

HIRING TALENT



DECODING LEVELS OF WORK IN
THE BEHAVIORAL INTERVIEW

TOM FOSTER

Levels of Work

Excerpted from [*Hiring Talent*](#), Tom Foster, © 2013 – Foster Learning Corp

The biggest mistake most managers make is underestimating the level of work in the role.

Inside every task, there is a level of decision making and a level of problem solving. That level can be identified and measured. Before the right person can be selected for the role, the manager has to understand the level of work. Examine this list of construction tasks for a door and trim contractor.

1. Before noon today, measure and hang the door, nail the trim wood around the door.
2. Over the next four months, coordinate the measuring of the openings, the ordering of all the doors, the hanging of the doors, including the trim wood around all the doors and windows (60 doors, 120 windows) in this building as it is constructed.
3. Over the next year, create a system to estimate, schedule, order and stock the doors and trim wood required for all the projects (175 projects), receiving the stock only as needed for each project, but so we never run out.

Each of these task assignments requires a different level of decision making and problem solving. The level of work can be identified and measured.

Identifying the Level of Work

To identify the level of work in the list of tasks above, there are three sets of clues.

- Decisions. What are the decisions that have to be made, to effectively complete the task prior to the deadline?
- Problem solving. What are the problems that have to be solved, to effectively complete the task prior to the deadline?
- Time-span of the task. What is the length of time established to complete the task?

Decoding these clues is the first step to understanding the level of work. Identifying the level of work is the first step in *Hiring Talent*.

[Level V Roles](#)

[Level IV Roles](#)

[Level III Roles](#)

Why is Time-span Important?

What separates one person's ability to perform, from another? That is the central question in every interview. Paying close attention to the level of work in the role and matching a person's capability to do that work, can dramatically improve hiring decisions. Decision making and problem solving are clues, but Jaques found the key metric in measuring level of work was time-span.

Time-span is the length of time a person can effectively work, without direction, into the future, using their own discretionary judgment, to achieve a specific goal.

Take a deep breath and re-read the definition, because time-span capability is the critical difference between each candidate.

Drew's New Hire

Drew was beside himself. "I don't know why Ryan can't handle this job. We asked him all the questions in the interview. We were quite thorough. He knows the name of each piece of equipment. He can tell you exactly what it is used for and how it is used. To run the equipment, we even have trained technicians for him to manage."

"What's the problem?" I asked.

"All he has to do is keep the equipment busy. We have sales orders from the front office. All he has to do is look at the sales orders, translate those into work orders, make sure we have the right materials in stock and schedule the work on each machine."

"And?" I pressed.

"And that's where he stops. He can keep one or two machines busy, but we have fifteen machines and plenty of work for all of them."

"Who was the supervisor before Ryan got hired?"

"Oh, he was a good guy, kept the place humming. Got promoted to our other plant in Michigan," Drew explained.

"And there was no one else on the production crew that could take over?"

"No, a good technician doesn't necessarily make for a good supervisor. It's one thing to push out today's work. Totally different to make sure all the machines are scheduled for each shift for the next three weeks. Lots of moving parts."

"Can't you train someone?" I probed.

"It's not a matter of training," Drew shook his head. "Some people have it and some people don't."

"So, what is it, that some people have and others don't?" I wanted to know.

Capability is the Key

Each person is different. Each person has their own natural capability, embedded in their DNA. Fixed at birth, capability naturally grows as a person matures.

Given a task, a person applies their natural capability, along with skills and their interest in the work, to complete the task. Applied capability can be seen because there is a work product. A manager can see a person's applied capability by observing their work output.

It is the responsibility of every manager to determine the level of work in the open role and evaluate the candidate's time-span capability for that level of work. Matching the level of work in the role to the current capability of the candidate is the key to Hiring Talent.

Level I Roles

Level I roles are populated by technicians, equipment operators, clerical workers and data entry operators. The work product in Level I roles typically consists of *individual output*. The output from a Level I role is often the direct product or service experienced by the customer. Team members in Level I roles receive task assignments from a supervisor, coordinator or designated manager.

Claude's Team

I was talking with Claude, a supervisor, about his team. "Those two over there, are the new guys, one has been here a month, the other just got out of orientation last week. They are learning, but it will take them a while to catch on to how we do things around here."

"How often do you have to check up on them?" I asked.

"In the morning, we go over the work orders from the production schedules. A little huddle meeting. I check back in about 15 minutes to make sure they are

moving in the right direction. Then, they're good for a couple of hours. Right now, I am not as worried about their production output, as much as doing the work correctly."

"And the rest of your team?"

"The rest of the crew has been here at least a year, some, four or five years. They know what to do. For them, our morning huddle is as much social, as it is to look at production for the day. I walk the floor a couple of times, morning and afternoon, just to see if they have questions, admire some of their handiwork."

"When they run into a problem, how do they solve it?" I pressed.

"There are some things they can try, but if they can't figure it out pretty quickly, they either come to Tony, or me?" Claude replied.

"Tony?"

"Tony is the team leader. Sharp kid. Only been here two years, great technician, twenty-eight years old."

"So, how does Tony solve problems?" I was curious.

"Same as the other guys, but he is quick. If one solution doesn't work, he has something else to try. If that doesn't work, he tries something else. Boom, boom, boom, problem is usually solved. When I have to be out of the office, or on vacation, Tony is my assistant. I can leave him in charge, and not worry. But Tony won't be with us much longer."

"Why's that?"

"I was talking with my manager. She has had her eye on Tony since the beginning, thinks he is ready for supervisor training."

Decisions Made, Problems Solved

Most discretionary decisions in Level I roles revolve around pace and quality.

"Am I working fast enough to complete the assigned task in the time expected? Am I working carefully enough to meet the quality standard set for this task?"

Attention to quality standards translate into quality as a value-add at Level I. While companies may create those standards at Level III or Level IV, the delivery of quality standards into the product or service often rests in the hands of those in Level I roles.

Team members in Level I roles may work in the same room with other people, but are rarely concerned with other teammates' activities unless there are direct hand-offs of work tasks, one to another.

Work materials and equipment are organized only for the working session. Ordering and coordinating additional work materials for future work, next week, next month, is generally outside the bounds of Level I.

Time-span (1 day – 3 months)

Level I task assignments are generally expected to be completed within one day or a few days. Experienced team members may be expected to continue projects without supervision as long as a month. The most experienced team members in Level I roles may informally assist other team members in trial and error troubleshooting, demonstrate work routines or special skills and may be assigned projects as long as three months in length. Some organizations may call these most-experienced Level I roles *team leaders*. Team leaders may have no managerial authority but may assist their managers in task assignments between Level I and Level II roles.

Level I			
Longest Time-span Goals	Tools	Problem Solving	Value
1 Day-3 Months	Real tools, equipment, machinery	Trial and Error	Quality

Level II Roles

Level II roles are populated by supervisors, coordinators, first line managers and project managers.

Decisions Made, Problems Solved

The problems solved and decisions made are longer in time-span, than Level I roles.

Claude's Role

"So, your manager is sending Tony for supervisor training. What's different about a supervisor's role?"

"Well, since I am a supervisor, I can tell you first hand," Claude continued. "Each guy on the crew is focused on their individual task assignment. As a supervisor, I have to be focused on the whole team, how everybody and everything works together."

"You said Tony was pretty good at trouble-shooting. I assume you're pretty good at solving problems yourself?"

"I have a secret," Claude chuckled. "When these guys run up against a problem, they think it's the first time it has ever happened, so they try this or that to figure it out. You know, trial and error. Truth is, the problems our customers have, we have likely seen before. We document our 'best practice' solution to those problems in our SOP manual. For the most part, when I see a problem, I just have to identify its elements and look it up. Looking up the answer in the back of the book is a lot easier than starting from scratch. It's all about experience, tapping into that experience to solve problems."

"Kind of like watching a YouTube video on how to fix something," I smiled. "So, how do you keep everything straight?" I asked.

"At first, I tried to keep it in my head. Big mistake. Soon, I figured out some checklists we could use for different projects, so we wouldn't forget stuff. It makes a big difference when there are twenty-five things to remember. And schedules, I use a master schedule to coordinate people, materials and equipment, all in the right place, at the right time. The master schedule is one of my primary tools. With that, I can tell you what every day should look like for the next four weeks."

"So, you have to be able to look ahead for the next four weeks?"

"Oh, longer than that," Claude snapped back. "When I meet with my manager, we talk about things much further out. We have a seasonal business, so our workforce grows and shrinks each year. We can use a little overtime as a buffer, but I actually have a workforce plan that goes out one year. Recruiting and training doesn't happen overnight. We have to know when to begin hiring and when we have to move people around as the workload goes down. With the workforce plan, it's pretty predictable."

Team Coordination

Level II roles are concerned with the coordination of production with people, materials and equipment. It is a team orientation rather than an individual orientation.

Level II roles are accountable for materials in the current working session, as well as the ordering of future materials, for next week, next month. Level II roles may provide input on min/max quantities set by their manager.

To be effective, the tools in Level II roles consist of schedules, checklists and short meetings directly related to production or operational output.

Time-span (3 – 12 months)

Experienced Level II roles may be responsible for projects and operations three to six months in the future. The most experienced in Level II roles may be expected to work on projects up to 12 months in length.

Level II			
Longest Time-span Goals	Tools	Problem Solving	Value
3-12 Months	Schedules, checklists, meetings	Experience, manuals, best practices	Accurate, complete, on time

Level III Roles

Level III roles are populated by managers responsible for production consistency, to create predictability in work output. Their focus is on the creation, monitoring and improvement of systems. A system is a series of steps in a specific sequence that creates a predictable output.

Rachel's System

"I am not an industrial engineer," Rachel started, "but I know how to design a system. We are a large fast-food restaurant chain and each of our work cells is a small system. Cooking French fries is done according to a system, a series of steps in a specific sequence.

- Frozen potato slices are poured from a bag into a metal basket.
- The metal basket is submerged in cooking oil at a specific temperature.
- An automatic clock is tripped when the metal basket is submerged.
- The automatic clock rings an alert when the correct time has elapsed.
- The metal basket is removed from the cooking oil and set to drain for a specific period of time.

- The French fries are poured from the metal basket onto a heat tray ready for bagging.
- Salt is applied to French fries.
- French fries are bagged, to order, for the customer.

"When you watch it from the front of the store," Rachel continued, "it looks simple, but it took a full year to figure out all the elements, to fabricate the right basket and a timing system that could stand the heat near the fryer. Even the placement of the drain racking to minimize work steps had to be analyzed."

"What problems did you have to solve?" I asked.

"Oh, the problems were real," Rachel replied. "Why were the fries overcooked? How does cooking oil get splashed on the floor? Why are the fries oily?"

"So, you had to try some different things?" I quizzed, trying to sound smart.

"Well, trial and error sometimes works, but sometimes the solution requires analysis. When the fries were overcooked, it had nothing to do with the cooking time. Turns out, the cooking time was calibrated for frozen sliced potatoes. If the potatoes were allowed to thaw, they came out crunchy instead of crispy. It's a small thing, but the frozen state of the potato had to become part of the system."

"How about the cooking oil on the floor?" I wanted to know.

"That was a strange problem, because it didn't happen all the time. Just sometimes, there would be this unexplained cooking oil on the floor. We checked for leaks, but that wasn't it. We had to step back and examine the sequence. Sometimes, and only sometimes, the cook would put the fry basket empty into the cooking oil, then pour frozen potatoes directly into the cooking oil. A little dramatic, but there would be a flash boil that splashed grease onto the floor. So, the specific sequence of steps had to become part of the system. Put the potatoes in the basket, first."

"I have to close the loop on this," I said. "Sometimes the fries were oily?"

"It's the drain step. Fries only need to drain 20-30 seconds, but if the cook was in a hurry and bagged the fries immediately, they were greasy. We decided not to put a timer on that part of the system, it was more of a training problem. But that training step became part of the system.

"So, now you know, next time your fries are overcooked, it's a system problem."

Decisions Made, Problems Solved

Level III roles create sustainable efficiencies. The problems solved are related to work flow, system layout and sequence. Given a problem, the Level III manager examines the system. Designing, maintaining and troubleshooting systems may require root cause analysis or comparative analysis.

Time-span (1 – 2 years)

The time-span of the longest projects at Level III typically range from 1-2 years. To manage projects of this length, Level III roles depend on planning scenarios, employing "what if" analysis. In pursuit of any task assignment, they create alternate paths to the goal and contingency planning to anticipate roadblocks outside their direct control.

Here is another example of a Level III project with a time-span greater than one year, the installation of new piece of heavy, expensive capital equipment on a plant floor. Here is the system sequence.

- Evaluate the necessity for the capital equipment.
- Determine the current manual work cells that will be replaced by this equipment.
- Gather and evaluate proposals from different manufacturers.
- Reference-check current customers of this equipment from each manufacturer.
- Select a manufacturer.
- Negotiate the terms of the contract and delivery.
- Schedule the delivery.
- Lay out the plant floor to accommodate the new equipment.
- Construct a temporary work-around for the current manual work cells to be displaced by the new equipment.
- Jackhammer and reinforce the concrete floor to handle the weight of the new, heavy equipment.
- Take delivery of the new equipment.
- Install the new equipment.
- Troubleshoot why the new equipment doesn't work (new equipment never works).
- Fly in a team of engineers to get the new equipment working.
- Train personnel to operate the new equipment.
- Do first-piece inspections from the new equipment.
- Transition output from the manual work cells to be replaced by output from the new equipment.
- Discontinue output from the manual work cells, replace with total output from the new equipment.
- Ramp output from the new equipment to new, higher, output capacity.

Time-span of the task - 12 months.

Level III			
Longest Time-span Goals	Tools	Problem Solving	Value
1-2 Years	Flow charts, sequence, planning	Root cause analysis, comparative analysis	Single system efficiency, consistency, predictability

Level IV Roles

As organizations grow, they develop more systems and subsystems. Level IV roles are typically responsible to integrate these multiple systems together. But, this is not a multi-tasking role. Level IV managers must understand the dependencies, inter-dependencies, contingencies and bottlenecks that exist between multiple systems. The goal is to integrate these systems and subsystems together into a "whole system."

Decisions Made, Problems Solved

Level IV managers (typically a VP, COO, Director of Operations) have larger picture decisions to make.

- How does one system impact another system?
- Is it okay for one system to go idle while other systems catch up?
- Where is the constraint in overall throughput?

The focus in problem solving often requires the Level IV manager to step out of the internal focus of a single system to examine the output of multiple systems interacting with each other. This may involve the momentum of a *reinforcing* system offset by the impact of a *balancing* system.ⁱ

Sales, as a *reinforcing* system, are often offset by the capacity of operations, as a *balancing* system. Unrestrained sales that outstrip operational fulfillment create backorders and unhappy customers. Unrestrained operations that outstrip sales create inventory overstocks, carrying costs and cash flow issues. Matching sales (*reinforcing* system) with operational fulfillment (*balancing* system) creates a "whole system" optimized for organizational output.

Time-span (2-5 years)

Problem solving at Level IV is generally related to longer term initiatives which may take 2-5 years to achieve. Task assignments at Level IV are defined by operational planning and longer term strategic planning.

Level IV			
Longest Time-span Goals	Tools	Problem Solving	Value
2-5 Years	System metrics	Systems Analysis	Multi-system efficiency, "whole system" throughput

Level V Roles

Level V roles are populated by business unit presidents and small company CEOs. Their attention must be broad, accounting for the organization's strategic vision against the realities of the market.

Decisions Made, Problems Solved

These are often the only roles in the organization with the authority to make decisions about long term commitments of resources for facilities, capital equipment, including the collateralization of lines of credit. Level V roles use financial metrics and models to make long term decisions and commitments to ensure that the organization stays relevant and viable in the marketplace.

Time-span (5-10 years)

The long term view at this level ranges from five to ten years. These roles watch long term market trends, think about mergers and acquisitions, geographic expansion and product line extensions. They position resources and take long term risk.

Levels of Work				
Level	Longest Time-span Goals	Tools	Problem Solving	Value
Level V	5-10 Years	Financial models, market studies	External Analysis	Value in the marketplace
Level IV	2-5 Years	System metrics	Systems Analysis	Multi-system efficiency, throughput

Level III	1-2 Years	Flow charts, sequence, planning	Root cause analysis, comparative analysis	Single system efficiency, consistency, predictability
Level II	3-12 Months	Schedules, checklists, meetings	Experience, manuals, best practices	Accurate, complete, on time
Level I	1 Day-3 Months	Real tools, equipment	Trial and Error	Quality

Levels of Work in Different Disciplines

Examples of level of work in physical trades, construction and manufacturing are easiest to identify. Other disciplines, including service work and knowledge work can also be calibrated by identifying decisions made, problems solved and the length of the longest time-span task in the role.

Managerial Roles

Level I – Time-span (1 day – 3 months)

There are no managerial roles at Level I. The work in most Level I roles is described as individual direct output.

Level II – Time-span (3 – 12 months)

Coordinators, supervisors, project managers, first line managers, assistant managers all populate Level II roles. The purpose of these roles is to make sure the production work at Level I is completed on time and within the specifications of the output.

Level III – Time-span (1 – 2 years)

Managers at Level III are accountable for the creation of sustainable production systems. These systems must be constructed to anticipate fluctuations in

production volume as well as variance in materials, equipment, and customer specifications.

Level IV – Time-span (2-5 years)

Managers at Level IV are accountable for multi-system and sub-system integration. Problem solving at this level is more complex, troubleshooting a system problem that may actually be caused by its interaction with another system inside or outside the organization.

Level V – Time-span (5-10 years)

The managerial role at Level V is most often the business unit president. This role is typically the only role that can make signature commitments to building leases, long term capital equipment, lines of credit, mergers and acquisitions. The business unit president must ensure that the strategy of the organization is relevant to the market it serves. In the following discussion of individual business models, each model will typically have a business unit president or chief executive.

Level VI – Time-span (10-20 years)

This role emerges as an organization grows to hold multiple business units in its portfolio. Much of the work at this level is to make decisions about the long term viability and growth of its individual business units. Capital investment, return on equity and market opportunity make up the day-to-day issues in this role.

Accounting Roles

Level I – Time-span (1 day – 3 months)

Accounts Payable, Accounts Receivable and other clerical roles are typically high Level I roles. Much of this work is transaction based, including computer data entry and reconciliation routines.

Level II – Time-span (3 – 12 months)

Accounting roles at Level II typically require the compilation of source data for activities like payroll reporting, quarterly payroll reconciliations and insurance census reporting.

Level III – Time-span (1 – 2 years)

Accounting system Level III work is typified by full charge bookkeeping, trial balance proofing, monthly, quarterly and annual financial statement reporting. Even though some reporting appears to be monthly or quarterly, these Level III roles simultaneously consider the impact of those monthly and quarterly numbers on the annual compilations, extending the time-span of the task to one year.

High Level III roles are populated by controllers, which would include project accounting or job cost accounting where accounting periods may extend beyond a single fiscal year.

Level IV – Time-span (2 – 5 years)

CFO roles require the anticipation of fiscal events more than two years out. This would include negotiation for and maintenance of lines of credit, covenant reporting to banks and market trend analysis that impacts cash requirements. In an integrator role, the CFO inspects system metrics to evaluate the performance of multiple systems working together for total organizational financial performance.

Engineering Roles

Level I – Time-span (1 day – 3 months)

There are few engineering roles at Level I. Internships and other learning roles in engineering require high Level I, in some cases, Level II capability.

Level II – Time-span (3 – 12 months)

Most engineering production work is completed at Level II. In many cases, these roles are non-managerial, individual technical contributors. This would include engineering output in the form of CAD/CAM, blueprints and other engineering drawings. This work consists of selecting and compiling project elements in a technical drawing or technical model.

Outside of drawing work, Level II roles would be populated by sustaining engineers, manufacturing engineers, production engineers, whose work would include engineering problem solving in a production environment where problems require more than trial and error solutions, adhering to standardized practices create at Level III.

Level III – Time-span (1 – 2 years)

Some engineering work is system specific, requiring higher levels of capability. Here, there are specialized hydraulic, mechanical, chemical and electrical engineers. The work at this level is more complex than bringing known elements into a drawing. This design work involves problem solving of unknown elements inside an unknown system. The task assignment may be to create a machine, tool or system that functions within a specified tolerance according to an engineering discipline. This role may be non-managerial, as an individual technical contributor, or managerial coordinating the output of Level II engineers.

Level IV – Time-span (2-5 years)

Engineering work at this level would involve the integration of multiple disciplines. Some engineering problems require the integration of hydraulic, mechanical, chemical and electrical disciplines. This role may be non-managerial, as an individual technical contributor, but more likely will be managerial, coordinating the output of Level III engineers.

Computer Programming Roles

Level I – Time-span (1 day – 3 months)

There are few computer programming roles at Level I outside of interns or learning roles.

Level II – Time-span (3 – 12 months)

Computer programming at Level II involves the creation of functional routines or small applications that perform simple calculations or queries. Coding work at Level II would most likely be under the direct supervision of a programming manager.

Level III – Time-span (1 – 2 years)

Programming work at Level III would include the creation of full system applications or an application module. Level III roles may delegate some of the coding activity to Level II under programming guidelines and specifications created at Level III.

Level IV – Time-span (2-5 years)

Programming work at Level IV would include the integration of full system applications into enterprise systems, containing multiple modules. Much of the coding work would be completed at Level II and Level III under the direction and guidance of Level IV roles.

Sales Roles

Level I – Time-span (1 day – 3 months)

The level of work in sales roles can be calibrated by inspecting the length of the sales cycle. Short sales cycles can be effectively maintained by trained order takers. Level I sales roles can be found in catalogue call centers, counter sales and sales oriented customer service centers.

Level II – Time-span (3 – 12 months)

Sales work at Level II is found in longer sales cycle projects, where building relationships is important. This sales work consists of prospecting for new customers, qualifying prospective customers, gathering customer needs according to a checklist, matching products to customer needs, making

presentations, negotiating and closing the sale. On the customer side, the counterpart to Level II sales work would be the purchasing agent.

Level III – Time-span (1 – 2 years)

Decisions in business to business purchases often require additional input. While the buying criteria for most purchasing agents is price, the Level III buyer, sometimes a specifying engineer, is more concerned about function. Interacting with a Level III buyer may require the capability of a Level III sales person, a product engineer. Sales work at this level is more concerned with needs analysis, product match and application. Sales functions like prospecting may be delegated to sales team members at Level II.

Level IV – Time-span (2-5 years)

Occasionally the buying decision involves product functionality that integrates with other systems that exist in the customer organization. The Level II purchasing agent is concerned about price. The Level III specifying engineer is concerned about function. The Level IV buyer is concerned about how the product or service will integrate with other systems in the company. Sales cycles greater than two years may require Level IV capability to understand the complexities of how the product or service integrates into customer systems. A primary accountability for this level of work in the selling company will be feedback loops into research and product or service development. Examples of Level IV sales roles exist in pharmaceuticals, automobile components, electronic components, large scale construction projects, international logistics, financial instruments and insurance products.

Restaurant Business Models

Level I – Time-span (1 day – 3 months)

Cooks, servers, greeters and bartenders make up Level I roles in this business model. Individual direct output describes the work.

This industry has created stop-gap roles at Level I, which appear to be managerial, such as shift supervisor and manager of the day (MOD). Close inspection of the time-span in these roles is required to determine if the decisions are stop-gap at Level I or managerial at Level II. Stop-gap decisions are temporary decisions made in the absence of a manager. The stop-gap authority of a shift supervisor or manager of the day (MOD) is limited to low risk decisions within the level of work in the role.

Level II – Time-span (3 – 12 months)

The manager in a single store restaurant is often a Level II role. The work is intense, but the time-span of tasks like recruiting and food purchasing fall within

a one-year time frame. A store manager in a multi-store restaurant chain follows system specifications and direction from roles at Level III or Level IV.

Level III – Time-span (1 – 2 years)

In a single store restaurant, this role is often the owner, who had a great idea for a restaurant. This level of work includes restaurant theme, menu creation, commitment of resources to multi-year leases.

Manager roles in upscale and large multi-store restaurants may require Level III work. A chef's role in an upscale restaurant involves much more than cooking, in the creation of food themes, recipes, hardware inventory, capital equipment purchases and kitchen workflow. Level III roles would include workforce planning, training programs and store profitability.

Level IV – Time-span (2-5 years)

This level of work in the restaurant business model is mostly found in multi-store operations. Contracts with food purveyors include details that integrate into the systems at each of the store locations with budget items for advertising, media buys and branding. Capital requirements extend beyond operational expenses into real estate investment, expansion and franchise agreements.

Fleet Service Business Models

Level I – Time-span (1 day – 3 months)

Service technicians populate Level I roles in this service model, extending to dispatch operators and customer service personnel. Many fleet service models are based on simple service functions with perceived complexity or requiring specialized equipment. This includes plumbing, air conditioning and carpet cleaning technicians.

Level II – Time-span (3 – 12 months)

Fleet service technicians in Level I roles require coordination and scheduling functions contained in Level II roles. Supervisors and manager-of-the-day (MOD) roles ensure that service delivery will meet standards, be complete and on-time.

Level III – Time-span (1 – 2 years)

To be efficient in its service delivery, fleet service companies employ managers to create, monitor and improve systems. Recruiting and training to these systems are necessary to establish branded processes in these moderate to high turnover businesses. Fleet service models spawn franchise operations. Franchisees

purchase proven Level III systems from franchisors, reducing the number of roles needed at Level III in franchise stores.

Level IV – Time-span (2-5 years)

Multi-store operations may require capability at Level IV as issues of fleet leasing, volume equipment purchases, uniform contracts, legal exposure and insurance become more complex with a larger employee base.

Creative Agency Business Models

Level I – Time-span (1 day – 3 months)

This business model includes advertising agencies and media production companies. In addition to Level I clerical roles, many creative roles are found at Level I, including graphic artists, layout designers and production technicians. Much of their work consists of task assignments assigned by Level II or Level III project managers or department managers.

Level II – Time-span (3 – 12 months)

Project coordinator or project manager roles organize project work into discrete task assignments, ensuring compliance with project specifications, meeting customer approvals and project deadlines. These roles interface in working relationships with account managers also at Level II. Account management maintains the working relationship with the customer, looking at longer time-span tasks related to overall campaign work or project initiatives.

Level III – Time-span (1 – 2 years)

To be efficient and profitable, agencies and media companies must develop systems so that creative work can be organized within budgets on a repeated basis. The output at Level III would include work flow charts, step-by-step quality approvals and media specification standards, all to ensure that the creative work is consistent in its quality and that first time customers become repeat customers. Effectiveness at Level III can be seen by those agencies who have a stable client base with little turnover.

Level IV – Time-span (2-5 years)

Level IV expertise is required by larger agencies and media companies involved in cross platform media buys, integrated lead generation systems and where fast-response systems must be constructed and integrated. Level IV roles may be involved in the acquisition and deployment of software to create customized cross-platform media pieces based on database variables generated in real time. The observed work output may occur in real time, but the acquisition and deployment of those systems may take more than two years to become reliably productive.

Financial Planning Service Models

Level I – Time-span (1 day – 3 months)

Financial service models, like financial planning, involve work roles across all levels. Most Level I work is clerical in nature. Because of the risk and legal exposure, much of this clerical work is boilerplate, using templates created at Level III and Level IV.

Level II – Time-span (3 – 12 months)

A large part of financial planning service models is in sales and customer relationship building. Entry level sales roles involve Level II work following checklists and compiling customer data in relatively simple financial programs and products.

Level III – Time-span (1 – 2 years)

As customer requirements become more complex, the work requires analysis and the ability to project further into the future. More complex financial products are not suitable for all customers, requiring additional analysis from roles at Level III. These Level III roles may still be involved in direct sales efforts, but with additional qualifying steps to identify the more complex customer.

Level IV – Time-span (2-5 years)

Financial service sales at Level IV are more technical in nature, looking at issues larger than principal preservation and growth. There may be tax implications, inheritance issues, gifting issues, generation skipping, estate and trust work. While the mechanics of these issues may be delegated to Level III or Level II roles, the customer relationship and strategy requires capability at Level IV.

Insurance Agency Business Models

Level I – Time-span (1 day – 3 months)

Like financial services work, insurance agency models require clerical work, much of which is boilerplate and pro-forma.

Level II – Time-span (3 – 12 months)

Level II roles in this model would include entry level sales personnel, involved in the sale of standard insurance products. While the products are standard, significant compilation of customer data is required to qualify the customer and determine rate information. This customer data must be complete, accurate and within specific time deadlines to comply with renewal periods.

The backside of insurance product sales requires Level II roles involved in marketing those qualified customers to underwriters, maintaining underwriting relationships and adjusting policy parameters to fit the customer needs. Claims management is also populated by Level II roles to ensure that claims are documented to standard and filed appropriately.

Level III – Time-span (1 – 2 years)

Some customer insurance requirements are more complex, requiring risk management analysis supported by insurance products. Sales roles at Level III must have the ability to analyze customer systems for risk, determine exposure bases and execute mitigating programs like safety training to impact risk exposure.

Level IV – Time-span (2-5 years)

Large customers may require integrated risk management solutions that require Level IV roles to assess and manage large risk pools. This may involve specialized re-insurance resources, self-insurance entities and legal corporate structures to protect assets. Sales roles at Level IV are looking for complex customers with complex risk management issues.

Construction Trades

Level I – Time-span (1 day – 3 months)

Construction trades have a wide range of Level I roles, from direct laborers to team leaders. Direct laborers work on time-span tasks from one day to one week. The most experienced laborer on a work crew may have a designated role as team leader. Team leader work remains at Level I, where this person may answer questions, model the correct work method, but without the responsibility of assigning tasks to other crew members. On occasion, a team leader may assist a supervisor or foreman, but is not accountable for scheduling, re-scheduling or authorizing overtime.

Level II – Time-span (3 – 12 months)

Level II roles would be populated by supervisors and foreman. Accountability would include the coordination and scheduling of personnel, equipment and materials. On a job site, they likely retain the highest decision making authority. This role often has wide latitude in day-to-day decision making within limits set by their manager. At a project level, they have non-managerial working relationships with project managers.

Project management is typically a Level II role, focused on planning and project administration. Project managers have non-managerial working relationships with superintendents, construction managers, supervisors and foremen.

Level III – Time-span (1 – 2 years)

Level III roles include construction managers and superintendents. They often have accountability over several job sites, responsible for master scheduling, work force loading and large equipment mobilization. Construction managers have non-managerial working relationships with project managers.

There are project manager roles at Level III, sometimes designated as senior project manager. This level of work is distinguished by project time-spans exceeding one year, but, less than two years in length.

Level IV – Time-span (2-5 years)

Level IV roles include C-level, Chief Operating Officers and Vice-Presidents. These roles may not be required for small sub-contractors, but are necessary in large organizations, prime contractors and general contractors. Large projects that extend beyond two years require management capability to coordinate multiple sub-contractors, complex project tracking and project budgets.

Legal Business Models

Level I – Time-span (1 day – 3 months)

With the advent of computers and electronic communication, the need for clerical roles in legal firms has diminished, but there are still large amounts of paper documents that must be created, copied and filed.

Level II – Time-span (3 – 12 months)

Roles at Level II include para-professionals, research assistants and junior attorneys. They compile the legal elements that make up real estate contracts, supporting documentation, business contracts and routine agreements. In simple matters, they operate independently. In complex projects, they operate under the direction of another attorney or specialist.

Level III – Time-span (1 – 2 years)

Most legal work is performed by attorneys in roles at Level III. While many tasks appear to be short in time-span, the impact of a decision, contract or agreement may extend well into the future.

Level IV – Time-span (2-5 years)

Legal work seems important, because its impact is long-lasting. Lease agreements may last five years. Settlement agreements may last a lifetime. The longer the impact of a legal agreement on an individual or company, the greater the uncertainty. Negotiating and writing a settlement agreement requires the imagination to predict relevant events in the future that might have impact on the parties involved. Legal roles at Level IV include senior attorneys and specialists.

Public Accounting Business Models

Level I – Time-span (1 day – 3 months)

Like legal work, Level I roles in public accounting firms have been minimized by computerization. Computer systems have replaced manual systems. Computerized bookkeeping systems have migrated from the public accounting firm to the offices of their clients. Payroll returns are no longer prepared by the accounting firm, but by large payroll processing companies. Even receptionists have been largely replaced by voicemail. Clerical roles at Level I have not disappeared, but many of those desks are now empty.

Level II – Time-span (3 – 12 months)

Computers have had an impact on Level II and Level III work as well. Because most accounting work is governed by a complex set of rules and guidelines, computer software has been written to remove much of the decision making surrounding the treatment of an accounting or tax issue. Level III or Level IV decision making has been replaced by computer software operated by accounting roles at Level II.

A client may be greeted by and have coffee with the senior partner in the public accounting firm, but the work is compiled by an accountant in a Level II role.

Level III – Time-span (1 – 2 years)

Computers do not make decisions, they do not reason, but follow precise rules created by the software programmer. While most accounting and tax issues are strictly governed by rules, there are many areas where judgment is required. An accountant in a Level III role may consider several ways for a company to account for depreciated equipment or to handle its inventory method. Decisions must account for company objectives related to cash flow or tax treatment. These decisions cannot be made by a computer, but require analysis and judgment at Level III.

Level IV – Time-span (2-5 years)

While computer software can accurately calculate tax returns, there are some accounting issues that require judgment on issues that extend beyond two years. Accounting roles at Level IV would be involved in decisions surrounding trusts, estates, separating or merging corporate entities. The role may still be called accountant, but the capability required for this work extends from two to five years.

Medical Business Models

Level I – Time-span (1 day – 3 months)

Technology has helped create many Level I roles in the medical industry. Sophisticated medical machines require technicians and operators. Nursing assistants can handle many of the routine tasks that formerly required higher level skills and experience.

Computers have created the ability to record volumes of patient medical data. Many administrative roles are now required to record medical conditions and test results into computer software.

Level II – Time-span (3 – 12 months)

The difference between a nursing assistant in a Level I role and a registered nurse in a Level II role is in the decisions that are made. A nursing assistant at Level I is accountable for administering drugs according to the specification on a patient chart. A registered nurse in a Level II role is more likely to catch the mistake of a drug label attached to the wrong patient chart. It is not just a matter of more experience or training, but a higher level of judgment in making decisions.

The emerging role of the physician assistant at Level II, in the delivery of medical services, will be interesting to watch as technology allows for remote supervision by Level III and Level IV physicians.

Level III – Time-span (1 – 2 years)

Level III medical roles are populated by general physicians, internists and some specialists. The time-span of the patient's disease would indicate the level of work required in the physician role.

Level IV – Time-span (2-5 years)

Long term diseases may require the physician, specialist or surgeon to integrate research, complex symptoms and patient response to treatment. Disease management across populations for the practical elimination of polio, tuberculosis and smallpox likely required Level IV roles. Future disease management for cancer, diabetes and immune disorders will require roles matched to the time-span of those conditions.

Education Models (K-12)

Level I – Time-span (1 day – 3 months)

Clues to the level of work in roles for education, both public and private, can be seen in student-teacher interaction combined with lesson planning. Most Level I teaching is performed by student teachers and teacher's aides. Often, they will be assigned to work one-on-one or with very small groups to achieve learning objectives. Lesson planning is short term or non-existent. Most often, Level I teaching is closely supervised by other teachers at Level II or Level III.

Level II – Time-span (3 – 12 months)

Most classroom teaching roles are at Level II. Lesson planning is mandated by administration and usually extends only to the end of the scholastic term. Learning methodology is primarily the presentation of reading material or other media about a defined subject area, accompanied by a test for comprehension.

Math skills begin with kinesthetic manipulation of objects and progress to memorization of addition and multiplication tables.

Level III – Time-span (1 – 2 years)

The difference between a Level II classroom teacher and a Level III classroom teacher may first be observed in their lesson planning. The output of Level III planning extends beyond the mandated scholastic term to full year or multi-year outcomes. Level III teaching roles sit on curriculum committees and contribute to the long term culture of the school environment.

Level III roles are also populated by principals at smaller schools. Accountable for the smooth operation of smaller schools, these principals must design the system in which each school operates in concert with teachers, students and parents.

Level IV – Time-span (2-5 years)

Larger schools are more complex, with bigger student populations, more teachers, higher public visibility, more internal and external programs. The level of work in the role of the principal moves to Level IV. It is likely that this principal

sits on school district policy committees, manages a complex budget and directs the day-to-day operation with the help of an assistant principal at Level III.

It's All About the Work

The biggest mistake most managers make is underestimating the level of work in the role. Identifying the level of work is the key to effective hiring decisions. Failing to accurately identify the level of work will guarantee hiring the wrong person. Matching the level of work with the capability of the candidate is the first requirement in the selection process. It is one of four absolutes.

The Four Absolutes

With the level of work identified, the focus shifts to find the most effective candidate. According to Jaques, in the hiring process, there are four key elements to be discovered about each candidate.

1. Capability – matched to the level of work in the open role.
2. Skill – technical knowledge and practice related to the open role.
3. Interest, passion – value for the work in the open role.
4. Reasonable behavior – connected to the open role.

These are absolutes. Any one of these four elements can disqualify the candidate.

Four Absolutes for Effectiveness	
Capability	Skill
Interest Passion	Reasonable Behavior

Capability - How Big Is the Role?

Most discussions of capability use analogies and imprecise descriptions.

- How big is the role?
- How heavy is the role?
- How much horsepower does this role require?

These descriptions make for colorful conversation, but are not helpful to specifically define and measure capability required in the role.

Connecting Time-span with Capability

Decisions and problem solving are clues to level of work, but the most accurate measure of level of work is time-span. This definition is worth repeating.

Time-span is the length of time a person can effectively work, without direction, into the future, using their own discretionary judgment, to achieve a specific goal.

It's All About the Work

Armed with the level of work, the interviewer only has to learn if any of the candidate's former roles match the level of work required in the open role? How effective was their decision making? How effective was their problem solving? How effective was the candidate in that level of work?

With an understanding of levels of work, these are the two central questions.

- What is the level of work in the open role?
- Does the applied capability of the person match the level of work?

Skill

The second absolute for success, in any role, is skill. The candidate may have the capability to handle the level of work in the role, but if they do not possess the specific skills required, the manager may not see that capability.

A skill can be learned, and contains two elements, technical knowledge and practice.

If the skill is to throw a ball, there is some technical knowledge required. Does the ball have seams? Is the ball round or oblong? Are fingers placed around the ball, or inside the ball? Is the ball thrown underhand or overhand? What sport is the ball used in?

But, technical knowledge has little bearing on the success at executing the skill. Much may be known about the ball, but to master execution, practice is required. Skill requires both technical knowledge and practice.

Interest, Passion (Value for the Work)

A candidate may have the capability and they may have the skill, but it matters little if there is no interest or passion for the work. If a person places a high value on the work, they are likely to have interest or passion for the work. If a person places a low value on the work, they are likely not to be interested.

Reasonable Behavior

Reasonable behavior sounds unremarkable, but, as one of the four absolutes, it can derail a candidate's effectiveness. Reasonable behavior has two parts, one positive, one with a dark side.

- Habits
- Absence of an extreme negative temperament

Habits

There are habits which contribute to success and habits that get in the way. If timeliness is a critical role requirement, then showing up early might be a positive habit, showing up late, a negative habit. Often, ingrained habits have a profound impact on effectiveness.

Absence of an Extreme Negative Temperament

This is the dark side of reasonable behavior. Jaques described this dark side as minus "T". The "T" stands for temperament. Related to temperament, Jaques was mainly concerned only with the extreme negative temperament or minus "T," the baggage that some people carry that gets in the way of their effectiveness. This is conduct clearly outside the bounds of reasonable behavior.

Minus "T"

Here is a short list of behaviors in the category of minus "T."

- Arrogant
- Self-Absorbed
- Perfectionist
- Micro-manager
- Defensive
- Control Freak
- Stubborn

- Pig Headed
- Abrasive
- Rude

So, reasonable behavior is required, positive habits that contribute to effectiveness, and the absence of Minus "T."

Most Interviews are Too Narrow

Unfortunately, most interviews are solely conducted for technical knowledge, one small slice of the four absolutes. If a candidate scores well on technical knowledge, wild assumptions get made about the other absolutes. To make an effective candidate selection, interview questions must be crafted for all four elements.

Most Hiring Processes are Too Loose

Most companies have a very loose process for hiring. They solicit resumes, schedule some interviews and then pick somebody.

Hiring Talent is serious business. Look at the annual compensation package, then double or triple that amount to figure what a poor hire will cost the company in terms of wasted compensation, re-work and overwork on the part of others covering for the poor hire. Look at the impact on morale and unproductive management time.

Hiring Talent requires discipline in a core set of specifically defined steps.

- Organize the role description (Part I)
- Assemble a bank of interview questions (Part II)
- Conduct effective face-to-face interviews (Part III)

Each step in the hiring process exists for a very specific reason.

ⁱ Peter Senge, *The Fifth Discipline*. 1990. Currency Doubleday, p 79.

Excerpted from [*Hiring Talent*](#), Tom Foster, © 2013 – Foster Learning Corp