



25 Years & So Much Gratitude – What an Amazing Ride So Far!



**By Nancy Parsons
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Celebrating 25 years in business fills me with gratitude and joy. I am so thankful and honored to do this work and to collaborate and partner with so many exceptional individuals, and to work with such an array of incredible and interesting clients.

While I also just penned, [Clouds Over My Festive Spirit in Celebrating 25 Years in Business](#), which addresses the steep challenges we continue to face in revolutionizing leadership effectiveness at large, I am writing this to celebrate and honor this amazing business journey.

Going back to October 1998, I am grateful to have co-founded CDR Assessment Group (now CDR Companies, LLC) with [Kimberly Leveridge, Ph. D.](#). Kim is one of the smartest people I know, has deep compassion and knowledge, and is a guru when it comes to the science, analysis and application of assessments. Kim is the consummate expert in assessments, research, leadership, selection, coaching and more. In the mid 90s, Kim spent more than six years at Hogan Assessments as she earned her Ph.D. in Industrial Organizational Psychology.

What I also love about Kim is her great sense of humor. In a new business with the many ups and downs, and even with our own contrasting styles – we could always find a way to laugh together.





You have to be able to have the occasional belly laugh or you won't survive some of the rocky or stressful times.

Now, I do have to replay our opening story – several events seemed like a bad omen at the very start, so it was almost unbelievable in that we continued on. This is an excerpt from an article where I was interviewed for Authority Magazine, [5 Ways to Identify & Retain Top Talent](#), by Kate Spatz about those events:



“I do have a story, however, of an odd twist of fate that we persevered through. I signed the contract with the company we were going to buy scoring and data from in the early days, which was the Friday before Labor Day weekend of 1998. After, I left Tulsa to go to my daughters’ soccer tournament in Plano, Texas. During the early Saturday morning game, my oldest daughter, Katie Moore, who was a high school junior, was going in to score on the Dallas D’Feeters. The Sweeper (defender) took her out in a nasty hit, and she suffered a compound fracture of the tibia and fibula. She was rushed to the Plano, TX hospital for emergency surgery. So, my husband was going to fly (to Dallas) to be with us. However, he suffered a medical emergency himself while he was on the way to the airport and ended up in St. John’s Medical Center in Tulsa. I had two loved ones in two different cities having surgery the day after I signed the contract. (Thankfully, everyone recovered over time.)

Then my business partner, Kimberly Leveridge Ph.D. and I opened CDR Assessment Group on Monday, October 5, 1998, at our new offices. That night, Kim went to step aerobics at the local YWCA. She fell off the bench and broke **both** wrists.

Were these bad omens? I hoped not. We worked really hard, developed our assessments and managed life the best we could. The lesson I learned was that you never know what life will



deal you and to do your best and stay focused on your mission and your family's needs. This forced me to be extremely productive and adaptable to get through those tough first few months. We met our goals and sent our assessments to be copyrighted to the Library of Congress at the end of December. This later saved our business."

So, life went on, business went on, and here we are today, 25 years later.

A little more about Kim before I move on to other people I wish to thank. Kim and I designed and instructed the CDR Executive Coaches Certification programs over the years. Kim and I both continue to coach executives and coaches too. Kim is always good at giving me sage and witty advice. One line of feedback she gave me years ago, since I am a bit of an Upstager with high Sociability



too, she said, "Easy killer, I got it five minutes ago!" I still share that with coaching classes to succinctly describe how Upstagers can push their view too hard and relentlessly! Today, Kim continues as a partner and scientific advisor to CDR and serves full time as the VP of Professional Development for Oklahoma Non-Profits. Thank you, Kim!



Of course, from the start, my husband and best friend, William C Parsons, MD ("Bill"), has provided me and us with unrelenting support. Being the spouse of an entrepreneur isn't always easy and he has always supported not only the business but our vision to transform leadership. In fact, Bill was a key catalyst to us completing the CDR-U Coach digital avatar coaching project. I had this project design in the queue for several

years and had worked on development but stalled after our move to Texas. He kept after me – when are you going to complete the technology to provide scaling coaching for all? He was actually a cheerleader for this breakthrough! Of course, most importantly, I share a wonderful life with Bill, our four highly successful adult children and their spouses, nine grandchildren, and four spoiled dogs. I am truly blessed by sharing my life with Bill and our family.

Next, I am jumping to the present. Christine Klatt, is a more recent business partner but she is a force. She leads operations, client services and technology projects for us. Her unrivaled talent is equaled by her kindness. Christine led the technology and project management to complete CDR-U Coach which was a daunting task to say the least. I wrote and developed the avatar coaches' feedback based on a culmination of my many years as an executive coach – I scripted, formulated algorithms, personalized the coaching, shared developmental tips, guided action plans, etc. while she did the heavy lifting of making it all work. She is amazing and I am so thankful to partner with Christine.



We have had numerous terrific CDR team members along the way – thank you all. To name a few, thanks to: Sydney Hoffman, Laura Parker, Ivonne Perez Jones, Edward White, Ed.D., Summer Brown, Sandra Johnson, Ana Paula Jacome, Matt Cook, Lisa Harrell, Kelly Langston, India Flager, Angela Spadaro and many more.

While I would love to mention every coach and client to thank them and to replay the stories, accomplishments, tough challenges, and the rest, clearly there are too many to mention. In fact, we have had some executive coaches with us since the early days, for which I am grateful! Here are just a couple of cool and fun client memories (not in any particular order):

The Pentagon

We worked with Chief Learning Officer (DOD - AT&L), Leslye McDade Morrison, Ph.D. for several years on assessing leaders, coaching, linking CDR data to competencies and their LMS contents and more. Interesting story, at first, her team expressed concern in our CDR Risk Assessment scale titled, “Rule Breaker.” They said that following the rules was required in the military. I remember Kim saying, isn’t that why people go into the military, because they like to break things? Anyway, they relented, and we used our language as is. Leslye, by the way, was the inspiration for CDR-U Coach – when she moved to the US Army Civilian University, she asked us to come up with a digital or avatar type coach!



Spain



We so enjoy working with IE.edu and the coaches who provide international executives and leaders who attend IE's leadership programs with coaching. I have conducted several coaches' certification programs for IE coaches in Madrid, Spain hosted by Marta Williams, Executive Coach Leader, and Stephen Adamson, Director, Leadership Development Programs. Anyway, Marta

asked me to provide, for my first time, a fairly extensive "live" coaching demonstration. A great sport - Stephen volunteered to be coached using his own CDR data. Since then, I have provided several live coaching examples on video for teaching purposes as this took away my stage fright in demonstrating what is usually a very personal, one-to-one dialogue.

Alaska

Working with the Alaska Native Health Care organizations, including South Central Foundation since around 2007, has been invigorating and interesting. One trend that I have found interesting, and a little amusing is that nearly all of those we have assessed, probably more than 1000 people, they all have elevations or high scores on the risk factor of "Eccentric." I think it is the light/dark thing! I have so enjoyed visiting their sites in Alaska. Although, I must admit, it was weird teaching a workshop at 11 am with it still being dark outside.



Fort Sill



Years back, we did a research project for the U.S. Army at Ft. Sill comparing the performance of soldiers under live versus simulated fire training using personality measures and observations. While Kim was the research lead, part of her role included going to Ft. Sill to observe when it was over 100° F in Oklahoma! While that was tough, we worked with a Major

involved in the project that we, in our "shop talk", affectionately called "Major Hottie". With him in an eye's view, Kim made it through this tough duty. (I am now mature enough - with 9 grandchildren -- to be free to speak as this was pretty funny at the time.)

Canadian Food Manufacturing Company Reverse Play

We once had an HR Executive being considered for a CHRO position by a large food manufacturing company ask that the hiring CEO take the assessments so that we could see if they were a good fit for each other. They weren't. No job offer was made. A win-win result.



Judith Glaser Singing

Many years back, when we were in Tulsa, we offered a special executive coaching certification program. Judith Glaser participated. Many of you know and loved Judith (now deceased) who wrote Conversational Intelligence. She was an amazing light among us. I had previously met her in

Hawaii where we were both speaking at a Coach-U Conference. Anyway, I remember her leading the way, playing the piano leading us in singing along at the McBirney Mansion in Tulsa. So much fun! This was prior to her writing her famed book and solidifying her legacy.

Car Rideshare Company

I facilitated a couple of leadership team sessions for this company in San Francisco a few years back. We custom design each session based on the team members' data. On this one team, I developed a module where I put them in groups based on their Adjustment scores on the Character Assessment. Adjustment measures the degree to which one is confident, relaxed, calm and laid back

versus those who are intense, edgy, tough on self and others and not resilient to stress. They had no idea how I had made up the teams as they had not seen the data. They all said they thought I was "psychic" to have known to split them this way. I laughed at that and said, no, it's the data. It was clear, these groups were not happy with the other's approach or their interactions. We spent much of that day working through conflicts, differences, needs and forming new ways to work productively together, while understanding and honoring the differences. Adjustment is not a common difference as it was on this team, but this was so glaring we had to tackle it. Also, the manager was in the low scoring group!



Pipeline Company Union Organizing Concern



We had performed validity research on a variety of hourly workers for this pipeline company for jobs like technicians, gaugers and operational workers to development selection screening cut-off scores with our assessments. A couple of years later, the HR leader was concerned they may be having a unionization threat underway because no one showed up at the Safety Awards Banquet. We went back to the validity research of the incumbents data and explained that they did not need to worry about this. This was because their employees had low scores on Fame & Feedback and Companionship and Affiliation. This meant they did not like public praise or going to events like banquet dinners. We suggested they reward them by honoring their interests in Business & Finance and perhaps by giving them a dinner gift card where they could celebrate in a more intimate, private way!

Veterans

Several years back, we worked with five different Veterans organizations in the Houston area to provide assessments, workshops, volunteer (by CDR Coaches) one-to-one career coaching, certification training programs for veterans. These initiatives were aimed to support veterans finding their best-fit career and educational paths. We had over 70 veterans participate along with about a dozen volunteer CDR Coaches, and it was a fulfilling opportunity for us to give back to those who serve for us. Our goal was to not have them waste a day pursuing the wrong career or educational path and to



help them get to their own best track for success and happiness. One thing we learned is that 55% of the veterans had low scores on "Career Focus" on the CDR Character Assessment subscale which means they went into the military because they were career ambivalent – or didn't know what they wanted to be. Sadly, when they come out of the military, they still aren't sure what they want to do since this is a personality trait – so we were delighted to help them clarify their strengths and motivational needs to get them on track! I hope to work with more veterans' organizations moving forward.

Oklahoma City University – Meinders’ School of Business, IE.edu Business School, Illinois State University



And others. We love working with our educational clients and partners who use our assessments in the executive education, MBA and professional development classes. Truly, the folks we get to work with at these academic organizations are the cream of the crop!

Becky, Becky, Becky

This was a life changing accomplishment for us and a testament to why we do what we do. About twenty years ago, Becky was an Administrative Assistant in Salt Lake City and had felt stymied in that role. After taking our assessment measures, we identified her as having STEM talent and the potential to be an IS Analyst, which aligned with an initiative we were contracted for - finding “hidden talent” for Williams Companies. She was relocated to Tulsa for this new opportunity as a Systems



Analyst after completing the Boot Camp, or upskilling, training. Becky wrote, “from a professional standpoint, it has been really exciting because I am now working on a large companywide project, developing systems from the ground up. Also, the most impressive part of the redeploy selection process itself was the coaching feedback I received with my assessment results. It is something I recommend to everyone. I feel extremely fortunate that I was part of this initial group.”

“...Going full circle after more than 16 years, today while writing this, I checked Becky’s LinkedIn profile, and I was thrilled to say the least. Since the many years when Becky’s hidden IS talents were first “discovered” (by our assessment measures) and was promoted out of an administrative role, her career has soared within the IS field and leadership ranks. She wrote to me:

‘Your message made my day! It’s so wonderful to hear from you!! I have often thought of your organization’s part in my career and the life-changing opportunity that was provided for me some time ago now.

... the value of your work has impacted my life tremendously in such a positive way. When I applied for the program, I was thrilled at the prospect but honestly questioned whether I would be a good match, and then your assessments boosted my confidence so much. Thank you. Thank you. THANK YOU!’ Becky. – My response: Thank you Becky!



The Alexcel Group

Being a member of this prestigious, yet small, executive coaching group of 30, has touched my professional life in profound ways. Alexcel stands for The Alliance for Leadership Excellence, an international alliance of highly experienced consultants



and executive coaches who meet semi-annually and participate in professional development regularly together. Most important, this is a kind group of top-notch executive coaches who develop deep supportive, long-term friendships. I am so thankful!

Thanks to All CDR Coaches:

CDR Certified External & Internal Coaches – Goodness, there are so many coaches who we enjoy and have loved working with over the years. We still have our bi-monthly coaches connect meetings which are great sessions to share tough cases, interesting challenges, ideas and the rest. I wish I could go on telling stories and sharing memories, but I think those expressions of gratitude will need to wait for a future book.

Humbling Recognition:

Awards & Honors: I am very grateful, humbled and gratified for the awards and recognition of the years. Below are three of our finest honors. Of course, these were accomplished due to our wonderful team's efforts and contributions! These were:

- CDR-U Coach, the first of its kind, digital avatar coach that provides individualized feedback and development for all employees which was awarded the 2021 Gold Star Winner of the “Best New Product or Service of the Year” by the Stevie Awards for Women in Business.
- MEECO International Thought Leader of Distinction in Executive Coaching (2019).
- Author of the Amazon bestseller, researched based book (2019): *Women Are Creating the Glass Ceiling and Have the Power to End It*

With Gratitude

There are so many more people and memories – **thank you all!** After hitting the 25-year milestone, CDR Companies is looking forward to continuing to support you, make a difference, innovate, build new and reinforce long standing relationships, and to help individuals and businesses transform for new levels of success. We aim to reach our vision to revolutionize leadership and talent development!