

Leadership – Coaching, Culture & Competencies

Presentation to CAW Network USA

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Learning Objectives

1. Managing and successfully navigating new leadership dynamics
 - ☐ Setting yourself up for success – not failure
 - ☐ Establishing a healthy team / leader dynamic
 - ☐ Understanding and leveraging core leadership competencies
2. Creating high Performing team / Cross Functional collaboration and partnership teams & leading in a global multi-national cultural context
 - ☐ Networking / Advocacy & Navigating Politics
 - ☐ Overcoming assumptions / biases and pivoting to strategies for success
3. The art of mastering Assurance Leadership Competencies
 - ☐ Positioning to be catalysts for positive organizational change
 - ☐ Differentiating between the WHAT and the HOW

Poll 1:

Culture informs purpose: Builds pride and brand.

- Agree
- Disagree
- Don't know

Brian Jones

Critical Leadership
Competencies for New Leaders



Areas of Focus for Leaders at all Levels

Team & People	Customers (Int/Ext)	Market	Systems & Processes	Legal & Compliance	Culture
<ul style="list-style-type: none">• Right people doing the right thing in the correct way• "What" people do & "How" they do it• Delegation & Accountability	<ul style="list-style-type: none">• What is Critical to Quality for Customers?• Ease of doing business: what do your customers say?• Are you focused on change or complexity?	<ul style="list-style-type: none">• Have awareness of firm's position in market• Helps you understand business context	<ul style="list-style-type: none">• Where do poor S&Ps create risk?• Where do they delight or irritate customers?• What are opportunities to simplify, automate & error proof processes	<ul style="list-style-type: none">• Is the compliance culture sufficient?• "Tone from the Top"• Are controls sufficient & appropriate?• How sensible are staff for rep. risk of poor compliance	<ul style="list-style-type: none">• Aspirational vs. Lived• How close are you to the Aspirational?• How do you "walk the talk"• Culture informs purpose: builds pride & brand• Important to employee engagement & retention

Priorities Matter: *What are the 5 things Which Will Get You Fired if Not Done?*

Areas of Focus Failure Modes: Where it Goes Wrong



Team & People

- Failure to drive accountability for outcomes
- Being “nice” rather than “clear”
- Playing favorites
- Poor processes (e.g. calibration, 9 Blockers, Rack & Stacks)
- Reward and Performance not tied together

Customers (Int/Ext)

- Team operates in a parallel universe
- Not tied to customer or stakeholder needs
- Failure to adapt to customer behaviors or needs
- Result = irrelevance

Market

- Failure to adapt to changes in market
- Failure to have line of sight to competitors and replacement products/services
- Result = irrelevance/obsolesce

Systems & Processes

- Customers and employees irritated by poor S&P
- Increase in risk to organization & reputation
- Inefficiency creates opening for competitors

Legal & Compliance

- Reputational Risk
- Financial Risk
- Loss of personal liberty (jail)
- Loss of employment

Culture

- Missed opportunity to motivate
- Distance between aspiration and lived can breed cynicism
- Damage to brand
- Damage to employee retention & motivation
- Paint the picture of where you want to culture to be: what does good look like?

Unfocused Leadership Leads to Poor Outcomes on all Dimensions

Poll 2:

To build a high performing team you need to set clear goals and vision.

- Agree
- Disagree
- Don't know

Nikki Mamedova

Leading High Performance
Teams and Achieving Cross
Functional Excellence

Building High Performing Teams

- ☐ Set clear goals and vision
- ☐ Foster open communication
- ☐ Earn trust
- ☐ Avoid favoritism
- ☐ Say “thank you”
- ☐ Be your team advocate
- ☐ Create opportunities for growth
- ☐ Don’t micromanage!



Integrated Performance



Strategies for Effective Cross-Functional Collaboration

- ❑ Align around shared goals — not just functions
- ❑ Clarify roles and interdependencies early
- ❑ Build mutual accountability across teams
- ❑ Lead with trust and transparency
- ❑ Collaborate, don't compete!
- ❑ Celebrate joint wins and share credit



More Successful Together



Navigating Internal Politics and Internal Networking

- ☐ Understand your company power players
- ☐ Build strategic relationships
- ☐ Read and adapt to your company dynamics
- ☐ Manage conflicts diplomatically
- ☐ Find allies
- ☐ Network strategically
- ☐ Find your sponsor/ advocate



Positioning For Success



Nancy Chakabuda

Cultural Leadership in a Multi-
national World

Cultural Leadership & overcoming biases

- Nancy Chakabuda CA (SA), CPA, MBA



“The culture of an organization is a shadow of its leader”

- Edgar Schein

Cultural leadership

The Hallmark of Global Leadership

What IS Cultural Leadership?

Leadership that drives positive and congruent behavioral changes within teams and beyond, that ultimately leads to upholding organizational values and achieving common goals.



How can one effectively lead cross-cultural teams?

The Challenge

Communication

Different communication norms.

Culture & value conflicts

Culture influences on view of leadership & values.

Stereotypes & biases

Existing perceptions that influence behaviors and interactions.

Environment influences

External factors (environment & societal norms) influence an individual's behaviors.

Beyond traditional management

Building cultural leadership as a **key competency** for the Global Leader

1. Cultural intelligence (CQ)

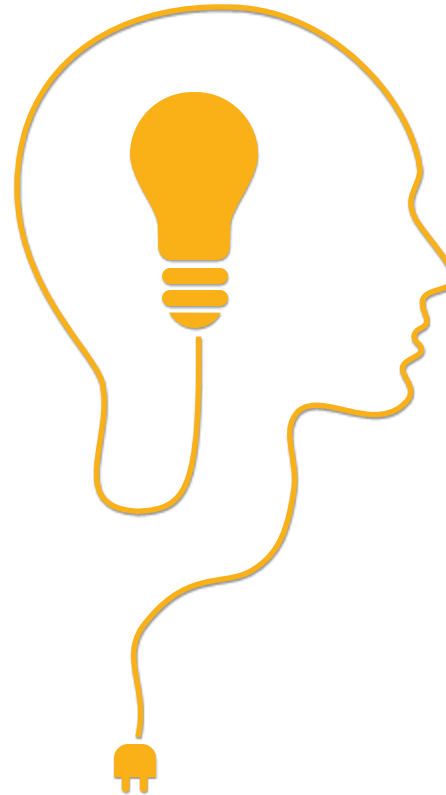
INTERCULTURAL KNOWLEDGE

Intentionally seeking/ building an awareness and understanding of culture, social norms, and how they influences behaviors and interactions.

CULTRUAL ADAPTABILITY

Adjusting one's behaviors when interacting with different cultures in a way that minimizes perceived differences and establishes common ground.

“Cultural intelligence picks up where emotional intelligence leaves off..” – Roger Duncan



2. Cultural influence (CI)

SHARED VALUES

Leveraging cultural intelligence to shape & balance commonality in prioritized values, while understanding cultural differences & embracing local ideas & perspectives to help align teams & resolve conflicts timely.

EFFECTIVE COMMUNICATION

Using simple and clear messaging while leveraging non-verbal but culturally effective modes to communicate vision & expectations.

“The true measure of leadership is influence...” – John Maxwell

Practical tips for global leaders

Leading cross-cultural teams successfully

1. INVEST

Invest in your people – training, resources and external parties to facilitate cultural awareness, activities and work practices within teams.



2. CLARIFY

Create **structure and transparency** on decision-making models to clarify expectations, team norms and foster consistency towards goals. Ensure teams are aware - embed KPIs for better accountability.

3. EXCHANGE

Cultural exchange - embrace and /or acknowledge key celebrations in different cultures (cultural holidays), while creating focused opportunities for teams to share their cultural history and influences (builds psychological safety & inclusiveness).



Practical tips for global leaders

Bias: a barrier to effective Global Leadership

Overcoming biases and assumptions

Similar-to-me (Affinity), Proximity, Confirmation biases.



“Leadership bias is the hidden enemy of successful leaders”

- Shaan Madhavji

Building the bridge with 5 simple practices

1. **Self-reflection** – self-awareness, reflection and intentional practices (role-modelling).
2. **Seek feedback** and / or external opinions.
3. **Ask questions** - learn and understand different perspectives.
4. Provide **structured feedback** – fact-based views to limit bias creep.
5. **Inclusiveness as a KPI** for self and others – accountability & support through training & resources.

Poll 3:

Leadership is a journey of continuous learning and adaptation.

- Agree
- Disagree
- Don't know

Shane Rogers

Assurance Leadership
Competencies

Leadership in Assurance Teams

- ☐ Connect on common forward-looking vision, thriving & caring
- ☐ Challenge / change agents
- ☐ Agility & risk responsiveness
- ☐ Progressive - big picture perspective
- ☐ Relationship building
- ☐ Informal relationships
- ☐ Trust, integrity & transparency



DELIVER VALUE



Skills make you useful

but

**Behaviors & Character
make you valuable**



Leadership is an art as much
as a science

Assurance leadership is built
around trust

How and why trump what

It's a journey of continuous
learning and adaptation



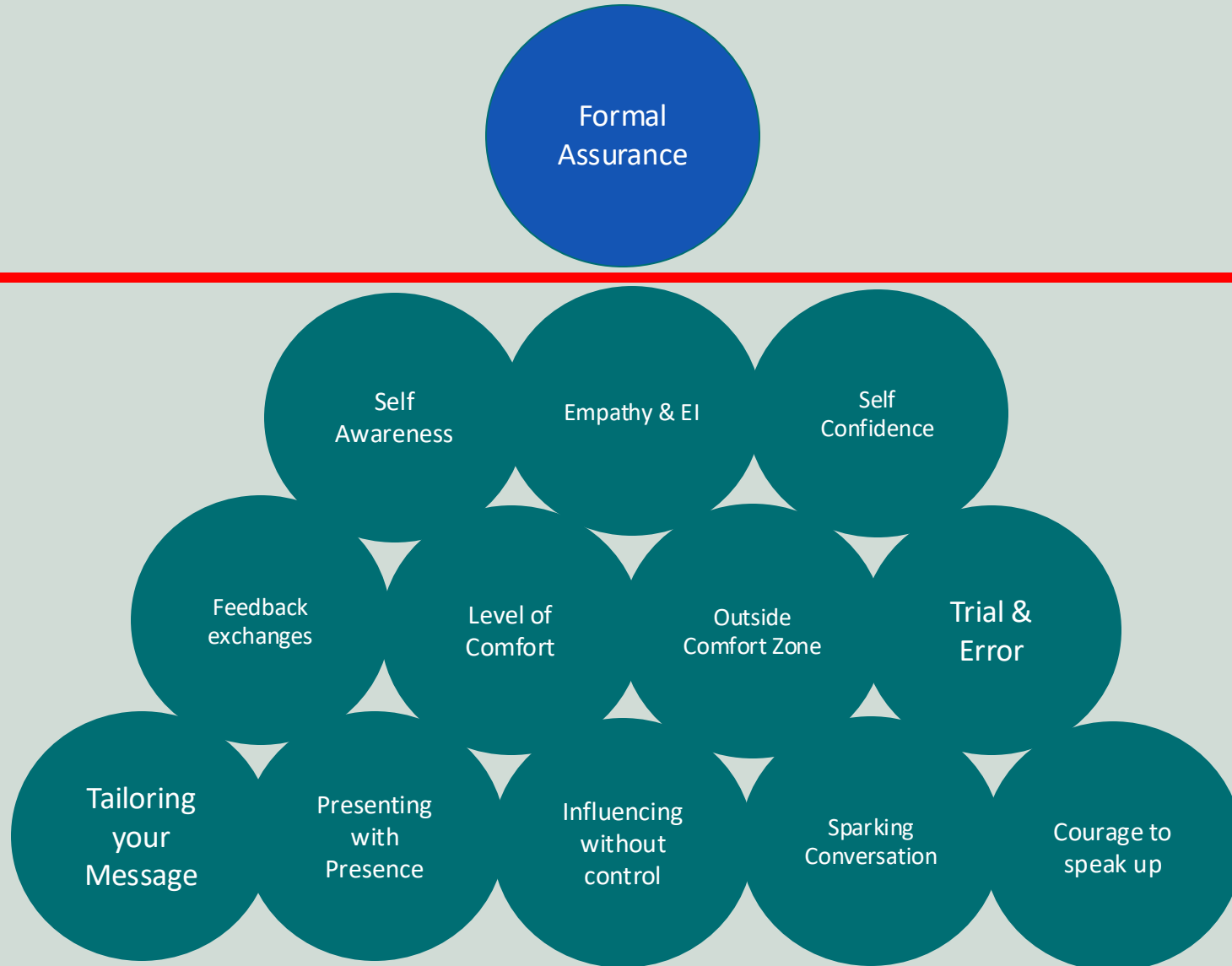
Assurance Leadership Competencies

**Formal skills-based
assurance**

supported by:

**Informal –
behavioral &
character-based
competencies**

Assurance Leadership Competencies



FORMAL – Skills based

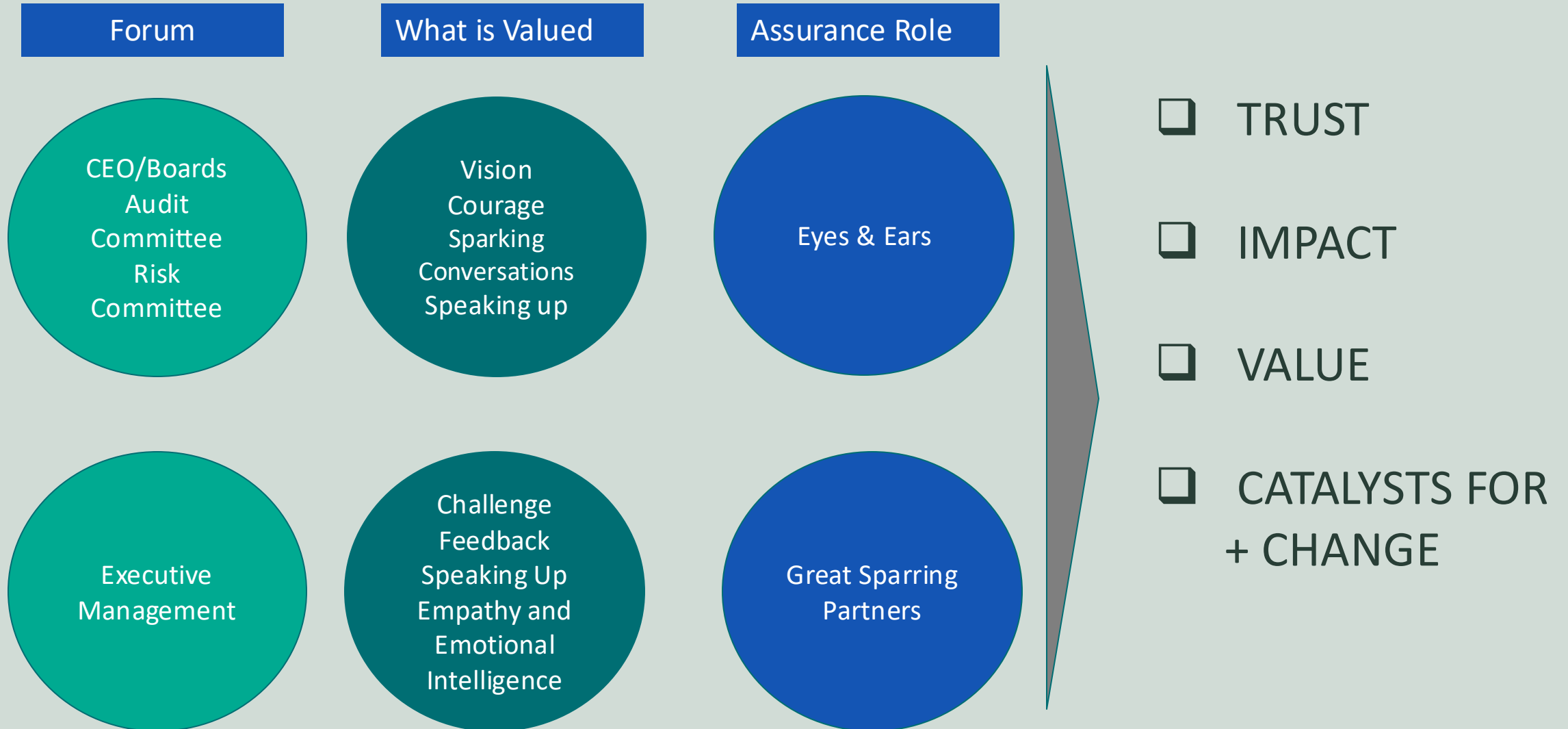
- ☐ provide assurance
- ☐ identify issues
- ☐ ratings, reporting, opinions, & stewardship

Supported by:

INFORMAL – Behavioral & Character-based

- ☐ build trust
- ☐ develop relationships
- ☐ exert influence without control
- ☐ sharing ideas
- ☐ compelling insights
- ☐ prompt shared call(s) to action
- ☐ receive and provide feedback

Assurance Leadership Competencies



Assurance Leadership Traits

- ☐ Authenticity and giving a damn
- ☐ Wanting the business to succeed and thrive
- ☐ Being a great sparring partner
- ☐ Using informal tools and connection to gain mindshare
- ☐ If you identify risks, then offer solutions / optionality



Trusted Partners



Poll 4:

We are giving away 3 copies of Brian's e-book. If you would like us to enter you in the draw – answer Yes!

- Yes
- No

Panel Q&A Session

Poll 5:

I am focused on enhancing my leadership skills.

- Agree
- Disagree
- Don't know