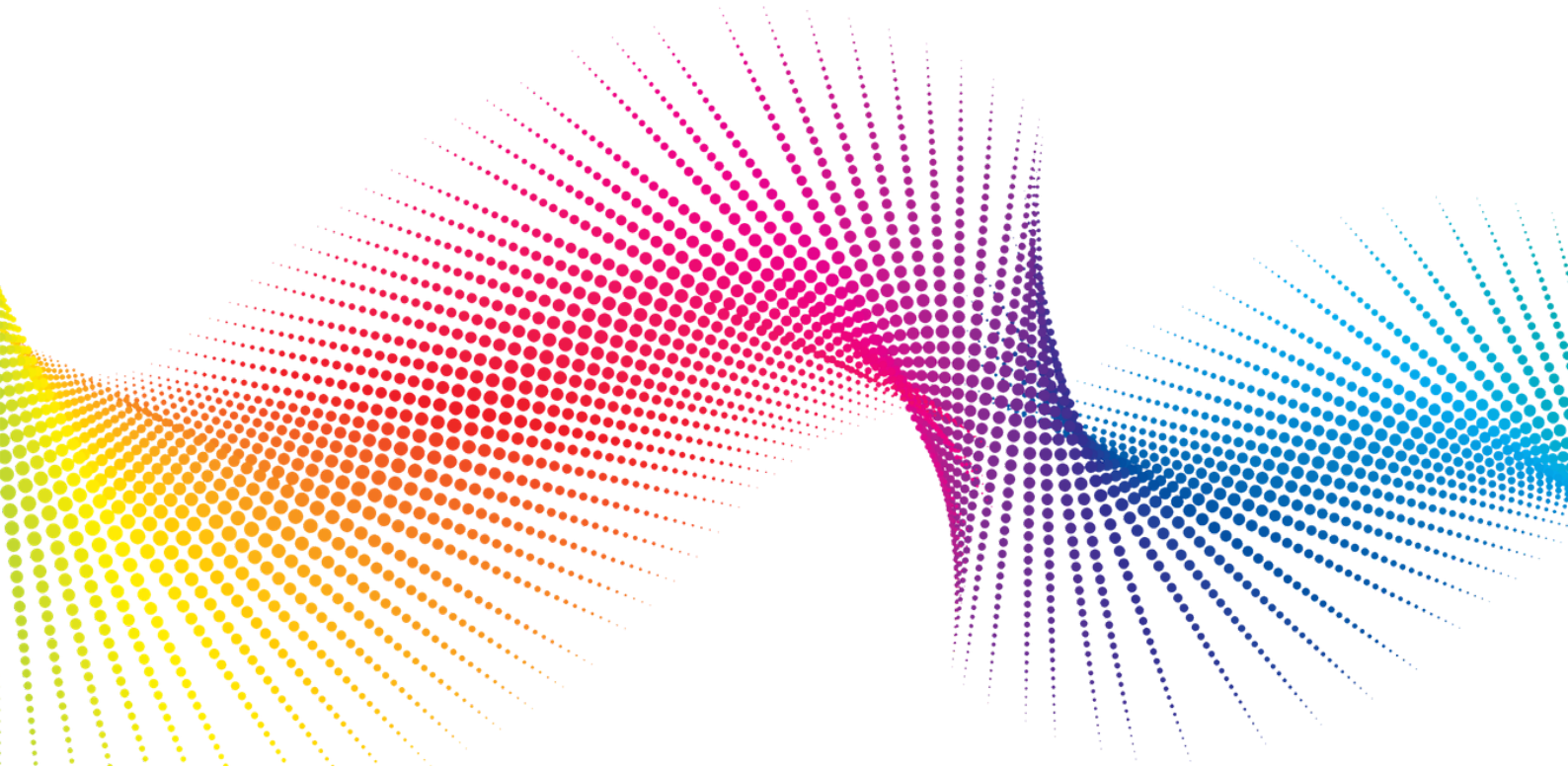
ENTERPRISE MANAGEMENT LTD.

Situational Mindsets Indicator™ Report

Sample

Tuesday, May 26, 2025



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Part 1: Your Scores

	INVENTING	CATALYZING	DEVELOPING	PERFORMING	PROTECTING	CHALLENGING
SCORE	12	10	0	0	6	14

Your score reflects the critical Mindsets for your selected initiative or situation. It highlights the driving lens you currently use to set goals, make decisions, and allocate resources in your selected situation. Your score reflects what you are focusing on in the selected initiative, and it also reveals the Mindsets that are less critical to you. Low or zero scores may indicate that you have determined that a Mindset focus has been fully satisfied or it may indicate a need to investigate the Mindset areas more carefully to ensure that important information has not been overlooked.

Recognizing Mindsets helps leaders at all levels identify the goals, actions, and results that take precedence. Mindsets change with new information and new circumstances.

Mindsets are not a personal characteristic, interpersonal style, or a measure of IQ. Everyone despite characteristic or style will choose to leave a burning building. Facts and circumstances dictate decisions.

Research indicates that 45% of responders employ one Mindset, 31% use two Mindsets, and 22% currently operate with three Mindsets for their selected situation.

Part 2: Analysis

Leadership has been studied for centuries, and the definitions continue to evolve as requirements change. The definition used in Situational Mindsets Indicator® for successful goal setting is: "The ability to make wise decisions or judgments that balance short-term and long-term priorities and the ability to influence others to achieve results."

All of the Mindsets add value since they are an objective assessment of organizational opportunities, and risks. Goals, plans, and actions must shift as events warrant requiring leadership agility. There are six mindsets with different priorities. Establishing the best balance between these factors requires wisely weighing challenges given current conditions. The six Mindsets are:



Mindset	Goal	Desired Results
Inventing	"Innovate and first to market."	Develop new ideas, products and services.
Catalyzing	"Grow! Customer Service."	Gain market share, serve customers.
Developing	"Establish order for sustained excellence."	Build infrastructure, create policies and systems.
Performing	"Maximize quality and return!"	Streamline processes, build the bottom line.
Protecting	"Maintain culture, traditions and talent."	Develop worker capabilities, support culture.
Challenging	"Seize opportunities and position for the future."	Test assumptions, create strategic options, adjust business plan.

We need to continually pay attention to changing circumstances and consider all Mindsets to ensure that we avoid blunders that invite risk.

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Your Challenging Mindset Analysis

Overview:



Question assumptions and practices in order to surface issues and ensure a strategic perspective. Focus on emerging needs and future opportunities. Introduce the need for change, risk, and flexibility.

Primary Focus:

The Challenging Mindset Priority welcomes risk and change as an opportunity to examine assumptions, reposition strategy, and discover new opportunities. Questioning accepted practices and assumptions, this Mindset encourages others to examine new opportunities and learn from experience. It raises issues and opportunities that might be missed amid the press of daily operations. Concerned that complacency might limit thinking, the Challenging Mindset uses emerging trends, and opportunities to reassess goals and direction.

The Mindset Adds Value by:

Recognizing emerging trends and the need to balance short- and long-term goals. Sensing stagnation, this Mindset encourages others to adopt change. The Challenger Mindset Priority accepts paradoxes, ambiguity, and risk-taking for long-term success. Concerned that blind spots or narrow perspectives may limit opportunities, it seeks diverse viewpoints to identify trends and prepare the enterprise for the future.

Driving Questions for the Challenging Mindset are:

1. What assumptions may no longer be valid? Are we resting on our reputation?
2. What non-traditional threats could arise?
3. How can we more effectively balance short- and long-term goals?
4. What new business model is possible?
5. How can we address our weaknesses?
6. What would we do differently if we had a blank slate?

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7. How can technology help us?
8. What are the emerging customer trends?
9. Are there symptoms of "group think?"
10. Are we effectively learning from our experience?

Your Inventing Mindset Analysis

Overview:



Create new products or services, apply technology in innovative ways, and spot synergies.

Primary Focus:

An Inventing Mindset Priority offers suggestions, recommendations, and new ideas. Convinced that change and risk are necessary to remain viable in the marketplace, the Inventing Mindset stresses the need for innovation. The Inventing Mindset either develops new ideas or synthesizes existing concepts to bring an enterprise into existence or to revitalize it. The Inventing Mindset emphasizes the uniqueness of a proposal to gain acceptance. Committed to the value of new ideas, This Mindset builds an environment for exploring alternatives and new options. It also identifies potential new organizational synergies.

The Mindset Adds Value by:

The Inventing Mindset encourages others to think beyond existing products or services, welcomes new ideas, and encourages reasonable risk taking. Stressing the need to "think outside of the box" to uncover ways to use existing resources more effectively, identifying innovative solutions to difficult issues, proposing ways to overcome barriers, synthesizing operations effectively, and employing creative thinking to meet challenges and opportunities.

Driving Questions for the Inventing Mindset are:

1. How can we encourage "out of the box" thinking?
2. What alternatives are there?
3. What new integrations can be introduced across functions, disciplines, product lines, or service offerings?
4. What can we do differently?
5. If there were no constraints, what could we do?
6. What is the ideal product or service?
7. How can we take our existing processes/methods to a new level?
8. What insights might surface by seeking the opposite results?

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9. What has never been tried before?
10. What have we given up on in the past that might be viable now?
11. What technologies can we leverage?

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Potential Risks and Blind Spots

The Challenging Mindset Priority may introduce change too rapidly or may not gain the necessary support for successful implementation. Effective execution planning may be overlooked based on the assumption that everyone understands what to do and is fully committed to the goal. This Mindset may not sufficiently value tradition, community, or allocate sufficient time and resources for change. In addition, targeting potential future opportunities may not be feasible within the enterprise's existing capabilities and talents.

To validate your current Mindset Priority determine whether you have adequately considered the Developing Mindset questions which are opposite to the Challenging Mindset frame of reference. These questions may add a new perspective or uncover potential risks.

1. What is the operational plan?
2. What is the best way to organize?
3. What are the key roles and responsibilities?
4. How should information flow?
5. What policy or systems are necessary to achieve our goals?
6. What results can we expect?
7. How and who will monitor progress?
8. What types of teams are needed?
9. What resources are required?
10. What will increase collaboration?

An Inventing Mindset Priority may develop ideas that do not meet current market needs, do not support key customers, cannot be implemented with existing resources, or require new distribution channels. The Inventing Mindset's recommendations may be too extravagant or not meet quality standards. This Mindset may underestimate the efforts necessary for implementation and production. The Inventing Mindset may also shift attention to other new initiatives too quickly or become too enamored with an idea and refuse to design it to meet expected requirements.

To validate your current Mindset Priority check whether you have adequately considered the Performing Mindset questions. These questions may add a new perspective or uncover potential risks.

1. What is the cost-benefit analysis?
2. What barriers and issues exist?

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3. What is the budget?
4. What are the milestones?
5. Are our processes efficient?
6. How can we improve our processes?
7. How can we reduce costs?
8. What are the best performance measures?
9. What will improve quality?
10. How can we improve results? What analysis is needed?
11. Where can we leverage our resources more effectively?

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Part 3: Effective Communication Strategy Using Mindsets

Effective communication flows from another receiving the message you intend to send. Therefore, it is necessary to detect and understand the Mindsets that others are using. The value of recognizing your audience's priorities is captured in the phrase "a penny for your thoughts." Realizing a person's current Mindset identifies their current goal focus. Understanding their desired outcomes enables you to explore win-win opportunities.

When communication starts by addressing our current areas of interest or Mindset, there is increased comfort, engagement and commitment to the conversation. Fans supporting a team at a sporting event or those caught in a snow storm bond because they have common goals. They unite across demographic classifications for a shared outcome. Gaining agreement requires that you understand how your current Mindset impacts communication and how to influence those with a different Mindset.

Challenging and Inventing Communication and Influence in Action

Your Current Challenging Communication Interests include:

Preferred areas for communication for the Challenging Mindset center on new opportunities, identifying external trends, testing existing business assumptions, revisiting the existing business model, and exploring new market niches. This Mindset responds well to individuals and proposals that demonstrate strategic analysis, recommend new business models, identify potential partnerships, and applies best practices throughout the organization.

In summary:

Current Bottom-Line Drivers:

Validating operational assumption, identifying trends, seizing new opportunities or niches, challenging assumptions and identifying new patterns

Current Approach:

Big picture thinking, multiple data sources, scenario analysis, business model options, and positioning for the future

Impediments:

Adherence to status-quo, short-term thinking, and risk aversion

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Your Current Inventing Communication Interests include:

Identifying new products or services, adding new features to extend product line, applying new technology, discovering new synergies, investigating new alternatives This Mindset responds well to individuals and proposals that think-out-of-the-box, search for new approaches, establish the organization as an industry leader and

In summary:

Current Bottom-Line Drivers:

Innovation, product line extensions, using technology in new ways, and breakthrough thinking

Current Approach:

Personal exchanges, written documents, research findings and investigations

Impediments:

Short-term thinking, resistance to change, weak analysis, tight deadlines, routine assignments, excessive structure

Mindsets can be predicted by asking the following objective and defining questions:

- What are your current goals?
- What results are you seeking?
- What measures are you monitoring closely?
- What do you see as the critical issues within the enterprise right now?
- What is keeping you up at night?

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This chart captures the key goal for each Mindset and the situations that would derail their goal. Remember a person may be operating from more than one Mindset.

	BOTTOM-LINE DRIVERS	APPROACH	IMPEDIMENTS
INVENTING	New products or services, innovation, new synergies, applying technology in new ways, exploring options, extending current product lines or services, testing new technology, supporting out-of-the-box thinking	Personal exchanges and/or written proposals	Tight deadlines, short-term thinking, excessive conformity, preference for tried and true, and rushed decisions
CATALYZING	Customer/client focus, increasing market share, high levels of initiative and fast response to market changes, sales, market position, customer retention and surpassing competitors	Limited formality or documentation, proposal enthusiasm, conviction, can-do attitude, strong customer track record	Slow decision making, excessive process details and resistance to change
DEVELOPING	Infrastructure, standardized policies, capacity and implementation planning, seamless systems and operations, creating robust chain of command, assigning accountabilities, and aligning resources for goal achievement	Rational analysis, sustaining excellence and written documentation	Tangential thinking, missing or weak analysis and poorly vetted proposals
PERFORMING	Process improvement, improved cycle time, safety, return on investment, improving efficiencies and workflow, profit margins, improving efficiencies, removing process deviations and improving quality	Data analysis, charts, documentation, comparison data and suggestions for optimizing resource use	Subjectivity, missing information, inattention to the "bottom-line" and incomplete analysis
PROTECTING	Internal culture, talent retention, talent development, risk analysis, succession planning, attaining Employer of Choice reputation, engaged workforce, and sense of pride	Respect for tradition, preliminary proposal refined in consultation with others and preparing workforce for the future	Short-term orientation, analysis limited to financial outcomes, conflict and change for the sake of change
CHALLENGING	Validating operational assumptions,identifying trends, seizing new opportunities, strategic thinking, organization learning, future focus, change readiness, and recognizing new patterns	Big picture thinking, multiple data sources, scenario analysis and positioning for the future	Adherence to status-quo, short-term thinking and risk aversion

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Mindset Conflict

An objective exchange of information sways thinking, surfaces new perspectives, and gains active support for an initiative. A pressing goal or critical action can be explored objectively. Facts can be exchanged without defensives. Clashes over Mindset difference tend to be constructive when both points of view are recognized as valid, since new perspective surface potentially wiser alternatives. It explores pespectives, encourages discussion and reveals new options.

Consider the following situation: If a leader operating from a Catalyzing Mindset desires rapid market growth while another leader operating from the Performing Mindset wants to improve processes and quality a disagreement can ensue. Exchanging information can reveal that the concern over quality stemmed from a large number of complaints and canceled orders. Given the new information, an agreement on improving quality could gain support as the first step towards growth.

Conflicts and tension arise when a different Mindset perspectives are discounted. Denying a point of view usually transforms an objective exploration of ideas into a subjective stand-off. Assumptions about personal self-serving agendas or motivation as well as stereotypes about underlying values and integrity are extremely difficult to resolve. A Mindset focus sustains an objective exchange.

Speaking with those operating from a different Mindset than yours requires planning and preparation. Bridging differences depends on aligning with common goals. For example:

- Inventing and Performing Mindsets differ over starting with new ideas or refining existing processes and practices. However, both of these Mindsets value ideas for improvement. They differ on whether what is needed is a breakthrough new product or refining existing processes and procedures.
- Catalyzing and Protecting Mindsets differ over prioritizing rapid market growth and customers or maintaining traditions and developing talent and culture. These mindsets both focus on people. The Catalyzing Mindset targets customers, clients, patients, or taxpayers, while the Protecting Mindset concentrates on employees.
- Developing and Challenging Mindsets differ over creating a stable structure to reduce confusion, chaos, or the need to change to meet trends, new opportunities, and new business models. Both of these Mindsets value a big picture or long-term view. The Developing Mindset sets structure and policy within the organization. The Challenging Mindset focuses outside the organization to look at trends that might alter the business strategy or identify a new niche.



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Mindset Focus by Hemisphere

Mindsets hemisphere are based on three factors:

1. Focal Point: The Right Hemisphere focuses on aspects and data within the organization and the Left Hemisphere concentrates on external realities and trends.
2. Risk Orientation: The level of acceptable risk varies with the Left Hemisphere open to accepting risk in return for new opportunities. The Mindsets in the Right Hemisphere seek to mitigated risk, avoid deviations, and prevent potential disruptions.
3. Change: The Left Hemisphere supports rapid change and the Right Hemisphere values evolutionary change.

Different Hemisphere perspectives can lead to conflict without Mindset Hemisphere awareness.



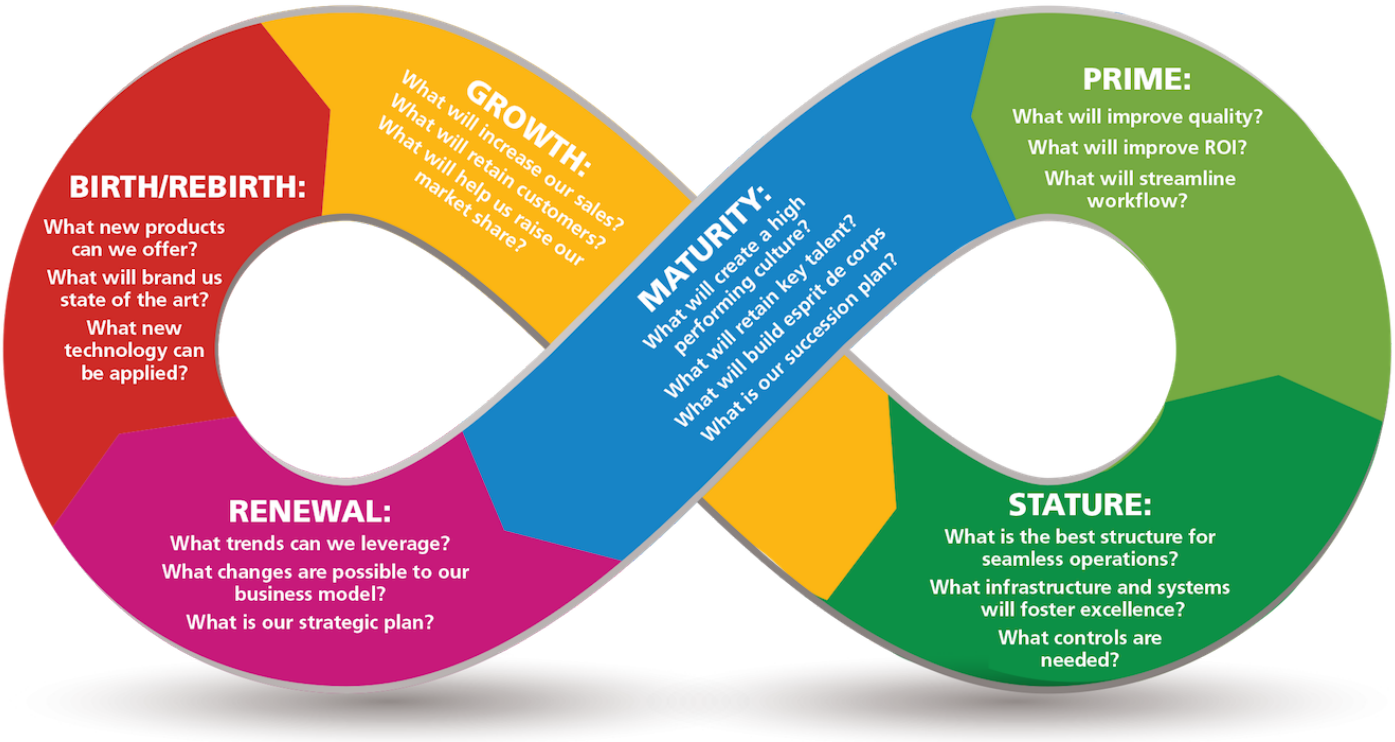
In summary, the Left Hemisphere, including the Challenging, Inventing and Catalyzing Mindsets, primarily targets external realities, rapid change, and reasonable risk for additional rewards. The Right Hemisphere, including the Developing, Performing and Protecting Mindsets, primarily targets internal realities, evolutionary change, and risk reduction.

Exploring different hemispheres viewpoints uncovers win-win solutions and builds alignment.

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Part 4: Organization Life Cycle and Mindset Alignment

Projects, products, teams, and economies operate in cycles. We recognize weather, moon, and seasons to name some common cycles. The organizational life cycle sheds light on potential Mindsets. It provides a practical framework for monitoring external and internal realities to encourage mental agility.



Organizations launch, grow, merge, dissolve, reorganize, and reinvent themselves. Enterprises have a recognizable life stages and priorities shift at each stage. Each Mindset corresponds to a different life cycle stage. The cycle can start at any point, but the most common launching pad is Birth or Rebirth which is typical entrepreneurial in orientation. This is followed by Growth in sales and market share, Stature where attention targets operational excellence, Prime where efficiencies mount as well as financial return, Maturity with its focus on talent management and engagement, and Renewal where the goal is positioning the organization for the future.

LIFE CYCLE STAGE	CONCERN	MINDSET
Birth or Rebirth	New products/services	Inventing
Growth	Sales, market share and customer service	Catalyzing
Stature	Infrastructure, policy and accountabilities	Developing
Prime	Efficiencies, quality and profit	Performing
Mature	Culture and talent development	Protecting
Renewal	Opportunities and trends	Challenging

Unlike the human life cycle, the organization life cycle and can move forward or backward. Organizations can renew themselves and endure for hundreds of years when leaders make wise decisions. The following Wheel captures the connection between Mindsets and the organization life cycle.

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The Challenging Inventing dominates during the Renewal Stage where the organization rethinks established assumptions, scans for trends and opportunities, tests new market niches, and seeks to reposition the organization for future success. The need for agility to cope with changing external realities highlights the importance of strategic thinking, critical analysis, and planning. The assumption driving the Renewal Stage is that change is necessary to remain viable and that risk is necessary to offset potential organizational failure.

This Birth/Rebirth Stage is marked by the Inventing Mindset targeting creative thinking, using technology in new ways, tweaking existing service and products and exploring the market. Entrepreneurial start-ups and organizations whose product line requires revitalization are typically at this stage.

Part 5: Sharing Your Results with Others

You are encouraged to share the Mindset framework with others including identifying your current Mindset Priority. Discussing the Mindset framework creates a practical vocabulary to boost decision making practices, generate new alternatives, and avoid potential blind spots. A Mindset discussion enables you to:

- Improve the exchange of goals, assumptions, and perceptions
- Clarify goals and decision making criteria
- Describe how each Mindset adds value
- Re-examine how to approach conflict
- Encourage the use of questions.

After the group understands your current Mindset, you may: (1) ask the group to select the Mindset that reflects their current goals, (2) discuss what your Priority Mindset means to the team and organization, and (3) discuss where the unit or organization is in the organization life cycle. This discussion builds alignment, engagement, and collaboration. The team might also take the inventory to develop a Team Mindset Priority Composite for the team.

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Part 6: Next Steps

- Examine your Mindset Priority to see if it corresponds with your current organization life cycle stage.
- Read the book, Situational Mindsets: Targeting What matters When It Matters, available as a print or eBook from Amazon to advance your mastery of the Mindset framework.
- Read the Brilliant or Blunder Action Guide for application exercises to use each Mindset. The Brilliant or Blunder Action Guide is available from Amazon and Enterprise Management Limited by contacting info@enterprisemgt.com
- Analyze the Mindsets of an individual you are working with to improve communication, influence decisions or to discover win-win solutions.
- Examine your team's current Mindset Priorities to identify strengths and potential limitations. Discover areas that the team may be overlooking to prevent blind spots.
- Consider major decisions you have made in your career to see how thoroughly you used all of the Mindsets and how your Mindsets have shifted as circumstances change.
- Check to see if your coaching and mentoring cover all six Mindsets
- Encourage others to use the Mindset vocabulary to build respect for all points of view.
- Apply the Mindset framework when tensions surface to prevent defensiveness and improve alignment.
- Introduce the Mindset framework to others to develop a common vocabulary, encourage analysis, and improve engagement.
- Tailor the Mindset Checklist for your team to use when tackling complex, unprecedented, or system-wide issues.
- Analyze your current metrics to ensure that they capture progress in all six Mindsets.

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