

Selecting a Leader: Do We Know What We Want?

By David Maister

If you read many articles or books on the desired qualities of a CEO or a managing partner, you can get very confused. The list of desirable character traits, attitudes, skills and philosophies seems endless.

You can get the same impression looking at the job descriptions that many firms put together when searching for a new leader. There is often a long list, including both “qualifying” characteristics (such as “integrity”) that most realistic candidates are likely to possess, as well as a number of factors that will truly distinguish the best candidates.

Very frequently, the desired characteristics that are listed are in conflict with each other. For example, firms often say that they want their leaders to be both decisive and consultative. These are both virtues, but there is a risk that they can neutralize each other as a guide to choosing the best candidate.

Similarly, it is not uncommon to find firms who say they want leaders who are especially adept at being active *externally* (dealing with clients, shareholders, the media, the community) and also be active *internally*: motivating people, readily available, and managing the firm’s affairs. These two skill-sets are not the same. Taken together, the message can be confused, if not completely contradictory.

The situation can be made even more difficult. Many firms make lists of *generally* desirable characteristics of a leader, failing to recognize that the best set of attitudes, skills and behaviors depend on the individual firm, the specific opportunities and needs that the organization faces, and (for example) how ready the organization is to make changes.

After all, there’s no point selecting an Olympic-level coach for a team of people who don’t want to play that game. There’s no point appointing a skilled cost-cutter if the primary strategic need is to grow revenues in new markets!

For professional firms run on “partnership” principles, the bar is raised even higher. Unlike a corporation, which can (and usually does) select its leaders according to the views of a relatively small Board, the choice of a new leader in a professional firm usually requires taking into account the preferences, desires and ambitions of a broad group of partners, shareholders or senior vice-presidents.

The need for this is not driven (just) by ideals of democracy, participation or consultation. It’s about ensuring the organization’s understanding and acceptance of the CEO’s (or managing partner’s) mandate.

All too often, I have seen CEOs and managing partners criticized, resented

and made relatively ineffective by being judged (both by their Board and those they manage) on aspects of the role they were not chosen to perform.

As I pointed out in a previous article “Accountability: Effective Managers Go First” (www.davidmaister.com/articles), it is hard to hold a leader accountable if there is not a clear, unambiguous understanding of the role. Many leaders prefer it this way: they like the freedom of action that comes from an unambiguous role. However, as my co-author Patrick McKenna points out, leaders are, inevitably, going to *be* judged: wouldn’t it be better for all concerned to know, in advance, and with clarity, what the true, real expectations are?

This seemingly obvious principle is widely neglected in practice. In many firms, in many industries, in many countries, I have learned, people are appointed to managerial positions without detailed consideration of the requirements of the role.

Many firms go directly to a discussion of the merits of individual candidates, based on a very general job description, without priorities established among the characteristics listed for the “CEO search.”

If, however, you (first) have an in-depth discussion of what you seek in a leader, the weighting given to competing virtues can be discussed dispassionately, and not be excessively influenced only by the specific candidates involved.

A Diagnostic Tool

In order to assist with this process, I have designed a simple diagnostic tool that can be used to facilitate your firms’ discussions of the characteristics it seeks in a leader.

In the questions that follow, there are a series of “paired” qualities that a good leader might possess. In each case, either quality in the pair might be desirable, and (perhaps) an equal balance desirable.

However, the point of pairing these qualities is to ask: if there HAD to be a choice between the two items in the pair, which would each respondent really prefer in a leader?

A simple way to “force” people to think through their preferences (and also to provide a simple way to aggregate the views) is to ask them to allocate 100 points between each of the paired items. Thus, if the respondent thinks the CEO should be mostly focused on the external community rather than inside the firm, he or she could allocate 90-10 or 80-20 to the “outside / inside” pair.

So, what are the “either / or” choices you might present to your firm? As you scan the alternatives below, bear in mind that either side of the pair is (or can be) a virtue in a leader. The issue here is to set priorities, avoid ambiguities and conflicting messages and force some clarity.

Do you want your CEO / Managing Partner to be someone who...

- Focuses on working inside firm *versus* focuses on a high profile with clients and marketplace
- Is good with numbers *versus* good with people
- Leads in accordance with a strong personal ideology of his or her own, *versus* be the kind of person who tolerates different views, values and approaches
- Has a track record of generating business, *versus* a track record of managing people well

- Is the type of person who thinks we need to make big strategic moves, even if they involve bigger risks, *versus* someone who thinks we should make small, incremental changes
- Has strategic acumen personally, *versus* the ability to facilitate and let others innovate and make strategic choices
- Has the best business qualifications, *versus* has the best character qualifications
- Prefers to confront problems early, even if this can be disruptive, *versus* the kind who avoids conflict until it's necessary to tackle it
- Focuses on preserving the firm's historical culture *versus* changing the culture to adapt to meet new challenges of the marketplace
- Moves fast *versus* someone who acts deliberately
- Emphasizes ambition and growth, *versus* someone who emphasizes caution and risk management
- Emphasizes reasoning and logic *versus* someone who emphasizes emotion and excitement
- Acts as a peer, a first among equals, *versus* someone who is clearly a leader and will manage that way
- Is primarily a "businessperson" *versus* being "ideology-driven"
- Acts as the firm's "face" or "identity" in the media, *versus* someone who facilitates others achieving a high profile
- Is a fresh face *versus* a known quantity
- Is very self-confident, *versus* someone who acts with humility
- Already has a clear view of where we need to go and what we need to do, *versus* someone who will

develop that with us after appointment

- Is a pragmatist, *versus* a visionary
- Primarily has a "hard head" *versus* a "soft heart"
- Focuses on getting things done (i.e. a "driver") *versus* someone who focuses on getting it right (i.e. an "analytical")
- Has an introverted style, *versus* someone with an extroverted style
- Focuses on capitalizing on short-term opportunities, *versus* someone who focuses on long-term wealth creation
- Makes changes through dramatic, big moves, *versus* someone who makes changes through continuous, insistent pressure
- Sets the example of hard work, *versus* someone who lives a balanced personal / work lifestyle
- Is diplomatic, *versus* someone who is "straight-talking."
- Is usually sympathetic to people's personal problems, *versus* is unwilling to allow sustained underperformance.
- Has a track record of personal professional success, *versus* has a track record of building an organization
- Is usually trusting of others, *versus* not easily fooled
- Prefers to manage people directly, *versus* prefers to work through others
- Is decisive *versus* consultative
- Is hands-on, involved in the details, *versus* hands-off, sets the direction and then holds people accountable

Naturally, it is possible to adapt this questionnaire to your own firm, inserting key trade-offs that I have omitted and deleting ones you think are less critical to your firm.

The key is to make the choices difficult, so that people are forced to reflect on what characteristics a CEO or managing partner *really* requires.

Mechanistically, I have also used other ways to “force” people to indicate preferences. Instead of allocating 100 points, respondents could be asked, for each pair of virtues, to choose one point on a four-point scale:

1 = the leader should possess the first quality MUCH more than the second quality;

2 = the leader should possess the first quality a LITTLE more than the second quality;

3 = the leader should possess the second quality a LITTLE more than the first quality;

4 = the leader should possess the second quality MUCH more than the first quality.

Because we are trying to ask what people would choose if it really came to a choice between the two qualities, there would be no “middle – equal balance” option in this version. In this way, *true* priorities are more likely to be revealed.

Using the Tool

Begin by circulating the questionnaire among the relevant participants (partners, shareholders or senior vice-presidents.) When everyone has contributed their views, charts should be prepared showing both the weighted average view and (this is important) the distribution of views, so that it is clear where the shareholders, partners or senior executives are of similar minds, and where they have divided views.

The results thus obtained should then be used for an open debate which tries to reconcile the differing views, and thus

can serve an important educational, bonding and strategy-setting function.

The point of the polling is not to suppress debate, but to identify the subjects most worthy of debate. Areas of consensus can be quickly noted, and discussion focused on topics where there is a disparity of views.

For example, some participants may enter the process thinking that the CEO or managing partner should be a primary business-getter, while others think differently. Through debate, a better, healthier consensus may be forged about what the priorities are, not only for the CEO, but for the firm.

There are built-in flaws in any discussion of desirable leadership characteristics. For example, when asking people for their views about what they look for in a leader, (using this approach or any other) there always exists a tendency for “regression toward the mean.” People tend to express preferences in comparison to the existing (or recently departed) leader, rather than absolute ones.

For example, if a previous leader has been noted for tilting the balance toward decisiveness rather than extensive consultation, there will be a tendency for people to vote for the new leader to be more consultative. And, of course, vice versa.

Once you have completed a first-round survey using these “paired characteristics,” you will probably still have a lengthy, multi-item list of desired traits. It will usually be necessary to conduct a second round of the survey by creating new “either / or” choices from the surviving criteria.

Repeated rounds of “forced choices” may sound onerous, but eventually you

will emerge with a clearer focus on what kind of leader is desired, and more support for any new leader chosen in line with the carefully debated, unambiguous, non-contradictory criteria.

To facilitate the ability to hone in on the few key descriptors that summarize the group's preferences, I often run meetings on this topic using "audience response systems" where each person has a (wireless, electronic) keypad and can quickly vote (anonymously) with the group results being shown instantaneously on a screen in front of the whole group.

The virtues of this system are many, but three stand out. First, there is no requirement to pre-program the questions, and the time from phrasing the question to seeing the views of the group is only a few seconds. Because of this, if a vote is ambiguous, or seen to be poorly phrased, a re-vote is possible immediately.

Second, the ability to conduct sequential "rounds" of voting enables the group to really test its key criteria. For example, if a list of ten criteria "survive" as the most desirable (or consensus) characteristics, it is easy to reduce the list to the most important five or six by repeating the pairing process instantaneously, asking "If you could only have one of these, which would it be?"

Finally, the fact that audience response systems are based on computers means that the group is able to "capture" the expressions of views that were made, and use them in future deliberations and decisions. What used to be called "a paper trail" is automatically created, which can be referred to long after to remind people of views expressed at the meeting.

Summary

If you are like other firms with whom I have used this exercise, you will find that it will force many participants to really reflect in depth (many of them for the first time) what kind of leader they truly think is best for the firm and, perhaps more importantly, what kind of leader they are prepared to accept and be guided by.

By the way, even if you do not have a broad group with whom you are required to be consultative, the "forced-choice" questionnaire can still be a helpful tool. I have used it with relatively small corporate Boards of Directors where there can also be a need for clarification and choice among competing criteria when appointing top corporate officers.

You may be surprised that, when faced with competing virtues, some of your colleagues will make surprising choices. You may also be surprised by the amount of unanimity that often exists in what people seek in a leader.

Your firm will then be in a good position to examine your candidates, and choose the right leader, at the right time, for where your firm is today and where your organization is prepared to go.

If you can clarify your criteria, it will be easier to recognize the best leader for you. If your criteria are confused, it will be very hard to make a sensible choice. The effort described here is as nothing compared to the benefits of making a better leadership choice.

This article will appear in the Silver Anniversary issue of *Leadership Excellence*. (www.eep.com)



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