with the right *Top Performer Profile*.

4. Client receives a High Recommendation (HR), Low Recommendation (LR), or No Recommendation (NR) for each candidate.
5. *Taylor Protocols* recommends that Client only interview people whose *CVI* scores meet the *TPP* High Recommendation requirements.
6. Client uses the *Taylor Protocols* suggested interview questions to decide which of three or four High Recommended candidates to hire.
7. Client gives *Taylor Protocols* permission to use the existing employee pool that was used for the *TPP* process for each position as an auditing base for all future hires. Client informs *Taylor Protocols* of each hire made using the *TPP* process and pays a per-hire fee on the first of each month. All new hires are fully guaranteed for 60 days. An unlimited number of *CVI* assessments are allowed for prescreening candidates for each *TPP* job position. Every 90 days, client sends a fully updated roster of employees in each position, noting all new hires, any failed and guaranteed hires, etc.
8. Client hires candidate and tracks performance for future refinement of the *Top Performer Profile*. Once completed, *Taylor Protocols* offers annual reprocessing of A, B, C, and D employees in each position in order track the evolution of each position, always improving the hiring process.

Top Performer Profile™ Pricing Structure

The **initial project**, consisting of one or more *Top Performer Profiles*, is given a fixed-price bid based upon the number of *TPP* positions, Client company size, and hiring frequency. All of the steps described in the *TPP* process description are included in this fixed fee.

The **hiring process** is supported free of charge by *Taylor Protocols*, including help with advertising content and suggested interview questions, and unlimited use of the *CVI* for all prescreening processes—plus such reports as: Learning Styles, Motivation Styles, and all other *TPP*-related information.

The **Per-Hire Fee** of each new employee's annual compensation is paid on the first of the month following the month of initial hire. Each new employee's success is guaranteed for 60 days. Once initiated, client agrees to use the *CVI* to prescreen and process all new hires for each *TPP* job position. Client further agrees to provide sufficient reporting and auditable employee tracking that will allow *Taylor Protocols* to accurately assess the per-hire fees. Annual licensing fee of for system begins after the first year of service (first year waived).

Core Values Business Optimization

The *Taylor Protocols* consistently generate quick and substantial productivity improvements. This process is described below, followed by a summary of the benefits it produces.

Step One

The first step is the production of an *Top Performer Profiles* for each key position in a company, such as sales rep, customer service rep, underwriter, or stockbroker. For each of these key positions, all incumbents complete a *Core Values Index* and the client company's management identifies the top 20% (approximately) of the performers in each position. Using our patent-pending pattern recognition and matching algorithms, an *Ideal Profile* is developed which captures the *CVI* characteristics that the high performers in each position have in common, and that distinguish them

from the lower-ranked performers. This process creates an internally validated assessment tool that is accurate, reliable, and repeatable, with no possibility of discrimination or deception.

Step Two

Using the value words most attractive to people with the newly created *Top Performer Profiles*, the company then recruits individuals with the requisite work experience and skills. More of the appropriate, close-fit people respond to the ads and more of the poor-fit people are repelled by the language in the ads. Each person with strong experience and skills is sent a *Core Values Index* Identification Number via email from the company. These candidates complete the *CVI* over the Internet within 7-10 minutes. They and the client receive the resulting *Core Values Profiles* instantly by email boxes.

Step Three

The hiring manager compares each individual candidate *Core Values Index* with the *TPP* and sets appointments with the Ideal candidates (best resume and matching profile). Using the Suggested Interview Questions provided with each candidate's profile, the candidates are then further screened relative to emotional, adapted personality, and interpersonal development levels.

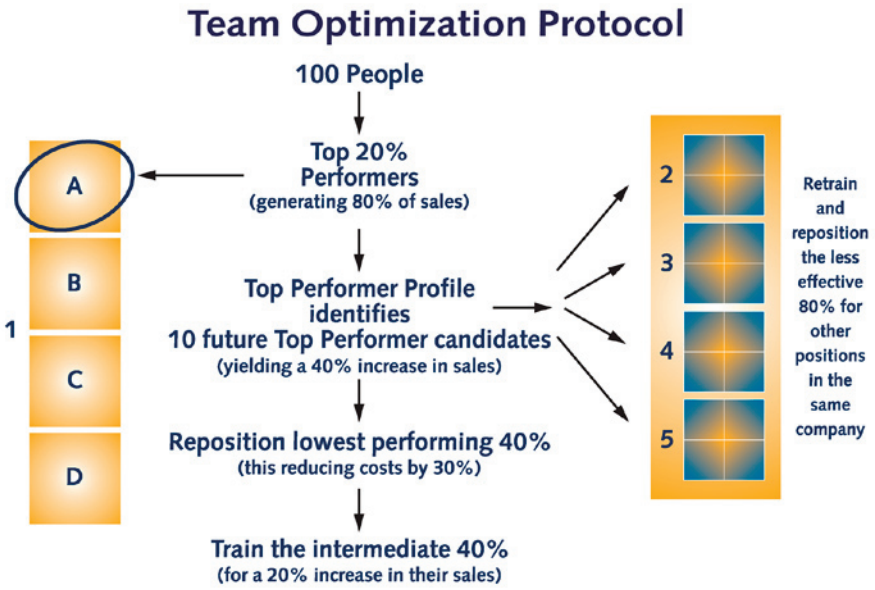
Step Four

The candidates are trained along with other employees in accordance with their Learning Styles, which are discovered and clearly defined by their *Core Values Index*. Management is trained to motivate, commission, position, and manage these people in ways that honor their *core values* and that further optimize their performance. All support personnel, soft and hard systems, and all processes are tuned to optimize the productivity of this highly tuned (values tuned) group of people.

Results and Benefits

Wilfredo Pareto, the Italian macro-economist, discovered and introduced the 80/20 principle that has since become accepted by business managers across almost all industries, functions, and geographic locations. This principle asserts that the vast majority (up to 80%) of the value added by each business function is created by a minority (20% or fewer) of top performers.

Taylor Protocols has gathered information that supports the validity of this principle. More importantly, it has developed a system, the *80/20 Protocol* that allows organizations to consistently attract and retain a larger percentage of such top performers, leading to dramatic improvements in productivity. This process works by significantly improving the percentage of people who are positioned in jobs that align with their *Core Values Natures*. The following example illustrates how the *80/20 Protocol* can be applied in a sales organization:



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Example:

Company has 100 sales people with top 20 generating 80% of sales.

1. Recruit 10 new people with *CVI* similar to the *Top Performer Profile* of top performers. This yields a 40% increase in total sales.
2. Reposition lowest performing 40 sales people who also have the greatest difference from the *Top Performer Profile*, thus reducing costs by 30% (net of the cost of adding 10 new people).
3. Train the intermediate 40 people for a 20% increase in their sales.

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The Learning Styles

An individual's *Core Values Index* not only provides insight into an individual's contributions, impositions, and self-respect builders, but the profile also indicates the most efficient way for them to learn. The learning style of an individual is directly related to his *Core Values Nature*. When lessons are provided in a manner harmonious with a person's *core values* learning is easy, fun, and long lasting. When lessons are given in a manner that is contrary to learning style, the work of learning is arduous, boring, and irritating; it takes far too much energy and disappears as soon as the lesson is ended.

We remember everything that supports our *core values*. We easily forget anything that does not support our *core values*. The reason is simple. We are all geared to approach life in a specific and consistent manner, based upon our unique recipe of *core values*. We all have these same values, but in different degrees. Our life strategy is based upon these *core values*, and we intuitively know that we develop self-respect when we work within this value structure, and that we are most likely to succeed in making our contribution when we are functioning in harmony with our *core values*.

When we are involved in learning things that support and relate directly to fulfillment of our *core values*, we are filled with enthusiasm, energy, and motivation. When these lessons serve our desire to make important contributions to the world, our self-respect is increased, our confidence is improved, and we perform at our highest levels of productivity, creativity, and effectiveness. Our desire and ability to learn is inherently increased when the lessons themselves come to us closely aligned with our *core values*.

The Learning Styles Combinations

Each individual has his own style of learning based upon a unique recipe of his *Core Values Nature*. No one has ever been found to have zero value in any of the *core values*, nor has anyone been found to have 100% preference for the values in any *core values* set. We all, therefore, have a mixture of these values, and an ability to learn at some level from the value sets that are not our dominant or secondary value sets.

Most people operate reasonably well from the learning strategies inherent in their dominant and secondary value sets. Some operate and learn well from three of the value sets and a few operate comfortably from all four learning strategies. There is also a small percentage of people who are comfortable and capable in only one of their learning styles.

General Rules for Curriculum Development

Before developing a curriculum for a given group of people, each person should be asked to complete the *Core Values Index* at www.taylorprotocols.com. All scores should be grouped together to obtain a group average. Each individual's score should be compared to the group average. If one person's scores differ significantly from the group, their curriculum should be developed separately.

Total possible score in each value set is 36.

Total Learning Styles score is 72.

Learning Styles

- | | |
|----------------------|------------------|
| 1. Decide and Do | <i>Builder</i> |
| 2. Talk and Listen | <i>Merchant</i> |
| 3. Observe and Solve | <i>Innovator</i> |
| 4. Read and Analyze | <i>Banker</i> |

Rule One

People who score more than 20 in any value set will be able and

willing to learn using the strategies inherent in that value set, although they will usually have greater preference for the learning strategies in their dominant and secondary quadrants.

Rule Two

People who score less than 20 in all value sets will learn effectively from all curriculum approaches, although they generally will exhibit personal preferences based upon dominant and secondary scoring levels.

Rule Three

People who score more than 25 in any value set will work and learn almost exclusively from that learning (*core value*) style, except in the rare case where scores are greater than 25 in two quadrants. They may have a preference in their dominant learning style and will certainly show little interest or ability in their third and fourth level value sets.

Rule Four

People who score less than 10 in any value set will be very reluctant and often unable or unwilling to learn from curriculum based upon that value set.

Rule Five

In rare cases a person may score less than 10 in two quadrants and therefore the scores will be greater than 25 in two quadrants. In these special cases (less than 1% of the population assessed), the following important provisions must be made.

- A. All teaching must be from the two dominant quadrants.
- B. Build curriculum with awareness of the following general traits of combined Personal Values Learning Styles:

Dominant and Secondary Learning Styles Fundamental Nature

The Learning Styles Fundamental Nature of the *Builder Merchant (Merchant Builder)* is Intuitive.

The Learning Styles Fundamental Nature of the
Innovator Banker (Banker Innovator) is Cognitive.

The Learning Styles Fundamental Nature of the
Builder Banker (Banker Builder) is Practical.

The Learning Styles Fundamental Nature of the
Merchant Innovator (Innovator Merchant) is Creative.

The Learning Styles Fundamental Nature of the
Builder Innovator (Innovator Builder) is Independent.

The Learning Styles Fundamental Nature of the
Merchant Banker (Banker Merchant) is Community.

In all coaching, mentoring, and management situations it is important to accommodate the individual's *core values* learning style. It is equally important to subjugate one's own learning and leadership style to the individual's learning style. It is the responsibility of the Coach, Mentor, and Manager to make all communication effective and to serve the employee or client in his effort to optimize personal performance. This can only happen when the coached person is provided learning experiences in alignment with his *core values*. By utilizing the person's *Core Values Index* and *core values* learning style assessment scores, a manager can quickly temper his approach to the individual so communication and learning are optimized.

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How Can I Change Who I am?

What we really mean when we ask this question is: How can I change my behavior? Or, how can I increase my success? How can I keep my foot out of my mouth? Or, where do I find the courage to take more risks to be more outgoing?

We all want to be our best self, to accomplish our dreams, to feel that our lives have meaning. But the ways we have learned to react to different situations and to different people often spoil our sense of a good self.

So the secret is to give up the idea of changing yourself and take possession of your life. Claim the powerful, loving, creative and knowledgeable elements of your life and build on them. Instead of trying to change who you are habitually being, the challenge is to find your way back to being *who you really are*.

Each *core value* without fear has a wonderful capable strategy for developing fulfillment and success in life. The idea is to reclaim your life from the edicts of parents, teachers, and early social influences to see yourself as the *knowledge-wisdom* in the room, or other *core value* that you are and to develop all of the positive aspects of your *Core Values Strategies*, minimizing your negative reactions.

Scenario

A young sales representative came to my office, frustrated with himself, with his company, and with his boss, who he felt was competing with him.

This young man was a strong Merchant-Builder who had spent his early career as an engineer and was now, at 33, learning the skills of selling, judging himself harshly, and looking for reasons for his self-imposed sense of failure.

I did not judge him to be a failure. I was pleased with his progress after a few months of work with him and I told him so.

As Tom began his discourse on all of the reasons why he would not be able to succeed in the company where he was now working, I asked if we could start instead by talking about his core values and whether he was helping or hurting himself. “Okay?”

While I was describing the strengths and weaknesses of a Merchant-Builder, I caught Tom smiling self-consciously, then laughing audibly. “That sounds like me, all right.

“I start out talking with customers, build a great rapport, and at some point I get real uncomfortable that I’m wasting their time. So I shift instantly from being a Merchant to being a Builder and get down to business. Sometimes I can almost see them shrivel back away from me and the meeting ends with a cold feeling.”

As we talked we learned that Tom’s parents had both been harsh judges of him, getting impatient with him whenever he was too excited or when he wasn’t talking about things they felt were important.

That influence guided him toward engineering instead of sales. That influence still whispers in his ears today when he has “taken enough of a customer’s time chatting, and it’s time to get down to business.”

What I explained to Tom toward the end of this conversation applies to us all —

**In everyday life, whatever decision we make,
whatever action we take, because of fear, is wrong.**

A confident, happy, robust person, regardless of his *core values*, puts to work all of his positive *core values* traits intuitively, using skills and responses which have proven in the past to gain favor, win friends, and influence enemies. Most of the time we as developing people act from this intuitive place.

But when we experience ourselves being overpowered by someone, or unloved, or unappreciated, or judged as being wrong we feel fearful. We get a tight knot in our stomachs. A voice in our head tells us to take defensive action and we react, shifting out of our positive self and into the negative conflict strategies of our *core values*, our learned personality behaviors.

Some of us shift from one negative *Core Values Strategy* to the next in order to escalate the conflict to a higher level and bring in the bigger guns of a different *Core Values Strategy*. When we move from positive to negative or when we move from one *Core Values Strategy* to another because of fear, we lose our effectiveness.

We are no longer in control of ourselves or the situation. We can no longer take positive action since we are focused on deflecting the energy of someone else. We are on the defense.

Tom had found himself doing this very thing in a business meeting that same morning. He had been talking to his sales manager and to the company controller, trying to understand as a group what had happened to a customer's invoice—how it had gotten screwed up.

"I did all right," Tom said, "until they both started ganging up on me, and I knew they were wrong. Then Suzy made me crazy by complaining that I hadn't given her the right information, and I lost it."

While telling me this story, Tom pointed his finger at a befuddled imaginative Suzy and told her off in no uncertain terms. Then he raised his hand in front of his face to show how his manager had backed him off and required him to settle down. He had left the meeting in a huff, with the issue unresolved, but having, in his own mind, won the argument, proven them both wrong and ready for the next assault.

I told Tom it sounded to me like he started the meeting as a compromising, listening *merchant* and ended the meeting like a blustering *builder*. He was willing to remain a *merchant*, caring and responsive, until he felt unappreciated, overwhelmed, and then made to feel wrong.

At that point he feared being seen as incompetent, was afraid a being judged foolish, so he shifted to his *builder* mode to take charge and force his point. He laid the blame powerfully in Suzy's lap and raised up his voice and his frame to make the impact felt.

It was the fear, I told him, that flipped the switch. "And when fear flips the switch the *core value* called in for reinforcement is being called into battle with all negative strategies armed and ready. The same would be true if, after leaving that meeting, you had felt fearful of losing your job because of your anger and ineffectiveness at handling a small conflict.

"Your *merchant* would have been called back in to fix the relationships, and you may have found yourself trying to manipulate Suzy and your boss back into liking you. They might have experienced you as being a little unctuous, a little too friendly, and not trustworthy, especially considering your recent performance."

The trick is to be conscious of these switches, which occur in all of us. One kind of incident will flip the fear switch sending a *builder* in to rescue an individual's foundering *merchant*. Another kind may send my personal *innovator* in to interrogate some perceived enemy for my *banker* side who is feeling judged. Regardless of the situation, when fear compels the action, the action comes out negatively.

As we become conscious of these switches which exist in each of us as a unique menu of responses, we can decide whether to respond out of fear or to remain engaged. We may still decide our best bet is to switch from one *core value* strategy to another, but when we do so, it will be with the positive attributes of that *core value* fully engaged. We will find ourselves acting more effectively, creating more relationship and business success because of this consciousness.

A strong *builder* in Tom's situation above, could have been invited forward by Tom's *merchant* as an assertive ally. This confident, unafraid *builder* might have repeated two or three times in an even voice, "Excuse me—Suzy, Suzy, excuse me. That's not how this happened. I gave you a memo yesterday—I can get it if you need me to—that clearly told you how this was to be billed, and how to communicate the decision to our customer.

I will call the customer and straighten things out, but I need you to be more careful to follow that kind of instruction in the future.”

Suzy would not have particularly liked this response. In a way, although there would have been much less anger and hostility aroused in Tom, this powerful *builder* response does not give Suzy any excuse to act out, to continue to argue, or to cut things off because Tom was being abusive.

Tom would have left the meeting the clear-minded sales person who had done his job, with Suzy still needing to correct the situation and explain her own incompetence.

Tom's actual response had gotten Suzy off the hook, spoiled a few hours of happy selling, and put one more black mark in his boss's mental notebook.

We are effective when we act without fear using the positive traits of the *core value* we decide to employ at the moment.

As you become more skilled at recognizing the emotional and psychological switches that send you into the negative attributes of your primary or secondary *core values*, you will also gain a growing awareness of which *core values* are most effective in dealing with which situation and which kind of person.

You can become increasingly confident in the positive skills of all four *core values*, moving seamlessly from one to the other, always maintaining your sense of self-control and personal power.

Watch and Learn

It is important as you begin this process to simply watch yourself responding to other people, in different challenging situations. Don't even attempt to correct your own action at this point. Just watch yourself going through your motions and notice how effective or ineffective you are being. And don't judge yourself harshly.

After all, you were warped into this kind of stimulus response behavior over millions of years of evolution and a few decades of parental and social influence.

You have been doing the best you could. Now you're deciding to simply take a look at the relative effectiveness of your *core value* choices and decide whether there might be a better way to act. The most important thing is to simply observe yourself in action.

Tell yourself the truth about your own feelings. Know that all negative feelings are the result of fear. Ask yourself what you are afraid of that is making you react the way you are. Listen to your answer.

Do this for several weeks, just watching and asking yourself to see the truth. At some point in the near future you will begin to understand the most devastating emotional switches to which you occasionally respond, and you will be given the opportunity to think about a better strategy.

When this begins to happen for you, come back to this book and read through the *core value* approaches. Ask yourself which *Core Values Strategy* would be better at handling a given situation and commit yourself to move into that *Core Values Strategy* the next time the fear comes up.

Commit to act with all of the positive energy and resourcefulness of that chosen *core value*. Commit yourself to watch, listen, and learn whether this style works better for you in the observed situation. You will be amazed how dramatically this kind of conscious decision can change the outcome of challenging situations.

14

How Can They Possibly Think Like That?

The social effects of our Core Values and Catalytic Values

Have you ever left a meeting with a herd of engineers, or a flock of marketing and sales people, saying to yourself, “How can they possibly think like that?” Or, after having a fight with your boss, made the statement to the next person you met, “I just don’t get where she’s coming from.” All of us at times look at people around us, amazed at their thoughts, decisions, and actions. We cannot imagine how they can possibly see the world from their presumed perspective or justify their judgments and attitudes.

Knowing that people tend to act in manners consistent with the four *Core Values Strategies* is the first step to understanding more about why people do the things they do, and, more importantly, why you do the things you do. Being aware of each *core value’s* contributions and impositions to the team is essential to optimizing personal and business success.

The next step in furthering this success is the understanding that there are innate forces or drivers within each of us that influence every decision, judgment, and action that we make. These motivators are called *core values*. Each *core value* possesses a specific *Core Values Strategy* that directly influences their contributions and impositions to the team.

A person’s *core values* are supported by *Catalytic Values*. A *Catalytic Value* provides the foundation for release, or investment of each *core value*.

The *Catalytic Value* is like the cornerstone of a building, all other stones of thought, action, and attitude are aligned with it and built upon it. It is like the self-respect of the *core value*; without the *Catalytic Value* firmly in place and feeling healthy, the *core value* isn't able to provide strengths and contributions.

In the absence of the *Catalytic Value*, the *core value* is not being nurtured and a person falls into a negative cycle. Each *core value*, in the absence of the *Catalytic Value*, has a correlating negative cycle. A negative cycle consists of the impositions, negative behaviors, and poor attitudes that a person exhibits when their self-respect is low due to a lack of nurturing of their dominant *Catalytic Values* and *core values*.

In the presence of a strong trust in one *Catalytic Value*, the corresponding *core value* is nurtured and a person gains entrance to a positive cycle. Each *core value*, in the presence of the *Catalytic Value*, has a correlating positive cycle. A positive cycle consists of the contributions, positive behaviors, and exemplary attitudes that a person exhibits when they have high self-respect due to the nurturing of their strongest *Catalytic Values* and *core values*.

By understanding a person's *core values* and *Catalytic Values*, we can finally surmise an answer to the mind-boggling question, "How can they possibly think like that?" Not only do a person's *core values* and *Catalytic Values* indicate their natural contributions and impositions to a team, but they also indicate how they build their self-respect.

Understanding that people possess innate and natural contributions clarifies how to make them feel valued and useful in their work. By aligning a person's work with their *core value* and supporting that *core value* with their *Catalytic Value*, we can optimize their performance and build their self-respect.

The single most important key to successful relationships and to resolving conflicts is:

Honor the *Core Values* of the person you are with.

Building a Business with Four Corners

Every business requires all four *core values* cornerstones to be in place in order to assure success. When any one primary *core value* is allowed to control, the strength of that *core value* becomes the weakness that brings the house down.

As a business grows, the value that is needed most during each phase is very different. At first it may be essential to value *love*, building relationships, attracting customers, serving them with unfailing attention. As more customers are attracted, the attributes of work and *power* become more required in order to meet commitments.

Soon the complexities of the business created by its success begin to overwhelm all of the players, and the need for *wisdom*, problem-solving, new systems, and better plans begins to take precedence.

Conservation, better *knowledge* of the competition, superior technical skills, better handling of financial concerns—these elements of *knowledge* become the most essential cornerstone—until the risk aversion of the *bankers* begins to stall the company and flatten its growth, once again elevating the *merchant's* commitment to opportunity and relationships to the highest plain.

15

Even Companies Have an Optimum *Core Values Profile*TM

As we have discussed briefly in chapters thirteen and fourteen, companies and departments within companies also have their own unique *core values*. Companies in early development will be built around the personality of the business owner.

In the early stages this is highly appropriate since business owners tend to select business areas for which they have an affinity and their *core values* are usually suited for their work. Since most of us naturally choose people we like, the growing company continues to be balanced around the personality of the owner.

As the company succeeds, however, the demands for administration, customer service, production, production management, quality control, accounting, and finance, etc. begin to demand greater and greater energy. The company must evolve with these demands, inviting into the spectrum of current employees, people who do not necessarily fit comfortably with the personality of the founder.

This evolution is always disruptive and sometimes painful. Wrong choices are often made, requiring growth of staff through a process of trial and error and error and error. Application of the *Core Values Index* and our *Human Capital Audit*TM (*HCA*TM) in these instances can greatly reduce the ineffectiveness of such a growth process.

Another common situation is a department or company which has been in existence for some time without change of personnel, often without any re-alignment of people and jobs. The reality is that the world and its markets continue to change. If a company or department has been static in its application of people resources for more than two years, you can bet the efficiency and appropriateness of job assignments is significantly misaligned.

Again, by evaluating the optimum *core values* which are now required by a company or department and comparing that optimum profile with the actual *CVI* scores of all players, we can rapidly determine who, where, and in which positions changes are required.

Often a simple shuffle of job assignments, an exchange of tasks among the players, can create a tremendous increase of energy and improve results. Sometimes there is a need to bring in new energy or eliminate people who are committed to resisting required change. The *Core Values Index* makes the need for these sometimes painful decisions clearer and less personal.

16

Building Effective Teams

There are three important avenues of information which need to be tracked in parallel as we attempt to build effective business teams.

First, we must fully understand the purpose and the primary function of the team, its contribution to the overall company objectives. This analysis must be thorough enough that each activity required of the team can be broken into individual tasks with time estimates established.

Second, we must understand the constraints of budget. Part of this avenue of analysis involves a comparison and prioritization of the subject team's relative importance when compared with other teams and its consumption of resources compared with its contribution to the whole. Given that rational conclusions have been drawn in this second process, we return to the first avenue of thought and re-prioritize the functions and tasks of the subject team in order to see which might be delayed, reduced in scope, or eliminated.

Third, we must assess the existing team members, evaluating their effectiveness, efficiency, and consistency in the performance of each essential task. When compared against the *Core Values Nature* of all the members, we will often discover that the first order of business is to shift tasks around among the existing members, or if we have a large company, to trade team members with other departments.

Since it takes a great deal more time and energy to perform tasks for which we are not qualified, or not predisposed to enjoy or perform well, this realignment very often eliminates the need to increase staff size. Often

we find that we will accomplish far more by eliminating team members than we would by enlarging the group.

Scenario

A good example of this reality occurred with a commodity products distributor. The company's sales had dropped off by 30% over the previous six months, and the company president was stressed and under personal tax pressure. He was constantly trying to retrain new sales people. He was running back and forth between territories like a juggler with plates spinning on a stick. He had as many plates in the air as his energy would allow and still he was failing.

The company's sales staff was making a sub-industry income and their turnover rate was nearly 60% per quarter. This is not a formula for success.

The president and his sales manager, who was also not in a territory, were both intuitive contributors as were the two best performing sales people. We cut the staff in half, doubling the size of each person's territory, keeping only intuitive contributors.

Next we shifted our method of selling to the smaller customers from a route sales approach to an inventory stocking program with telephone sales stretching the need for sites visits from once per week to once every six weeks. We applied the excess energy to pursuit of the next larger-sized accounts.

Within three months we were setting new sales records, doubling the business in just six months. The sales people were making more than 50% above industry averages. Turnover went to 0% over the next two years and the average order size doubled.

We now had the right people doing the right jobs and doing them the right way. When we hired our next sales person to support new product lines, we hired an intuitive contributor who wanted to make better than the industry average compensation and was willing to work our system to do it.

Another example is a telecommunications company that had a technical support group answering phones. They also had a customer service group, a dispatch group controlling the technical staff resources, account managers who felt responsibility for customer satisfaction and obtaining add-on sales, plus field sales reps who would also receive calls from urgent customers and

a management staff—all with equal commitments to customer satisfaction. Everyone felt overworked. Everyone was receiving customer complaint calls. Everyone was making promises to fix customer situations.

The solution we were hired to install was the addition of appropriate new personnel who could finally make customers happy—make everyone more effective by reducing the workload.

Scenario

The actual solution we installed was a 30% reduction in staff size, reducing the size but increasing the authority of the customer service group, which initially had no authority to dispatch or make financial accommodations. We also eliminated 80% of the project management group which was mostly being used to clean up the messes caused by poor work orders and poor technician training.

This reduction plus a few systems and procedures, which defined who was able to do what and who was responsible for what when—caused an increase of company profit from a 3% loss to a 9% pretax gain, with an increase of customer satisfaction beyond anyone's expectations. We went from 60 complaint calls per day to 3 per month in less than ninety days.

... all based upon realignment of people according to the Core Values Index and the processes described in this handbook.

17

Achieving Company Balance

Every position, every function, in every company has a requirement for a unique and “optimum” *Core Values Nature*. Each department in each unique company has an optimum balance of *core values* that they need their leaders and workers to possess. For instance, a sales department made up of strong *merchant* types will be great at stirring up a lot of business, but poor at closing. They will also likely be lousy at collecting marketing and sales data, and not good at assimilating new projects and developing new sales approaches.

An effective sales department needs employees with strong *builder* values to close deals. It needs people with *banker* values to track, report, and control expenses. Finally, *innovator* energy is needed in just about everyone in a sales department to develop new sales promotions and competitive strategies, and to handle the demands of a variety of customers.

It is amazing how simple bringing balance into a company or a department can be once all of the players are indexed according to their *core values*. The related strategies, weaknesses, and imbalances are quickly identified and can be improved upon.

Good luck. Remember 95% of your continuing education time should be spent working on improving and managing your own *Core Values Nature* and your unique leadership style. Trust others to make their own progress once their *Core Values Nature* has been revealed by their *CVI* scores and understood.

It is also important to remember that you can't change other people, but you can learn to be more effective in your relationships with them. You can cause them to change how they relate to you by becoming more conscious of which *Core Values Strategy* you choose to use when you are with them.

You can learn to dispatch people toward important company objectives by predicting the likelihood of their success in the roles assigned to them based upon their *Core Values Nature*.

We have developed a unique *Conflict Resolution Protocol™* (CRP™) that walks you through a step-by-step procedure, so you can see what *Core Value Strategy* you are likely using when dealing with a specific individual in a specific situation. Then you are shown the same thing about the other person.

With a little guidance, you are shown how to shift from your current strategy with this difficult person, to one of your strongest *Core Values Strategies*. You will be amazed. When you approach a difficult relationship with an entirely new strategy, the other person has almost no choice—they must respond differently. The power of this in business management is extraordinary.

18

Development of Personnel as a Means to Corporate Success

If every business problem is a people problem, as has been proposed, then the only effective path to business success is the development of people. This can be done in two ways.

First, attract and hire good quality people. Put every person in the right seat, doing the right work. This sounds easy and sounds like an end in itself, but I have found that hiring one good person is a significant challenge.

Hiring two good people who have the necessary skills and who work well together is another challenge altogether, something like winning the lottery every time it occurs.

**Every business
problem is a
people problem**

This is why we developed the *Taylor Protocols* and our new *Employment Pre-Selection Science™ (EPSS™)*.

One of my clients continuously recites quotations from business gurus who recommend such things as:

“If they can’t do the job, find someone who can.”

“Turn your people over at least once a year. It’s good for business.”

The reality is, that managers who tend to function under these kinds of assumptions are themselves generally ineffective.

This is not to say that clear business objectives do not need to be set and met and that some employees are simply not productive or are not good team members. Some are disruptive or choose to be blocks to necessary changes. We have found that less than 15% of the employees in most companies are truly poor workers. Most are simply in the wrong job.

We have had great success moving people across the hall, out of a position in which they are poor performers and into a position in which their *Core Values Nature* is very similar to the top performers in that position. Most become A or B performers very rapidly.

It is important to realize that we spend a significant amount of time and money building and nurturing good customer relations, good banking relations, and good vendor relations. It seems appropriate to invest an equal if not greater energy and resource allocation toward the development of the individuals in our business organization.

This, after all, is the way we increase our capacity to build all of the other necessary relations with the economic world outside our offices.

I have known numerous business leaders who have attempted to become better business people by getting more business education. And to some degree this has been helpful. But how many of us today realize that an MBA is an MBA, a piece of paper that affirms a certain level of classical *knowledge* in several subjects, but it does not certify *power*, *wisdom*, or *love*, or the thirst for being the *knowledge* in the room. Nor does it equate with innate capability, management acumen and team building abilities, or anything else directly related to running a successful business.

An MBA illustrates best that a person has the basic intelligence to learn from books and lectures.

And history has taught us, or should have by now, that hiring people based upon previous experience and self-attested skills, even proven or tested skills, still results in the performance bell curve we have illustrated in this handbook, 10% A, 15% B, 50% C and 25% D performers in almost every position in every company.

When I want an employee to perform a certain task, I am most concerned about whether he or she has the innate characteristics which are most suited toward the job I want to get done. My second concern is: "To what degree has this been demonstrated by successful experiences?"

I have hired many people who had the right experience and a good resume but when hired demonstrated to me that their capabilities were misaligned to the job. The sales person I hired really should have been an accountant. The manager I hired should never have been taken off the production line.

The only path I know toward consistent success in business is to find people who are "meant for the job" and who have the innate capacity to be the kind of energy the job requires, who are wired by nature to need to make the kind of contribution the job requires in the manner that other A performers have demonstrated to be the most successful. That's a formula for success.

We have found that God does not play games with us. If we are wired in our innate nature to be compelled to make a certain kind of contribution, we are given the respective capabilities to make that contribution. From this base we can build any business.

It is not possible to start with people whose personalities and capabilities are mismatched to the job (no matter what experiences appear on their resume) and teach them skills and end up with more than a barely acceptable situation. Generally we end up with a great deal of conflict, job malfunction, errors, team unrest, and business failure.

So smart business owners and managers will use a profiling test like the *Core Values Index* in order to understand the right person for the position. This information added to an assessment of basic skills and experience, increases dramatically the likelihood of hiring a good fit for the job.

19

Control, Caretaking, and Other Terrible Habits

One of the factors which drove the development of the *Core Values Index* was a proliferation of personality tests which classify people as being controlling people, or caretakers (people pleasers), assigning these characteristics as primary traits.

While these modes of behavior seem to be more apparent in people with certain kinds of *core values*, I became aware through my own self-discovery that I and every person I know are involved in the battle for control, and at certain times and in a variety of ways, one of the means of control which each of us may choose is caretaking, or people pleasing.

The reason each of us has chosen to be the way we are is related, as discussed earlier, to our innate pre-disposition and to the parenting we received (or did not receive). Some of us learned to do open battle and to move aggressively for control of situations. Others of us learned that such an approach led to failure because someone else had more *power* to begin with or was more skilled in battle.

For these persons, another more subtle but equally effective means to gain control was found through taking care of the needs of others. This strategy builds a certain level of obligation on the part of those around the caretaker. It also builds a dependency and an illusion of control which creates a lessening of aggression from more overtly controlling people.

We are all involved in the struggle for control. Some of us use caretaking as a means to obtain more control. I have found in my work as a change agent in companies, that the caretakers cause just as many problems, if not more, than the overtly controlling people, whether they be *builders*, *merchants*, *innovators*, or *bankers*.

Caretaking people tend to be passive-aggressive personalities, unwilling to take an open stand but willing, like everyone else, to continue to pursue the things they want. This indirect strategy, especially since it comes toward the recipient in the guise of a wolf in sheep's clothing, is confusing, manipulative, and difficult to read. People who work with caretaking people don't feel a lot of pressure to perform job tasks, but they do feel pressure to behave in certain ways, to speak in certain tones of voice, and to fit in.

Also, since caretaking people do not create clean boundaries in interpersonal relationships or in job relationships, they create an environment of chaos and distrust, wherein no one dares to make a decision for fear of "disappointing" the caretaker.

They do not set high standards or hold people accountable because that feels to them like overt control tactics and they have learned that, for them, these control tactics are not safe or effective. To do so would also create the true impression that the caretaker also wants to control things. This truth would create a level of integrity the caretaker is unwilling to assume at this time.

The reason we don't set high standards or hold people accountable to high expectations is that we are terrified that we will be required to live up to these same standards. In fact, we are generally expected by others to meet our own standards. That is the single best reason for setting high standards and holding others accountable for performance. We will rise to the requirements just as sincerely as those around us.

Other nasty habits which are practiced by all four *core values* are: passive aggression, "poor me" victim complaints, depression, anxiety, anger and rage, withholding feelings, discounting of others, etc. Yes, these types of strategies tend to appear more often in different *core values* types of people, but these behaviors slide around and get used across the board.

It is reasonable to make the generalization that certain behaviors seem to fit better with certain *core values*, the most notorious being that controlling tactics are most often adopted as part of the arsenal of *builders* and *bankers*, while *merchants* and *innovators* tend to opt for the land mine approach of caretaking.

20

Now that I know why I hate working with him, what do I do about it?

In the discussions that follow group testing using the *Core Values Index*, many latent and not so latent hostilities, frustrations, and resentments may come to the surface. This is one of the powerful benefits of the *CVI*. There is no need to be afraid of these arising conflicts.

My experience has been that the persons involved in the surfacing conflicts tend to grab the new information provided by the *CVI* like shipwrecked survivors being thrown life vests from a passing ship. They know they have to put them on before the life vests can have any value, and they know they still depend on others to help them get back on board the ship.

Just the knowledge that much of the conflict is derived from persons who simply approach life in different ways provides a major shift of attitude. *Merchants* tend to quit seeing *builders* as rude, arrogant, unfeeling S.O.B.s and more as *builders* who tend to resort to intimidating tactics when pressed or frustrated.

When the assumption of mean or negative motive is put aside and replaced with an understanding that the things I am experiencing (which I don't like) are simply survival tactics in the other person, much of the antipathy is removed from the situation. I can then see which tactics resound and clash with my own survival tactics and I can see that this interaction is exciting old personal dramas for me and possibly for others involved.

Builders still may find *merchants* irritating, but they will tend to have just a little more tolerance and may even decide that some forms of social niceties are not so disgusting as to be unacceptable business tactics, especially if a *builder* wants to have a more successful and productive relationship with the *merchants* in her life.

When we each become more aware that the posture presented by other *Core Values Strategies* is not personal to us, but is simply that person's chosen posture (strategy), we still may not invite them over for dinner. But we are given new tools (understandings) that will allow us to develop reasonably effective relationships with these people in a business setting. We will all waste a little less time bouncing off each other and more time focused on the business objectives at hand.

There are situations, however, where two or more people may have taken positions toward each other that are not easily surmountable with a few simple meetings. The individuals may not be able to go off together and reach a satisfactory resolution.

Often these strong oppositions and hostilities are encouraged by the management systems and business structures in the workplace. One involved person may be the boss which makes for an uneven battle between individuals. Occasionally, one of the parties is unwilling to bend in any manner in their approach to the others, or is unwilling to forgive or trust the other(s) again.

When two or more people appear to be focused negatively on others with whom they must work on a regular basis, the following procedures for conflict resolution are recommended.

Conflict Resolution

One uninvolved person, preferably with good management, listening, and negotiating skills, will facilitate. The facilitator will state the ground rules and ask each person if they are willing to abide by the rules. Obtain an audible "yes" from each participant.

The Ground Rules

1. When one person is speaking, the other(s) will listen. Interrupting is not allowed no matter how “wrong,” “inaccurate,” “stupid,” or “irritating” his statements may be.

2. Each person will be given the opportunity to hear the other(s). Each person will be asked by the facilitator whether he or she has more to say, before going on to the next person.

3. The facilitator will take notes on the major points being expressed by each person. If a participant repeats a complaint, accusation, or other point more than twice, the facilitator will acknowledge that the point has been covered and ask each other participant if they “heard” the point. Only “yes” or “no” answers are accepted here. Then the speaking participant will be asked to move on.

4. When each person has had a chance to speak, the facilitator will ask each to state their *dominant* and *secondary core value* and to share the most ineffective strategy or tactic which results from their *core value*. No feedback is allowed. Questions for clarity may be allowed as long as they are not leading and accusatory.

5. Once each has participated in this process, return to the list of concerns each has expressed. Reduce these concerns to a list of issues and ask the contributor of each list to agree that all major points have been covered.

6. Ask each other participant to acknowledge that they have heard the concerns and to state how and to what degree they feel they may be accountable for the ongoing concern. No interruptions.

Ask the question, “Is there anything else you might be willing to do to improve your relationship with [name]?” Note: Do not allow anyone to refer to anyone else as “him” or “her.” All comments must be directed to the individual and first names must be used.

7. Repeat steps five and six until all parties have been heard and all concerns have been confronted.

8. List any concerns that appear to be unresolved. Adjourn the meeting with the requirement that each person involved in the unresolved disputes or concerns will think about appropriate business solutions to the conflict and will also consider their own willingness to change their behavior to improve the effectiveness of their relationships. Ask for audible affirmation from each.

9. Reconvene a few days later and repeat steps 1-9, until all issues are resolved.

If one or more are unwilling to reconvene at a later date, or if the participants are too openly hostile to be reasonable in the opinion of the facilitator— if, for instance, one person is able to intimidate the other beyond a hope for open candid discussion— there are three options.

1. Separate the people so they do not have to relate to each other on a regular basis. Note: One or all are likely to re-ignite similar conflicts in their new teams no matter where they are, so you may just be postponing the inevitable. Postponement is sometimes a good strategy in business, but only if a time line is set and an appropriate re-hiring, training or other strategy is implemented during the postponement— something which will make the decision clearer or make the cost of firing an employee less costly for the company.

2. Terminate the employment of one or more of the participants in the conflict. It is amazing what happens within a department or small company when a major source of conflict is removed. The people remaining feel honored by the act. They also know they will be held accountable for their ability to increase their professionalism and job performance. As a result, the whole team benefits.

3. Require that one or more of the participants in the conflict obtain professional counseling or job training help, depending upon what the source of the conflict is determined to be. If this requirement is put forth, set a date for a meeting at which time the issues will be re-addressed and the conflict resolution process will be reconvened one last time.

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Employment Decisions

Those who wish to use the *Core Values Index for Employment Pre-Selection*TM or to create more clarity around a termination decision are encouraged to do so. This assessment is designed to provide immediate informative results within ten minutes. These results have a high degree of accuracy in classifying persons according to innate unchanging *core values*, *Contributor Type*, learning and decision styles, and much more. Many individual business values and beliefs are also revealed through this test.

Please be cautioned, however, that a purely statistical or “black and white” application of the *CVI* results is not recommended. The *CVI* is meant to provide additional, valuable information over and above that which can be gained through interviewing or skills testing. People, however, constantly defy assessments such as these and we who want to be most effective will never put aside wholly our own gut-level instincts, nor should we.

However, those of us who have been hiring people for many years, have learned to be highly skeptical of our own subjective judgments. Most of us have been fooled by people many times.

Please be careful and considerate in your application of the *CVI* results. This being said, you will find that most of the time the *CVI* provides a clear picture of a person’s attributes and *core values*. To the degree you have determined what kind of person will best fit a job position, your staffing decisions will be more successful if you find a good match validated by the *Core Values Index*.

Conclusion

Business managers have to manage every resource within their grasp in order to survive, in order to grow personally and build strong businesses. We tend to be adequate cash managers, inventory builders, customers and market managers, and production managers.

When it comes to people management, we often throw up our hands in disbelief and frustration, or give the ill-considered command, “If you can’t get it done, I’ll hire someone who can.”

Trouble in business begins with the hiring process, which is based on published resumes listing a person’s own perception of job skills, desired opportunity, and work history. This hiring process will seldom accurately reveal even a potential employee’s personality traits, innate leadership strategies, or their style of thinking.

Personality and psychological tests to uncover this kind of information are fraught with problems of false positive results, inconsistency, and low reliability. Because of the obvious context of various questions the person is able to understand what the question is trying to discover and then decide just how self-disclosing they are willing to be.

We have often heard of left-brained and right-brained people, but nothing provides us with an easy quantification of these mental approaches. Even if a tool offered easy access to this information, we would still be pressed to develop our own understanding of how to apply this knowledge to specific job requirements.

The fact is that there are many such assessment tools available today. In the next century few persons will be hired without undergoing a *core values* and thinking style assessment. The reason: performance on the job is far more determined by basic *core values* and communications styles than skills developed through work experiences. In the 21st century the average person will change careers 3-5 times.

The trouble continues after a person is hired. Personnel are assigned to departments to work under managers who may or may not approach life in a similar manner. Often variances in *core values* result in conflict, passive-aggressive behavior, open hostility, and subterfuge. The problems are more often linked to simple differences in style than to job related substance, and yet they consume valuable business energy—these conflicts waste human resources.

People who are assigned to jobs that don't align with their *core values*, tend to cause problems, procrastinate, and avoid showing up for work.

The typical response to such people issues is to begin treating the employees or managers as children, telling them what to do, reprimanding all concerned for their ineffectiveness, reinforcing fully understood business goals and objectives—all of which only deepen the conflicts, frustrate the teams, and consume more energy.

What is not done, is a full-scale assessment of each individual, comparing the individual's personal strategies to the job being demanded of him. Open sessions in which all players are able to hear the various characteristics, strengths and weaknesses of other *core values*, increase communications, decrease hostilities, and open the doors to tangible changes—a realignment of human resources toward more optimum utility.

It has been my experience that people, once made aware of their *core value* and that of those around them, rapidly respond by joining together to face problems, generate creative solutions, and build a team effort. This awareness itself, even without protracted training, offers most people enough knowledge that they as a group can make significant strides toward focusing their energies on business tasks, rather than non-productive positioning of one person against the other.

What business managers do not know about their employees controls the company. What the employees and owners don't know about themselves and each other, how they function and think, how they approach life—this ignorance dictates business results more than any other factor. Yet our understanding and knowledge of our most important resource is usually the last thing we consider when trying to solve a business problem.

There is no business problem which is not, in fact, a people problem. There is no business solution which is not, in fact, a people-based solution. Business managers must learn that people resources cannot be managed from a position of ignorance any more than can the accounting functions of the company. We must strengthen our knowledge in this area dramatically in the U.S. in order to maintain our competitive edge in the next decade and beyond.

We are past the time when hard-nosed business owners can push this kind of thinking off as “touchy feely stuff” or “baby-sitting.” The reality is that the business leaders who find themselves making these kinds of derogatory statements are those who are most ignorant of the power of appropriate human resource management, the pure effects of which can be measured on the bottom line.

Just as there is no license required for procreating and raising children, there is no knowledge required for hiring and managing people. Just being a company owner or a department manager suddenly makes me an expert. Most of us experts fail miserably in this area, at least with certain types of personalities. We are either constantly hiring people who irritate and frustrate us, or gather people around us whom we like but can't seem to manage sufficiently well to get the job done.

Before you make your next hire or job termination, learn more about yourself and your *Core Values Strategy*, your strategies for getting what you want. Learn more about the *core values* that will best fit your job opening, and then measure each potential candidate before making your decision.

You don't buy a computer without considering its appropriateness for the tasks required. Why hire a person without assessing the appropriateness of the innate unchanging *Real Core Values Self* of the person relative to the tasks required by the job.

It's not possible to separate a person from his or her *adapted personality* and changes in people are slow to come. But hiring a person for the *innate core values* energy of that person ensures right alignment of motivation and *Contributor Type* with the tasks of the job.

The immaturities of individuals are less likely to cause problems and, because the job suits the person so well, their adapted behavior patterns are seldom needed by them on this job in order to feel accepted and safe.

You also do not buy a computer without being very clear about why you are making the investment, what it will and will not do for you, what contribution it will make that justifies its purchase.

I find in company after company, large and small, that business owners and management leaders hire people constantly without really knowing the primary contribution they are expecting from that person and what tasks they will have to perform, how often, in order to achieve that objective. And, in this day and age, people tend to cost a lot more than computers.

Hire the person you want and need the first time and save money, time, and emotional stress. In order to manage your human resources, you must know your human resources. Success in business depends on it.

APPENDIX

To order additional copies of this book or other materials contact:

Manager

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Tukwila, WA 98188

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Although the principles of the *Core Values Index*[™] are relatively straightforward, the application of these precepts can be confusing and difficult at times. It is important for people who are going to administer these tests to fully understand the limits and the range of applications intended. Training sessions may be provided at the offices of *Taylor Protocols, Inc.* in Seattle, address and phone listed above; or we will be happy to come out to your facility, if you like.

Opportunities for Authorized Dealers and Value Added Resellers

Lynn E. Taylor, the author of the *Core Values Index*[™] and this handbook, is presently developing and training additional dealers/trainers. If you are interested in the Value Added Reseller (VAR) program, contact Lynn E. Taylor at the offices of *Taylor Protocols* listed above.

Taylor Protocols offers a full range of additional management training and consulting services. For additional information regarding ways to utilize the *Core Values Index*[™], or for seminars and intensive training sessions, contact: *Taylor Protocols, Inc.* at the above address.



About the Author

Lynn Ellsworth Taylor is President of Taylor Protocols, Inc., a professional business and human capital management firm in Seattle, Washington. He developed the *Core Values Index*[™] out of his need to hire the right people for the right jobs. He wanted to better understand, manage, train, coach, and motivate the people he was serving.

In the early 1980s Taylor worked with Dr. Ed Geiger to develop the first non-invasive cardiac output computer. This work required Taylor to help create algorithms for pattern-recognition and pattern-matching. In 1983, Taylor applied his algorithm knowledge to speech technology, creating the first IBM PC-compatible speech recognition system.

Frustrated with other tests that claimed to improve hiring and give insight into someone's personality, Taylor set off on a 15-year mission to perfect an instrument that could accurately measure the innate unchanging capacity of individuals to make certain kinds of contributions. He created a highly reliable 10-minute assessment that reveals a person's innate, unchanging *Core Values Nature*[™].

In 1998 he began using the *CVI*[™] and his diagnostic algorithms to develop *Top Performer Profiles*, the central technology of his new *Employment Pre-Selection Sciences*[™]. The accuracy of the tool and effectiveness of the sciences have allowed hundreds of companies to achieve extraordinary growth in the top and bottom line, simultaneously helping individuals find their place of highest and best contribution.

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"I believe there is no personality or leadership profiling system that will out perform *Taylor's Core Values Index*TM. No other evaluation tool takes the participant beyond business, social, and psychological understanding into the realm of the innate unchanging nature in each of us. No technology or system delivers higher productivity and greater business profits than his revolutionary *Employment Pre-Selection Science*TM. *Taylor's Core Values Nature*TM and] the related *Catalytic Values*TM are a transcendent new insight into the *Human Operating System*TM. It has truly changed the way I think about myself, the way I select and manage employees, and the way I communicate with others."

Glen Villalobos

National Executive, Human Resources
Volunteers of America

"I bought this book and used this test on myself and everyone in my company. We have rejuvenated our team and established a stronger business culture. The real surprise came when I gave the *Core Values Index*TM to my partner. We have re-established a stronger working relationship based upon better understanding and better communications. My thanks to Mr. Taylor.

Lori Kind

President
Business Exchange Center

"*This Core Values Index*TM assessment and the resulting *Employment Pre-Selection Science*TM, created by Taylor Protocols, informs better than the more expensive tests and allows me to evaluate employees and candidates for employment within minutes rather than weeks. Because the system is so reliable, we are able to pre-select future top performers, keeping us from making costly hiring errors. *The Core Values Handbook* has helped me to better understand what to expect from my employees and from myself. When it comes to finding and managing people, we all need all the help we can get."

Torrey Russell

Sales Manager
WinSales, Inc.

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