



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

WHO do I hire?
HOW do I hire?

This is powerful.

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?

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

ADAPT

COACH

CULTURE

+

○

●

+

○

●

Thank you

Phillip J Swiler

715-523-9761

pjswiler@yahoo.com

