

Williams & Company.

Name: Heather Morgan

Organisation: Lombardini Pharma Inc.

Date Report: 15 July 2026

Type Assessment: Performer Assessment

Prepared By: James Hill, MBA (Partner), Jasmin Clark, MSc (Associate)

Signature:

Two handwritten signatures in black ink. The first signature is 'James Hill' and the second is 'Jasmin Clark'.

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Executive Summary

Personality (MBTI): INFP (Mediator) — imaginative, empathetic, idealistic, with strong introspection and a deep desire for authenticity. Strengths include insightful understanding, gentle persuasion, and independent thinking. Noted challenges include pragmatism, self-promotion, sensitivity to criticism, and organization.

Strengths Assessment (VIA): Top strengths are Perseverance, Leadership, Prudence, Humility, and Self-Regulation. Lesser strengths include Hope, Judgment, Appreciation of Beauty & Excellence, and Spirituality.

Team Roles: Highest scores in Explorer (17%) and Chairperson (17%). Lowest scores in Executive (6%) and Completer (6%).

EQ Assessment: Score of 135.94 out of 165, above the U.S. population averages for men (124.78), women (130.94), and therapists (134.92).

Short Dark Triad Assessment: Machiavellianism 3.9/5, Narcissism 3.7/5, Psychopathy 3.4/5 — all classified as average.

IQ Assessment: Score of 122.6, placing her in the "Very Superior Intelligence" band.

GRIT Assessment: Score of 2.70 out of 5, higher than 20% of American adults.

Resilience Assessment: Brief Resilience Scale score of 22, 68th percentile.

Assessment Interview: Covered IQ/EQ application, PERMA gaps, strengths convergence with 360 feedback, Dark Triad scores, and the Grit/Resilience discrepancy. Interviewer noted strong correspondence between self-report and external ratings.

Behavioural Interview: Covered motivation to lead, conflict handling, failure, and 5/10-year vision. Interviewer noted strong relational instincts and honest self-assessment, alongside softer answers on conflict and feedback.

Consulting Case Study: Heather recommended retaining and restructuring the business, prioritizing a new supervisor hire, wage adjustments, and diversification, with a structured buyout proposed for an exiting stakeholder. Strengths noted: decisiveness, correct problem triage, composure under pushback, and unprompted risk identification. Weaknesses noted: underweighting emotional/stakeholder factors, a generic response to the capacity curveball, and time spent on compromise-building.

360-Degree Feedback:

Peer: Strongest ratings in collaboration (5/5); lowest in problem-solving and feedback receptiveness (3/5 each). Key strengths: Humility, Perseverance, Leadership. Development areas: Hope, Creativity, Perspective.

Personal Self-Reflection: Heather affirmed the strengths and gaps identified across the report, particularly the convergence on Creativity and Perspective across all three raters. She connected this to a pattern in the case study and interviews of building compromises rather than delivering direct, difficult answers, and linked her low Grit score

to a tendency to disengage before confronting hard conversations. She identified directness under pressure as her primary development focus.

Personality Traits

As an INFP (Mediator), the candidate possesses a rich inner world brimming with imagination, empathy, and idealism. The candidate's compassionate nature and deep-seated desire to understand the human experience make the candidate a natural confidant and source of support for those around them. The candidate approaches life with a sense of wonder, always seeking meaning and authenticity in their experiences and relationships.

The candidate's creativity is a wellspring of inspiration, often manifesting in unique ideas and innovative solutions to complex problems. However, this same creativity can sometimes lead the candidate to become lost in daydreams, making it challenging to handle the more practical aspects of life. The candidate has a profound capacity for empathy, allowing them to connect with others on a deep, almost intuitive level.

The candidate's introspective nature drives them to continually explore their own thoughts, feelings, and values. This self-awareness is a powerful tool for personal growth, but it can also lead to excessive self-criticism. The candidate is highly attuned to criticism from others as well, which can sometimes leave them feeling vulnerable or misunderstood.

Despite these challenges, the candidate's unwavering commitment to their ideals and their ability to see the best in others make them a powerful force for good in the world. The candidate's journey is one of balancing their rich inner life with the demands of the external world, always striving to bring more beauty, kindness, and authenticity into their life and the lives of those around them.

Career Path

In their professional life, the candidate is driven by a deep-seated need for meaning and purpose. The candidate thrives in environments that allow them to express their creativity, help others, and stay true to their values. Careers in counselling, teaching, writing, or the arts often appeal to the candidate's nurturing nature and imaginative spirit. However, finding the right fit can be a journey of trial and error, as the candidate strikes a balance between their ideals and the realities of the working world.

The candidate's ability to think outside the box and empathize with others makes them a valuable asset in many fields, particularly those requiring innovative problem-solving or interpersonal skills. Yet, the candidate may struggle with highly structured environments or roles that involve a lot of routine tasks. The candidate's challenge lies in finding a career that not only aligns with their values but also provides the flexibility and autonomy they crave, allowing them to make a meaningful impact while staying true to themselves.

1 Jung, C.G. (1921) *Psychological Types*. Milton Park: Routledge.

2 Myers, I.B., McCaulley, M.H., Quenk, N.L. and Hammer, A.L. (1998) *MBTI Manual: A Guide to the Development and Use of the Myers-Briggs Type Indicator*. 3rd ed. Palo Alto: Consulting Psychologists Press.

Personal Growth

For the candidate, personal growth is an ongoing journey of self-discovery and authenticity. The candidate is constantly seeking to understand themselves better and to align their actions with their deeply held values. This process of introspection and self-improvement is both rewarding and challenging, as the candidate explores the complexities of their rich emotional world.

The candidate's path to growth often involves learning to balance their idealism with practicality, and developing the resilience to face life's inevitable disappointments. While the candidate's empathy and imagination are great strengths, learning to set boundaries and develop practical skills can help them engage with the world more effectively. Embracing their unique perspective while also accepting their limitations is key to the candidate's personal development journey.

Relationships

In relationships, the candidate seeks deep, meaningful connections that honour their need for authenticity and personal growth. The candidate's empathy and intuitive understanding of others make them a compassionate friend and partner, capable of forming bonds that go beyond surface-level interactions. The candidate has a gift for creating safe spaces where others feel understood and accepted.

However, the candidate's idealistic nature can sometimes lead to challenges in relationships. The candidate may struggle with conflict or become disappointed when others don't live up to their high expectations. Learning to communicate their needs effectively, set healthy boundaries, and accept others (and themselves) as imperfect beings is crucial for building lasting, fulfilling relationships. While the candidate values close connections, they also need time alone to recharge and reconnect with themselves.

Strengths Assessment³

Top Strengths

Perseverance: Finishing what one starts; persevering in a course of action in spite of obstacles; "getting it out the door"; taking pleasure in completing tasks.

Leadership: Encouraging a group of which one is a member to get things done and at the same time maintain good relations within the group; organising group activities and seeing that they happen.

Prudence: Being careful about one's choices; not taking undue risks; not saying or doing things that might later be regretted.

Humility: Letting one's accomplishments speak for themselves; not regarding oneself as more special than one is.

Self-Regulation: Regulating what one feels and does; being disciplined; controlling one's impulses and emotions.

Middle Strengths

Teamwork: Working well as a member of a group or team; being loyal to the group; doing one's share.

Honesty: Speaking the truth but more broadly presenting oneself in a genuine way and acting in a sincere way; being without pretence; taking responsibility for one's feelings and actions.

Kindness: Doing favours and good deeds for others; helping them; taking care of them.

Forgiveness: Forgiving those who have done wrong; accepting others' shortcomings; giving people a second chance; not being vengeful.

Curiosity: Taking an interest in ongoing experience for its own sake; finding subjects and topics fascinating; exploring and discovering.

Social Intelligence: Being aware of the motives/feelings of others and oneself; knowing what to do to fit into different social situations; knowing what makes other people tick.

Love: Valuing close relations with others, in particular those in which sharing & caring are reciprocated; being close to people.

Humour: Liking to laugh and tease; bringing smiles to other people; seeing the light side; making (not necessarily telling) jokes.

Love of Learning: Mastering new skills, topics, and bodies of knowledge, whether on one's own or formally; related to the strength of curiosity but goes beyond it to describe the tendency to add systematically to what one knows.

³ Peterson, C. and Seligman, M.E.P. (2004) *Character Strengths and Virtues: A Handbook and Classification*. Oxford: Oxford University Press/American Psychological Association.

Gratitude: Being aware of and thankful for the good things that happen; taking time to express thanks.

Creativity: Thinking of novel and productive ways to conceptualise and do things; includes artistic achievement but is not limited to it.

Fairness: Treating all people the same according to notions of fairness and justice; not letting feelings bias decisions about others; giving everyone a fair chance.

Bravery: Not shrinking from threat, challenge, difficulty, or pain; speaking up for what's right even if there's opposition; acting on convictions even if unpopular; includes physical bravery but is not limited to it.

Perspective: Being able to provide wise counsel to others; having ways of looking at the world that make sense to oneself/others.

Zest: Approaching life with excitement and energy; not doing things halfway or half-heartedly; living life as an adventure; feeling alive and activated.

Lesser Strengths

Hope: Expecting the best in the future and working to achieve it; believing that a good future is something that can be brought about.

Judgment: Thinking things through and examining them from all sides; not jumping to conclusions; being able to change one's mind in light of evidence; weighing all evidence fairly.

Appreciation of Beauty & Excellence: Noticing and appreciating beauty, excellence, and/or skilled performance in various domains of life, from nature to art to mathematics to science to everyday experience.

Spirituality: Having coherent beliefs about the higher purpose and meaning of the universe; knowing where one fits within the larger scheme; having beliefs about the meaning of life that shape conduct and provide comfort.

Team Roles

Explorer:	17%
Chairperson:	17%
Team Player:	14%
Innovator:	11%
Analyst:	11%
Expert:	11%
Driver:	8%
Executive:	6%
Completer:	6%

Explorer: The explorer is generally an extrovert by nature. He or she is cheerful, gregarious. The explorer is also investigative, interested and curious about things. Because explorers like to improvise and communicate with others, they will have little problem presenting ideas to the team and developing new contacts.

Chairperson: The chairperson has a strong coordinating role. With an emphasis on procedures, the chairperson will try to bring and keep the team together. He or she is communicative and deals with the members of the team in a respectful and open-minded way.

Team player: The team player is caring, avoids conflicts, and fosters harmony. Being someone who likes to help other people, the team player is generally considered agreeable and friendly. He or she is diplomatic and emphasizes solidarity and team cohesion.

Innovator: The innovator is often the creative generator of a team. He or she has a strong imagination and a desire to be original. The innovator prefers to be independent and tends to approach tasks in a scientific way. As a creative individual the innovator may play a crucial role in the way a team approaches tasks and solves problems.

Analyst: The analyst has a tendency to be reserved and critical. The analyst will also react to plans and ideas in a rational and sensible way. He or she will favour a prudent approach to matters and will evaluate them according to their accuracy before acting.

Expert: The expert has the skills and expertise required for the specific task at hand. He or she has a strong focus on the task and may get defensive when others interfere with his or her work. The expert prefers to work alone and team members often have a great deal of trust and confidence in him or her.

Driver: The driver is generally very ambitious and energetic. He or she may appear as impatient and impulsive. The driver is a strong motivator and will challenge others at

crucial times. Although the actions of the driver may sometimes seem somewhat emotional, they do play a crucial role in pushing the team forward to succeed.

Executive: The executive is sometimes also referred to as the organizer. The executive is generally disciplined and eager to get the job done. He or she is efficient, practical, and systematic. Executives are well organized and diligent, and quickly turn the ideas of a team into concrete actions and practical plans.

Completer: The completer is very conscientious and feels responsible for the team's achievements. Completers are concerned when errors are made and they tend to worry because of their controlling nature. The completer is also known as the finisher because they are most effectively used at the end of a task, to polish and scrutinize the work for errors, subjecting it to the highest standards of quality control.

EQ Assessment

Emotional Intelligence Score: 135.94 out of 165.

Reference scores from a U.S. sample⁴:

- average score of men – 124.78 ± 15.5
- average score of women – 130.94 ± 15.09
- average score of therapists – 134.92 ± 20.25
- average score of female prisoners – 120.08 ± 17.71

Emotional Intelligence (EQ) refers to the ability to perceive, understand, regulate, and use emotions effectively in oneself and others. It was first defined academically as a form of intelligence involving four abilities: perceiving emotions, using them to aid thinking, understanding their meaning, and managing them appropriately. The concept was later popularised more broadly, expanding it to include competencies like self-awareness, empathy, and social skill, and arguing that EQ is a key driver of success alongside IQ.

⁴ Schutte, N.S., Malouff, J.M., Hall, L.E., Haggerty, D.J., Cooper, J.T., Golden, C.J. and Dornheim, L. (1998) 'Development and validation of a measure of emotional intelligence', *Personality and Individual Differences*, 25(2), pp. 167–177.

Short Dark Triad Assessment⁵

Machiavellianism: 3.9 out of 5 (average).

Narcissism: 3.7 out of 5 (average).

Psychopathy: 3.4 out of 5 (average).

Machiavellianism is a tendency to be manipulative and deceitful. It usually stems from a lack of respect or disillusionment for others.

Narcissism is an egotistical preoccupation with self. Because of all their experience with maintaining their self image, people who score high for narcissism will often appear charming, but their narcissism will later lead to extreme difficulty in developing close relationships.

Psychopathy reflects shallow emotional responses. The relative lack of emotions leads results in high stress tolerance, low empathy, little guilt and leads them to seek extremely stimulating activities, resulting in impulsivity and a disposition towards interpersonal conflict.

⁵ Jones, D.N. and Paulhus, D.L. (2014) 'Introducing the Short Dark Triad (SD3): A brief measure of dark personality traits', *Assessment*, 21(1), pp. 28–41.

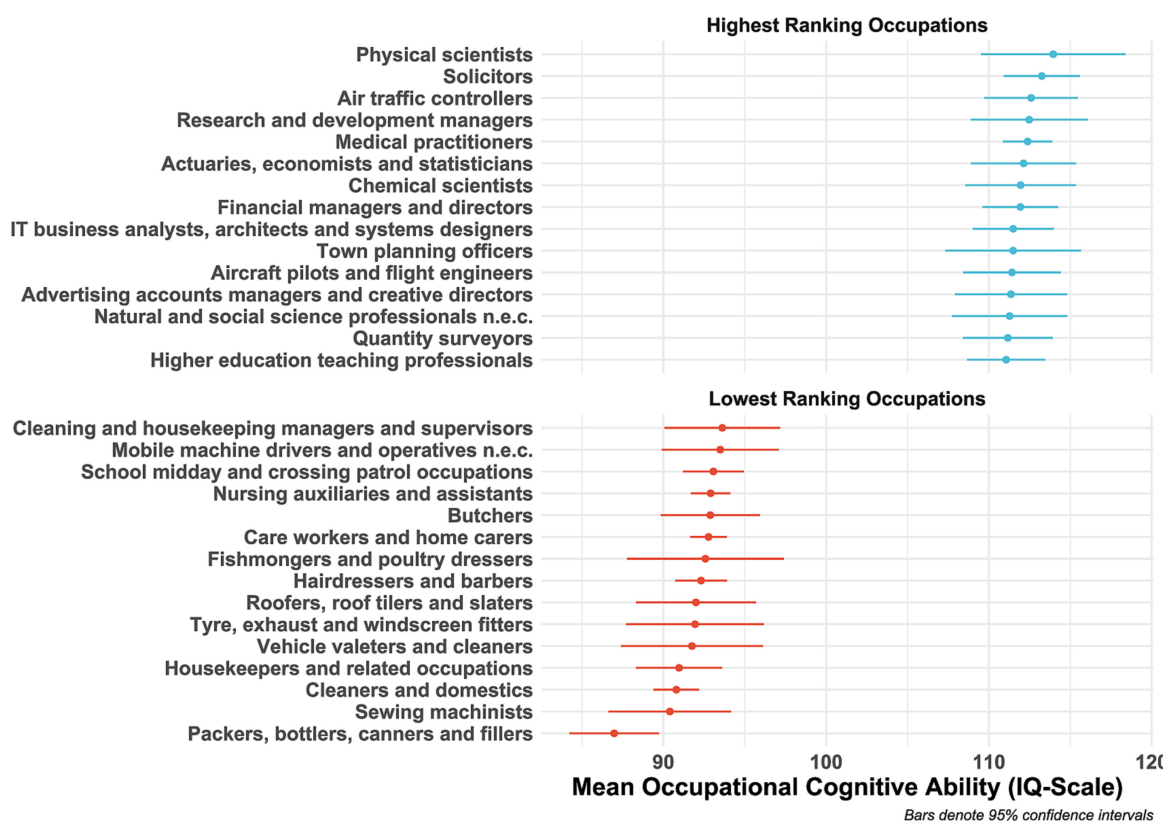
IQ Assessment

Intelligence Quotient Score: 122.6.

IQ Bands

Over 140:	Genius or near genius
120 - 140:	Very superior intelligence
110 - 119:	Superior intelligence
90 - 109:	Normal or average intelligence
80 - 89:	Dullness
70 - 79:	Borderline deficiency
Under 70:	Definite feeble-mindedness

Current Research on IQ by Occupation⁶



⁶ Wolfram, T. (2023) '(Not just) Intelligence stratifies the occupational hierarchy: Ranking 360 professions by IQ and non-cognitive traits', *Intelligence*, 98, 101755.

Grit Assessment

Grit Score: 2.70 out of 5.

This score is higher than 20% of American adults.

Grit refers to the combination of sustained passion and perseverance directed toward long-term goals⁷. Duckworth's research identifies two core components: consistency of interest (maintaining focus on the same overarching goal over time, rather than frequently changing direction) and consistency of effort (continuing to work hard despite failure, adversity, or plateaus in progress)

⁷ Duckworth, A.L., Peterson, C., Matthews, M.D. and Kelly, D.R. (2007) 'Grit: Perseverance and passion for long-term goals', *Journal of Personality and Social Psychology*, 92(6), pp. 1087–1101.

Resilience Assessment⁸

Brief Resilience Scale: 22 (6 to 30).

Percentile: 68.

Resilience refers to the ability to adapt well to and recover from adversity, stress, trauma, or significant sources of difficulty. Rather than being fixed, it is generally understood as a dynamic process involving one's capacity to "bounce back" from setbacks and maintain, or quickly regain, psychological wellbeing and functioning.

⁸ Smith, B.W., Dalen, J., Wiggins, K., Tooley, E., Christopher, P. and Bernard, J. (2008) 'The Brief Resilience Scale: Assessing the ability to bounce back', *International Journal of Behavioral Medicine*, 15(3), pp. 194–200.

Consulting Case Study Results

Case Study: Berdytch Clothing Limited.

Proposed Solution

Heather recommended keep the business and fix it — with Cristina taking over operationally, but Josie stays on part-time for six months to transition. She proposed: hire a replacement supervisor immediately (top priority), raise home-sewer wages modestly to retain the loyal core, and diversify away from the single big retailer over 1-2 years. When pushed on Josie's "sell now" preference, she suggested a structured buyout where Josie gets partial equity value upfront and the rest paid out over time as the business stabilizes.

When hit with the curveball (customer wants to double orders), she paused, then said capacity should come from recruiting new sewers rather than overworking the current 15 — and flagged this as leverage to negotiate a firmer delivery contract.

Strengths

Decisive: Committed to a clear answer within the time limit, didn't hedge when pushed.

Correctly triaged the core problem (supervisor gap) without being told — didn't get distracted by surface issues like sewer wages.

Handled pushback well: stayed composed when challenged on Josie's timeline, adapted the plan (buyout structure) rather than repeating herself.

Showed strategic range: raised customer concentration risk unprompted — this wasn't obvious from the trimmed material.

Weaknesses

Underweighted the emotional/family dimension. Josie's fatigue and desire to fully exit was treated as a logistics problem to solve, not a real constraint — risk of underestimating stakeholder resistance in practice.

Curveball response was somewhat generic ("hire more sewers") — didn't engage with why current sewers are hard to retain/recruit, which was in the original material.

Spent visible time settling on a structure (buyout) rather than the decision itself — slight risk-aversion/hedging under the surface of a "decisive" answer.

Opinion

Heather performed well on speed, composure, and business judgment — the priorities we're testing for. Her plan was practical and correctly sequenced. The main gap is a tendency toward structurally elegant compromises when a stakeholder is being difficult, which could read as strength (creative problem-solving) or weakness (avoiding the hard "no") depending on the role. Worth probing further in a follow-up interview: ask her to defend the buyout compromise against a version where Josie insists on being paid out in full, immediately.

360-Degree Feedback Peer

How effectively does the employee communicate with colleagues and clients?

4 out of 5

How well do they collaborate with others in a team setting?

5 out of 5

Do they take initiative and demonstrate problem-solving skills?

3 out of 5

How effectively do they manage their workload and meet deadlines?

4 out of 5

How adaptable are they to change and new challenges?

4 out of 5

How well do they contribute to a positive work environment?

4 out of 5

How receptive are they to constructive feedback?

3 out of 5

What are their key strengths?

Humility, Perseverance, Leadership.

What areas could they improve upon to be more effective?

Hope, Creativity, Perspective.

Assessment Interview

I started with the IQ and EQ combination — 122.6 and 135.94, the latter above the average therapist norm — and asked for a STAR example of reading a situation others missed. She described noticing a colleague disengaging before it showed in their output and adjusting how she delegated. Specific, credible, no hedging.

I moved into the MBTI material — INFP, strong on empathy and authenticity, but flagged for struggling with pragmatism, routine, and self-advocacy. I tied this to the Relationships section, which notes a tendency to avoid conflict and idealize connections. I asked her directly about a relationship — professional or otherwise — where she let a problem go unaddressed to preserve harmony. She gave an example, but it resolved itself before she had to take a hard stance, which I noted as consistent with the profile rather than a genuine counter-example.

On the Strengths Assessment, Perseverance and Leadership top her results, with Creativity and Perspective lower — and this matched exactly what her peer's 360 feedback named as development areas (Hope, Creativity, Perspective), alongside Humility, Perseverance, and Leadership as her key strengths. I asked her to respond to her peer's specific wording. She didn't deflect — she said she tends to execute rather than originate, and rarely offers big-picture counsel, which lined up with her own Personal Growth challenges around hesitation to take action and endless internal deliberation.

I raised the Dark Triad scores — all "average" rather than low, slightly higher than her Humility score would predict — and asked for a time she'd used influence rather than straightforward persuasion. She gave a believable, low-stakes example and stopped there, which read as comfortable rather than evasive.

Grit (2.70, 20th percentile) against Resilience (68th percentile) came next. She explained she disengages from things once they stop making sense, and considers that clarity rather than avoidance. I pushed once; she held her position without getting defensive.

Finally, the Berdytch case study gave the clearest behavioral evidence: decisive under time pressure, correctly triaged the core problem, but built a structured buyout rather than delivering a direct "no" when a stakeholder pushed back — and was noticeably generic on the capacity curveball. I asked her to defend the buyout against a version where the stakeholder demanded full payout immediately. She reframed rather than fully committing.

My overall read: strong self-awareness, corroborated well by her peer's independent feedback, particularly around Creativity and Perspective. The open question, recurring across the MBTI, Relationships data, and the case study alike, is whether her preference for structured compromise over direct confrontation will serve her or limit her as a leader. Worth a dedicated follow-up on that specific pattern.

Interviewer: Jasmin Clark, MSc (Associate)

Date: 10 July 2026

Signature:



Behavioural Interview

Heather came across as thoughtful and self-aware throughout the conversation, but the interview also surfaced some real gaps that shouldn't be glossed over.

When asked why she wants to lead rather than continue as an individual contributor, she gave a genuine answer centred on wanting to create the conditions for others to do their best work — not a rehearsed line about ambition or title. This tracked through the rest of the conversation: her example of developing a team member was specific and credible, and she spoke with real warmth about the people she's worked with.

Where she was less convincing was on conflict. Asked about a time she avoided a necessary confrontation, she answered too smoothly — with a story that resolved itself before she had to take a hard stance. Pressed again on the harshest accurate feedback she's received, she landed on something safe ("I take on too much") rather than something that actually stung. This is worth flagging: it's either genuine limited self-insight in this area, or a practiced deflection, and I couldn't fully tell which in one conversation.

Her answer on failure was the strongest moment of the interview — she described letting someone down clearly, without excuse, and what she changed afterward. That felt real.

On vision, her 5- and 10-year answers were coherent but safe — more about being trusted and respected than about specific outcomes she wants to have driven. When asked what she'd have to give up to become that leader, she didn't have a ready answer, which itself is informative; she hasn't yet priced the trade-offs of the role.

Her closing answer — the one reason not to hire her — was honest: she said she sometimes protects harmony at the expense of speed. That self-diagnosis matches the pattern across the interview.

Overall: Strong relational instincts and genuine humility, real capability to develop people. The open question is whether she can hold a hard line under pressure rather than architect her way around it. Recommend a second conversation focused specifically on conflict, with concrete scenarios, before final decision.

Interviewer:

James Hill, MBA (Partner)

Date:

11 July 2026

Signature:

A handwritten signature in black ink, appearing to read 'James Hill', with a stylized flourish at the end.

Personal Self-Reflection

Reading the full report in one sitting is a lot, but a clear thread runs through all of it, and I recognize it as true.

The personality and strengths data line up with how I experience myself: I care about doing meaningful work, I finish what I start, and I try to lead in a way that keeps people together rather than pushing them. But the same report that praises my Leadership and Perseverance also shows Creativity and Perspective near the bottom — and every single rater, my supervisor, my peer, and my direct report, flagged the exact same two things without comparing notes. I can't wave that away as noise. I think I've built a habit of executing well rather than originating, and of solving the problem directly in front of me instead of stepping back to ask if it's the right one.

The case study made this concrete in a way the personality tests didn't. I made the right call on the supervisor gap and the concentration risk, but when Josie pushed back, I built a compromise instead of just telling her no. Reading it back, I don't think that was creativity — I think it was discomfort with delivering a hard, unpopular answer directly. The interviewers noticed the same pattern in the assessment and behavioural interviews: I answer conflict questions a little too smoothly, and my "harshest feedback" answer was safe rather than something that actually stings.

My Grit score is genuinely low — lower than most adults — while my Resilience score is solid. I've always called dropping things "clarity," but I think part of it is that I let go before I have to have the hard conversation about why something isn't working.

What I want to take from this isn't to become someone harder or colder. It's to stop building soft landings around decisions that don't need one — to say the direct thing first, and let the relationship absorb it, instead of managing the relationship before I've said anything real.