

Leadership Competencies – The Concept

A key success factor in any entrepreneurial venture, not-for-profit or otherwise, is leadership. Unfortunately, it can be very difficult to measure and it tends to be subjective. The best talent assessment systems are based on a **common language** – agreed-upon competencies that are defined with sufficient specificity to enable fact-based discussion, but are sufficiently simple to be applied broadly.

The goal of this project is to define a set of leadership competencies for SVP Boston that will: allow due diligence teams to add a degree of rigor to assessments of potential Investees; and provide leadership development to Investee Executive Directors.

These competencies are based on a more extensive set used by global executive search firm Egon Zehnder and have been adapted for SVP Boston use.

The proposed key competencies are:

- **Developing and Communicating a Vision**
- **Strategic Thinking**
- **Results Orientation**
- **Client Focus**
- **Team Leadership**
- **Collaboration and Influence**

These were chosen and designed to apply broadly to all leaders across any potential Investee.

Each of the next six attached pages contains the following:

- General definition.
- High level description of 4 levels of demonstrated performance.
- Specific behavioral indicators for the 4 levels.
- Suggested questions for assessors to get data to support the assessment.

The last page is a sheet the assessor will use to capture evidence of the competencies and “potential.”
It holds ratings and a summary of strengths and development areas.

Developing and Communicating a Vision

General Definition: This competency concerns creating a guiding vision for an organization. As distinct from a strategy, it is about determining where the organization wishes to have impact in the community. At lower levels, it is demonstrated by a strong desire to “do good” in some general area. At middle levels, it involves the ability to define a vision (or take full ownership of an inherited vision) that makes sense to key constituencies and communicate in a way that secures support and funding. At top levels, it involves development and communication of a truly compelling vision that energizes a range of constituencies.

Level	Description	Indicators	Questions to probe level
Basic	Wants to do good	<ul style="list-style-type: none"> • Has a positive attitude about making change. • Has an area of focus, but not well targeted. 	
Developing	Has articulated a vision	<ul style="list-style-type: none"> • Has framed (or owns) a vision that can be communicated both verbally and in written form. • The vision will have a clearly targeted problem, but may not yet fully “hold together” in a way that engages people. • Able to communicate the vision effectively, but perhaps not always able to “hook” the targeted audiences. 	<p><i>Someone who understands a need and has a sense for what can/needs to be done to address that need.</i></p> <ul style="list-style-type: none"> • What problems are you trying to fix? • What would the world look like if these problems were fixed?
Good	Has an engaging and well-defined vision	<ul style="list-style-type: none"> • Able to clearly articulate a tight vision: answers purpose, for whom, and desired outcomes; is concise and concrete – anyone can understand it; can be used to set strategy, allocate scarce resources, and measure impact; is differentiated from the competition. • Able to communicate the vision effectively through multiple media – engaging in public and able to develop (sometimes through others) effective written and electronic communications. 	<p><i>Someone who is a successful advocate of a vision.</i></p> <ul style="list-style-type: none"> • What is your vision? What groups of people does your vision resonate best with? • When you think about how best to communicate your vision, what things do you think about? • What are some of the different ways to discuss your mission with different audiences?
Exceptional	Recognized “visionary” in the targeted area	<ul style="list-style-type: none"> • Has a vision that is exciting and compelling – it immediately hooks targeted audiences and engages their support. • Able to communicate with audiences of different sizes and types in a compelling and energizing way – “charges people up”, even those who may not have an inherent interest in the issue area. • Knows how to pull different communication “levers” to get the word out and engage targeted constituencies. 	<p><i>Someone who owns the vision and can move others to action.</i></p> <ul style="list-style-type: none"> • What’s the typical audience response to your vision? Why do you think this is so? • Have you redefined your organization’s mission? Why? What role did you play? • How often do you revisit your organization’s vision?

Strategic Thinking

General Definition: This competency requires strong analytical and conceptual abilities as well as the ability to formulate a practical strategic plan. At low levels, it is about knowing the objectives for one's own area and where there are immediate opportunities for change; at middle levels, there is greater understanding of the organization's strategic context and the ability to contribute to it; at top levels, it is about generating an actionable strategic plan that integrates numerous complex issues over a longer term.

Level	Description	Indicators	Questions to probe level
Basic	Examines near term problems	<ul style="list-style-type: none"> • Thinks in terms of present problems and issues. • Understands this year's challenges. 	
Developing	Understands strategy	<ul style="list-style-type: none"> • Frames the right strategic questions. • Adapts short term plans as the organization's strategic priorities evolve. 	<p><i>Someone who can articulate short term priorities.</i></p> <ul style="list-style-type: none"> • Have you had to adapt the strategy in light of new challenges? If so, how did you decide on the strategic change to be implemented and why?
Good	Improves strategy	<ul style="list-style-type: none"> • Asks questions that open up new ways of seeing opportunities for impact. • Articulates evolving organizational priorities within a medium term horizon and incorporates understanding of other relevant organizations. • Integrates a variety of information into the definition of an actionable strategic plan. 	<p><i>Someone who can build a medium-term strategy.</i></p> <ul style="list-style-type: none"> • Is there anything that your competitors are doing (or that is happening elsewhere) that has significantly influenced your thinking about the organization? • What impact have you had on the organizational strategy?
Exceptional	Shapes new strategy – "Visionary"	<ul style="list-style-type: none"> • Has a clear view of where the organization needs to go beyond a 3 to 5-year timeframe. • Able to spot previously unidentified strategic opportunities. • Integrates market, competition, trends and other factors to frame strategic options for the organization. • Implements a successful strategy that challenges other players. 	<p><i>Someone can shape an innovative long term strategy</i></p> <ul style="list-style-type: none"> • Have there been strategic opportunities which others in the space had not spotted and which you were able to exploit successfully? • Has the strategic direction you have given to the organization influenced other players to change their approach? In what ways?

Results Orientation

General Definition: This competency is about being focused on improving operating results. At low levels, it is about wanting to do things well or better; at middle levels, it is about meeting and beating goals; at the top levels, it is about transforming an operating model for significantly improved results.

Level	Description	Indicators	Questions to probe level
Basic	Works to tasks	<ul style="list-style-type: none"> • Works to complete assigned tasks. • Delivers as long as there are no major obstacles. 	
Developing	Delivers	<ul style="list-style-type: none"> • Energized by working toward a specific goal set by others, overcoming obstacles, setbacks and uncertainty. • Plans for contingencies to ensure delivery. 	<p><i>Someone who consistently delivers.</i></p> <ul style="list-style-type: none"> • Did you have to overcome any major obstacles to deliver the targets? • What were they and how did you deal with them?
Good	Works harder	<ul style="list-style-type: none"> • Energized by a challenge. • Sets new and stretch goals for self or team. • Uses data to identify appropriate stretch goals – looks for benchmarks. • Exploits opportunities to exceed goals, even under adverse circumstances. 	<p><i>Someone who delivers beyond expectations.</i></p> <ul style="list-style-type: none"> • Have you ever pushed your team to go beyond agreed targets? What stretch targets did you choose and why? <p><i>Someone who achieves best-in-class business performance.</i></p>
Exceptional	Works smarter/ achieves break-throughs	<ul style="list-style-type: none"> • Works smarter not just harder, and learns from mistakes. • Finds ways to “change the game” to gain incremental/measurable performance increases. • Delivers performance that stands out in the relevant space. • Implements best-in-class standards. 	<ul style="list-style-type: none"> • Is there any area of your organization where you think you have identified and achieved the introduction of best-in-class standards? What did you do and how do you know they are best-in-class? • Is there an example of where you have changed how things are done to “take it to the next level”?

Client Focus

General Definition: People demonstrating this competency have a deep understanding of their “clients” – with “clients” defined as anyone who receives their services (which could include partners as well). At lower levels, it involves being responsive to client feedback and requests. At the middle levels, it involves measuring and tracking client satisfaction and taking steps to deliver at high levels. At the top levels, it involves forming a deep understanding of the client such that needs can be anticipated and breakthrough performance delivered.

Level	Description	Indicators	Questions to probe level
Basic	Responds to Clients	<ul style="list-style-type: none"> • Responds to client requests. • Has a basic understanding of different client groups. 	
Developing	Works to Deliver for Clients	<ul style="list-style-type: none"> • Gathers information about the client. • Seeks feedback from clients and takes actions to improve. • Understands the importance of different client groups (end users, funders, partners, etc.) and can define them. 	<p><i>Someone who works to deliver.</i></p> <ul style="list-style-type: none"> • How do you interact with your clients? • What steps do you take to improve client satisfaction?
Good	Focuses the Organization on the Client	<ul style="list-style-type: none"> • Puts in place systems to monitor client performance – establishes metrics and sets targets. • Focuses the organization on client needs – sets the example and take steps to ensure the client is at the center of the operating model. • Knows the different client groups well, and specifically how each is important to accomplishing the mission. Prioritizes across groups. 	<p><i>Someone who focuses on the client.</i></p> <ul style="list-style-type: none"> • How do you know your clients are happy? • What metrics do you use to track client satisfaction, and how do you use the data? • How do you prioritize between your different external constituencies?
Exceptional	Gets Out in Front of the Client	<ul style="list-style-type: none"> • Develops deep partnerships with clients, sharing information openly and effectively. • Uses this information to develop deep insights about the client, such that the organization can truly think as the client and anticipate needs. • Has clearly defined objectives and tailored approaches for each client group and is effective working across the different groups. 	<p><i>Someone who gets out in front of the client.</i></p> <ul style="list-style-type: none"> • Has there been a time when you identified a client need before the client did? Where did the insight come from and how did you proceed? • How has the organization built the capability to make sure each different client group gets the appropriate amount and type of focus?

Team Leadership

General Definition: People demonstrating this competency can focus, align, and build effective groups among direct lines of reporting. "Direct lines of reporting" refer to those who report to or receive direction from the individual (including volunteers). At low levels, it is about a more command and control style of leadership, providing goals, but not a sense of purpose. At middle levels, one actively engages the team in managing itself and driving performance. At top levels, one empowers the team, delegating authority with the intent of enabling the team to work effectively without direct management.

Level	Description	Indicators	Questions to probe level
Basic	Builds and Directs	<ul style="list-style-type: none"> • Selects capable staff members and assigns tasks appropriately. • Tells people what they need to do. • Sets objectives without discussion. • Expects people to follow with little guidance. 	
Developing	Evaluates and Involves	<ul style="list-style-type: none"> • Sets and monitors individual performance standards; gives feedback regularly. • Allows input and opinions to help form decisions and plans. • Respects concerns and limitations of individuals in assigning tasks. • Checks team's progress against milestones. • Aligns volunteers and keeps them motivated. 	<p><i>Someone who is open to input from the team.</i></p> <ul style="list-style-type: none"> • How do you set priorities for your team? • How is your team contributing? • How do you keep track of the team's progress?
Good	Develops and Collaborates	<ul style="list-style-type: none"> • Trains, mentors, and coaches people to optimal performance. • Actively engages the team to develop plans and resolve issues through collaborative problem solving. • Gains commitment using logic. • Agrees on individual tasks based on previous experience and shows team how their work fits in with what others are doing. • Holds individuals accountable and rewards those who deliver to plan. • Engages volunteers to secure their best efforts and increase participation for the organization. 	<p><i>Someone who proactively obtains team input.</i></p> <ul style="list-style-type: none"> • Was there a time when you needed the team's input on how to take forward an important initiative? How did you solicit your team's views? • Can you describe how you allocate tasks between your reports?
Exceptional	Promotes, Empowers/inspires	<ul style="list-style-type: none"> • Recognizes, rewards, and promotes exceptional performers with potential. • Plans for succession. • Agrees on responsibilities based on insights into individuals' potential as well as experience, taking calculated risks where appropriate. • Truly empowers the team to identify and solve problems, providing necessary support – delegates effectively. • Creates a clear sense of team identity where people feel emotionally committed to the team. • Encourages the team to identify initiatives beyond original mandate and acts as a thought partner. 	<p><i>Someone who empowers team members.</i></p> <ul style="list-style-type: none"> • How do you decide what to ask of each of your team? • What do you do to encourage the team to go beyond what is being asked? Give me examples of times where your team has surprised you with an initiative which was not part of your original mandate. <p>(Note: References from team members are critical for assessing this competency.)</p>

Collaboration and Influence

General Definition: This competency is about working well with others with no direct line of reporting. At low levels, one simply helps if asked and supports people when required. At middle levels, it is about being a team player and influencing others to get things done and building ties across key constituencies. At top levels, one proactively creates partnerships and effective teams where none existed before, including outside constituencies; building tight and lasting alliances among a range of stakeholders with varying objectives.

Level	Description	Indicators	Questions to probe level
Basic	Supports	<ul style="list-style-type: none"> • Participates in teams. • Instructs rather than engages. 	
Developing	Engages	<ul style="list-style-type: none"> • Prefers working in groups. • Asks questions, tests assumptions and openly discusses issues. • Actively listens and responds to the concerns of others. • Builds informal networks internally and externally. • Understands the objectives of different stakeholders (volunteers, funders, partners, etc.). 	<p><i>Someone who actively engages with colleagues.</i></p> <ul style="list-style-type: none"> • [When discussing a major achievement] Did anyone have any concerns about the changes you were proposing and how did you deal with their issues? Did any of them have ideas that you incorporated into the final plan?
Good	Motivates	<ul style="list-style-type: none"> • Actively seeks input in decision-making and invests in building relationships with others. • Actively contributes to the broader organization, showing others how their objectives align with own, or compromising on own preferences where necessary. • Able to connect effectively with outside organizations and build bridges that help align different groups. • Is a “magnet” for outside help, pulling in and engaging volunteers, not only for basic tasks, but in a variety of ways to forward organizational objectives. 	<p><i>Someone who inspires others to work with them.</i></p> <ul style="list-style-type: none"> • Was it difficult to get them to contribute their time, and if so, how did you persuade them? <p><i>Someone who facilitates others to work together to a common goal.</i></p> <ul style="list-style-type: none"> • Has there been an important initiative which you have led that required you to work across organizational boundaries? What did you do to get their involvement and what was key to making it work?
Exceptional	Partners	<ul style="list-style-type: none"> • Brings people together across boundaries to share best practices and actively engages colleagues to make joint decisions. • Takes calculated risks to advance a collaborative relationship, foregoing personal objectives for the benefit of the group. • Persuades others to willingly pursue a course of action against their initial inclination. • Able to develop complex alliances among a range of different stakeholders, aligning various interests, finding creative “win-win” solutions, and moving the parties to action. 	<ul style="list-style-type: none"> • Where have you built a “win-win” partnership with an external constituent? How did you do it?

Summary Sheet

Name					
Date					
Current role					
Career history		<ul style="list-style-type: none"> 			
Key competencies needed in light of organizational challenges		<ul style="list-style-type: none"> 			
Competencies		Basic	Developing	Good	Exceptional
	Developing and Communicating a Vision				
	Strategic thinking				
	Results Orientation				
	Client Focus				
	Collaboration/Influence				
	Team leadership				
Potential	Competencies				
	Motivation and Drive				
	Ability to Learn				

Notes/Key Examples

SUMMARY

Strengths

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Areas for Development

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