



Financial Services Firm EPOCH Taps Portfolio of Execs, Finds Social Motivator as a Key Driver

BOSTON, Mass., 19 2008 – Professional services firm [EPOCH](#)SM, a provider of independently employed financial services executives and accomplished professionals, partnered with talent management firm [Focus Insights](#) to conduct behavioral and motivational assessments of 200 financial services executives. A surprising trend with accomplished financial executives revealed a greater need for higher social skills and stronger influencing behaviors for success today.

While most of the executives profiled showed the traditional individualistic and utilitarian drivers still necessary to lead, these findings reflect the need for executives to focus more time and energy on their people skills as a necessary part of leadership. Key findings from the assessment, conducted across disciplines including Operations, Marketing, Sales, Finance, Human Resources, Strategists, Risk and Compliance, are:

- Strong leaders in the financial services industry increasingly possess a high social drive (the value of people and being of service to others); traditionally leaders have exhibited high utilitarian drive (bottom-line and results oriented) and this remains constant
- Gender is not a factor in the social driver/motivator
- Behaviors and motivators are similar across all disciplines at the leadership level. i.e. Human Resources, Finance, Marketing and Sales
- Leadership has just as much to do with behaviors and motivators (“fit”) as it does to skills and experience.

“With four generations employed in today’s workforce, a successful leader who naturally has high influence behaviors and social values should ensure the organization utilizes these skills to connect with their workforces in both traditional and non traditional ways,” said EPOCH Founder and President Linda Stewart. “However if a leader does not

naturally possess these behavioral characteristics of social values, it is extremely important that they recognize that they may need to surround themselves with people who naturally possess these traits. By building teams who have complementary styles, you can create highly dynamic and highly functioning work teams capable of ‘managing’ in today’s increasing complex global workforce.”

Stewart continued, “It’s worth noting that we’re seeing consistency in our findings in people across multiple organizations. We’re looking across companies – not just within one company—and seeing the same trends. Another significant finding here is, if you have great leaders, move them around. Their natural behaviors and motivators will transcend disciplines and your organization will benefit from it.”

“Behavioral and motivational assessments, like the ones used in this study, aren’t new; they’ve been used successfully in many different ways, the most common being as a component of the recruiting process,” noted Lori Moffatt, President of Focus Insights. “Today these tools can be used effectively to identify leaders who would best fit an organization and to evaluate what type of individuals a senior leadership team needs to ensure collective success based on their goals and objectives.”

EPOCH is one of the first companies to pioneer the concept of engagement style work – a.k.a. [“workshifting”](#) – by matching highly experienced executives and accomplished professionals with financial service companies that need their proven expertise for limited time and variable cost projects.

“In the course of one year, EPOCH maintains a substantial pool of talent, which includes hundreds of financial services executives. Expanding the portfolio is an ongoing process,” commented Stewart. “We’re eager to explore many questions with this group. We started with ‘what does it take to be a leader in financial services?’ and made some compelling discoveries. It’s only the beginning and the potential data we can cull will be extremely useful to evaluate and understand its impact on today’s workforce.”

About Focus Insights

Canadian-based Talent Management Company Focus Insights provides clients with innovative solutions for the recruitment, selection, development and retention of key

talent. The company built its reputation by establishing long-term relationships and delivering added value to its clients through their experience, expertise and knowledge that spans over 20 years in the industry.

Focus Insights utilizes state-of-the-industry tools and expertise needed to build and maintain High Performance Management Teams. Armed with this scientifically researched, validated knowledge, it can determine the best strategies for recruitment that will increase organizations Performance Success.

More information on Focus Insights and its Products and Services can be found at: www.focusinsights.ca.

About EPOCH

[EPOCH](#) is a pioneering provider of executive project services that help organizations obtain the executive talent they need on a free agent basis. The company's mission is to be the leading broker of independently employed financial service executives and accomplished professionals. EPOCH works with an organization's management team to accelerate the execution of critical business initiatives by identifying and engaging proven executives who have successfully completed similar projects around the world. Accomplished professionals in their portfolio have proven track records in planning and executing complex projects here and abroad.

EPOCH's founders each bring more than 25 years of executive business and recruiting experience in financial services. As accomplished professionals and executives in unprecedented numbers are seeking challenging projects in which they can leverage their expertise, organizations representing a broad cross-section of the financial services industry rely on EPOCH's portfolio to meet their critical business needs.

More information on EPOCH and its Executive Portfolio can be found at <http://www.epochworkforce.com>. EPOCH is headquartered in Boston, Mass.

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