

Build the right team – understanding roles Phillip J Swiler – VSA/Lake Wissota

Discussion

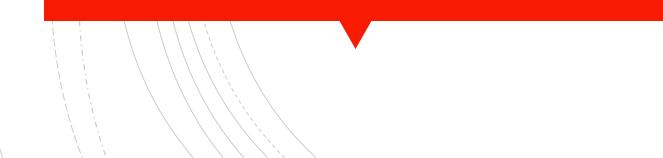
Role Types

Manager OR Coach?

Team Adjustments and Priority for the TEAM

Develop and TRUST the Process

Takeaways







Role types (9)

- Shaper
- Implementer
- Complete Finisher
- Plant
- Monitor Evaluator
- Specialist
- Coordinator
- Teamworker
- Resource Investigator

This is powerful.

WHO do I hire?

HOW do I hire?

Do I personalize when I hire? Someone Like ME?

What stands out? Comfort? Pressure?

Do you hire the same Role type all the time? *WHY?*

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Evaluate the role that is needed, not what YOU want.

Be honest to the core – Trust your instincts

Do you have a Hiring "Culture" (the answer is yes, you do)

What are you afraid of? Do we hire on GUT feel? Rehearse your response in the conversation

Have a clear idea if what is needed to be *consistent* and productive

Maintaining *expectations* during the Interview is essential for projecting tactful expectations. Consider the following tips for hiring the right role:

Actively listen! Pause and reflect, give them time to talk Ask scenario based real world questions teamwork *creates* dreamwork

Long term impact

COACH versus "Manage"

Standard of Excellence – Do you have?

Develop along the way, possible role change if needed – what is best for the role and business

Communicate their role during 1 on 1's, get input as to what *THEY* are good at.

Coach daily, Fierce Conversations if needed and Be real



Role Hire Development Standards

Open Position	Role Indicator	Priority	Hire by
Loan Officer	Resource Investigator	1	4/30
Teller	Teamworker	4	6/1
Credit Analysis	Implementer	3	5/30
Treasury Management	Shaper	2	5/15
Marketing Coordinator	Coordinator	5	7/15

Final tips & takeaways

Consistent rehearsal Strengthen your familiarity Refine Hiring style Standards, Onboarding Timing and transitions Aim for seamless, professional experience Practice audience Grasp Roles, Embrace Change

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ADAPT COACH CULTURE

Thank you

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