

BERTEIG

Real Agility Assessment

CLIENT NAME

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DATE

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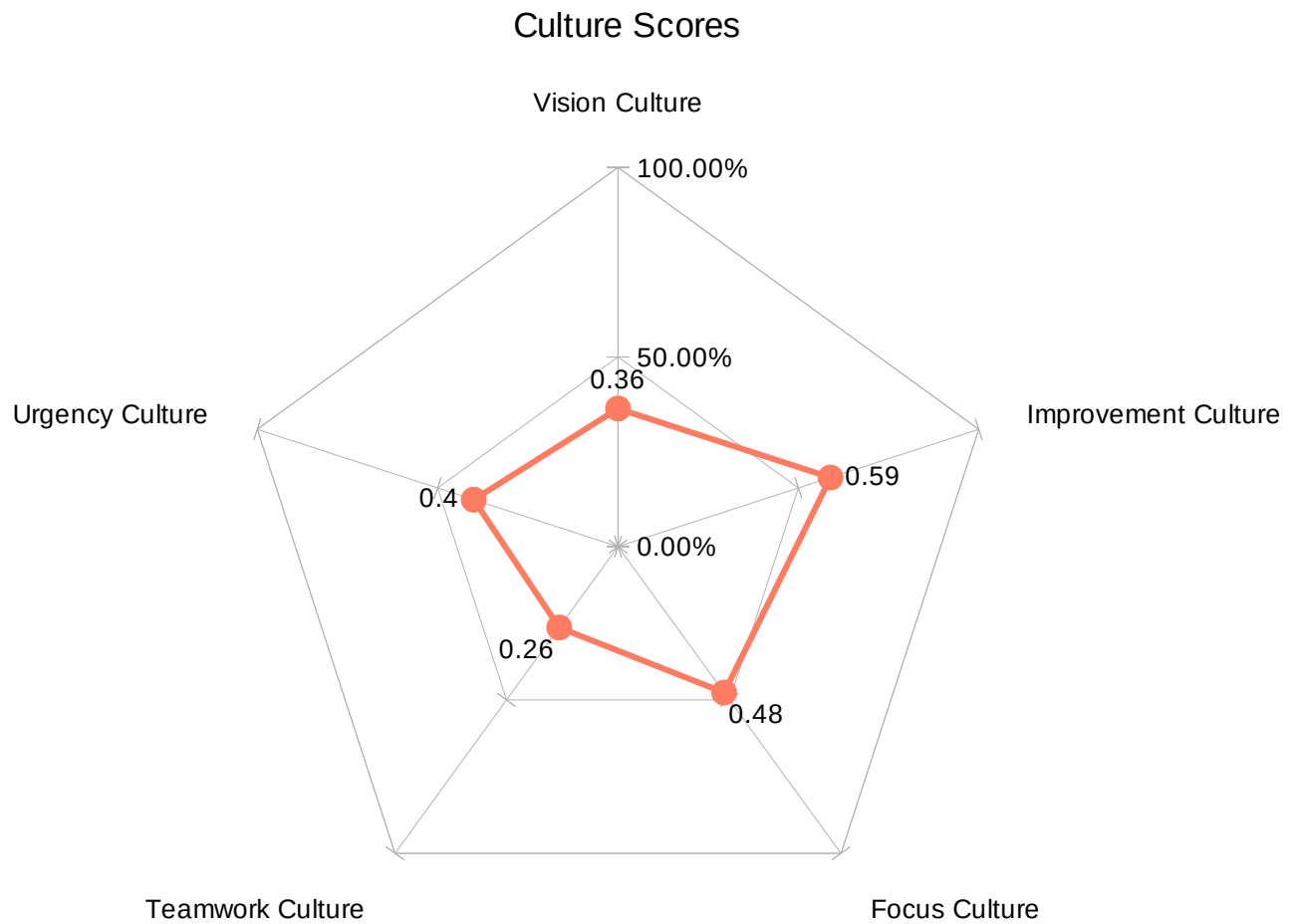
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Summary

CLIENT has a relatively strong improvement culture which will support the continued adoption of Real Agility to improve business results and the work environment. However, the current teamwork and vision levels in the organization are low and need dramatic improvement to obtain the benefits of Real Agility.

Culture Scores

The high level scores for the RAA are illustrated here:



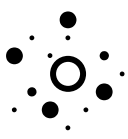
Refer to the detailed explanations on the next page...

In descending order of strength:



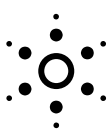
Improvement culture: 59%. This is significantly above average compared to organizations we have worked with in the past. It represents a good bias to improvement at all levels. This score means that the culture of improvement can be leveraged with some additional leadership support to help the organization create a better delivery environment that is more productive, higher quality, and results in a better workplace for staff and managers.

Description: Improvement culture indicates how easily and frequently people within the organization take the initiative to work on systematic improvement initiatives, vs. temporary problem-fixing and bandaid solutions.



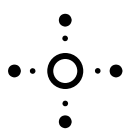
Focus culture: 48%. This is a little below average compared to organizations we have worked with in the past. It represents a mild challenge in sustaining initiatives that are longer-term or that are not considered urgent, and a tendency to multitask in order to satisfy multiple stakeholders who may not be aligned.

Description: Focus culture refers to the ability of people within the organization to work in an uninterrupted fashion towards a single clear objective vs. the level of multi-tasking, interruption and distraction.



Urgency culture: 40%. This is significantly below average compared to organizations we have worked with in the past. The low score here is also a drag on both improvement and motivation to deliver excellent results for customers and users. Improving the urgency culture should be a high priority for leadership.

Description: Urgency culture indicates the positive feeling of urgency that means that people in the organization care about the timeliness of delivering solutions (sooner rather than later) and have a strong emotional connection to the need to deliver vs. urgency related to technical or business emergencies coming from individual agendas.



Vision culture: 36%. This is significantly below average compared to organizations we have worked with in the past. It represents a large gap in leadership's effectiveness in motivating high-performance results from staff individually or in teams and a tendency to require strong, directive management with reward/punishment type motivation.

Description: Vision culture is the degree to which people in the organization are working towards "transcendent" goals (related to long-term, organization-level, service-oriented aspects of work) vs. individual and possibly self-serving goals such as career development, financial success or even supporting a family.



Teamwork culture: 26%. Although low, this is a little above average compared to organizations we have worked with in the past. It represents a huge opportunity for improvement in both productivity and work satisfaction at the delivery level in the organization. A low score here is one of the biggest hinderances to real agility.

Description: Teamwork culture refers to the degree to which the people in the organization work in well-established teams with strong mutual commitment, collaboration and communication vs. working as individuals with isolated goals, management directives, or a team-disruptive environment.

Current Challenges

The following challenges facing your organization were identified by survey participants:

1. Late project deliveries
 - 17 out of 35 survey participants selected this item
 - 71% of leaders selected this item
 - 31% of staff selected this item
2. Long wait times for decisions to be made
 - 16 out of 35 survey participants selected this item
 - 79% of leaders selected this item
 - 23% of staff selected this item
3. Slow time to market
 - 16 out of 35 survey participants selected this item
 - 79% of leaders selected this item
 - 15% of staff selected this item

There is poor shared understanding between leaders and staff on the challenges facing the organization. Here are the top five challenges identified by number of survey participants selecting the item:

Leadership	Staff
Slow time to market	Lack of knowledge sharing among staff
Long wait times for decisions to be made	Organizational mis-alignment
Late project deliveries	Poor market response to products or services
Low staff morale	Late project deliveries
Staff complacency – no drive to improvement	(5 items tied for 5th place)

Overall, staff had only 44% of the level of concern about all current challenges as compared to leadership, and the level of alignment of staff on leadership’s top five identified challenges was 52%.

Management Priorities

The following were identified as management priorities by participants in the survey:

1. Creating innovative products and/or services
 - 20 out of 35 survey participants selected this item
 - 71% of leaders selected this item
 - 62% of staff selected this item
2. Customer satisfaction and relationships
 - 18 out of 35 survey participants selected this item
 - 50% of leaders selected this item
 - 46% of staff selected this item
3. Generating revenue and meeting targets
 - 18 out of 35 survey participants selected this item
 - 71% of leaders selected this item
 - 31% of staff selected this item

Generally there is good shared understanding between leaders and staff on the current management priorities. Here are the top 5 management priorities identified by number of survey participants selecting the item:

Leadership	Staff
Creating innovative products and/or services	Creating innovative products and/or services
Generating revenue and meeting targets	Customer satisfaction and relationships
Customer satisfaction and relationships	Delivering high quality results
Keeping costs low (less than half selected this)	Providing value to shareholders
Delivering customer value (less than half selected this)	Keeping costs low

The level of alignment of staff on leadership's top five identified priorities was 87%.

Statistics

There were 35 responses to the survey. Participants are grouped into three categories:

Leadership: 14 respondents

Staff: 13 respondents

Other: 8 respondents

All 35 responses are included in the overall culture scores. However, for the purposes of examining alignment between leadership and staff, the “other” respondents are excluded from the results.

Other organizations scored as follows:

Cultural Attribute	CLIENT	Minimum	Average	Maximum
Vision Culture	36%	20%	48%	73%
Urgency Culture	40%	28%	52%	91%
Teamwork Culture	26%	15%	24%	38%
Focus Culture	48%	43%	49%	57%
Improvement Culture	59%	41%	54%	63%

Recommendations

BERTEIG will provide a detailed proposal for supporting CLIENT in a separate document.

Appendix: Survey Questions Reference

The **Real Agility Organizational Culture Assessment** is designed to get a picture of what it is like to work at your organization. This survey form will take approximately 15 minutes of your time. Please answer all questions truthfully. Your submission is anonymous. The Organization Code and Tracking Code are used for categories of responses, and cannot be used to identify individual people. If you do not have codes, then you will be unable to use this survey.

1. Your Position (NOTE: "dotted-line" reports are people who report to you temporarily for some portion of their work but who report to a different person who is responsible for their performance reviews and ultimately their continued employment in the organization)

- Individual Contributor (you have neither direct nor "dotted-line" reports)
- Management (you have direct or "dotted-line" reports and you report to other managers or leaders)
- Leadership (you have direct reports and you report to the Board of Directors, President, CEO an/or Executive Director of the organization)
- Member of the Board of Directors
- Other (you have an additional position that is not included above eg. Advisor)

2. Your financial relationship to the organization:

- Salaried, full-time employee
- Salaried, part-time employee
- Hourly employee
- Temporary contractor paid an hourly or daily rate
- Professional on retainer
- Owner of voting shares in the organization

This next set of questions are about the current circumstances of your organization.

3. Your current challenges – choose all of the following you believe currently apply anywhere in your organization:

- Poor market response to products or services
- Late project deliveries
- High operating costs
- Poor vendor relationships
- Low stakeholder satisfaction
- Unrealistic stakeholder expectations
- Low staff morale
- Business losing market share
- Business losing money
- Organizational mis-alignment
- Poor quality in products or services
- Staff complacency – no drive to improvement
- Distrust between parts of the organization
- Long wait times for decisions to be made

- High staff turnover
- Managers overworked
- Unhappy customers
- Uncertain vision or strategy
- Excessive overtime
- Slow time to market
- Lack of knowledge sharing among staff
- “Death March” projects

4. Management Priorities – which of the following are the highest priorities for management and leadership in your organization?

- Providing value to shareholders
- Creating innovative products and/or services
- Having fun and enjoying work
- Making a difference in the world
- Staff morale and engagement
- Keeping costs low
- Customer satisfaction and relationships
- Power and political machinations
- Staying ahead of the competition
- Operational excellence (efficiency and process quality)
- Generating revenue and meeting targets
- Technical excellence
- Growing and maintaining the reputation of the brand
- Delivering high quality results
- Building marketshare and dominating a segment
- Delivering customer value
- I don't know what management priorities are
- Other priority not on this list

5. How likely do you feel it is that your organization will miss a business-critical window of opportunity?

- No chance at all!
- Could happen, but not likely
- Fifty-fifty chance
- Very likely, but not certain
- Near certainty!

6. How likely do you feel it is that an internal problem (technology, business, operational) will cause a major business failure in the next six months?

- No chance at all!
- Could happen, but not likely
- Fifty-fifty chance
- Very likely, but not certain
- Near certainty!

7. How likely do you feel it is that a competitor is going to severely damage your business in the next six months?

- No chance at all!
- Could happen, but not likely
- Fifty-fifty chance
- Very likely, but not certain
- Near certainty!

For each of the following, rate how applicable these descriptions are for your organization on a scale of zero (0) to five (5) using the sliders. A score of zero means that they are not at all applicable and a score of five means that the description fits your organization perfectly. It is okay to have seemingly contradictory descriptions for your organization.

8. Work priorities are:

- ...solution or engineering driven
- ...management or process driven
- ...customer or user driven

9. How do people know what to do when no one tells them?

- No meaningful job descriptions
- Many job descriptions
- Few job descriptions

10. Work is accomplished by the efforts of:

- ...heroic performers
- ...focused specialists
- ...multi-skilled generalists

11. Strategic organizational information is...

- ...shared informally or unavailable
- ...restricted and "need to know"
- ...widely and clearly shared

12. How many levels of management?

- No visible management
- Many levels of management
- Few levels of management

13. People focus their attention on....

- ...whatever is urgent
- ...their function or department
- ... the whole business

14. Staff are working towards...

- ...no goals / implicit goals.
- ...segregated individual goals
- ...clear, shared goals

15. To an outsider or new employee, work appears...

- ...productive
- ...organized
- ...chaotic

16. Staff have a vision of their work that is based on...

- ...responding to emergencies
- ...problem solving
- ...emphasis on purpose

17. People take responsibility by...

- ...blame, denial or pass-the-buck
- ...escalating management commitment
- ...staff/worker commitment

18. Over time, improvement in the organization are...

- ...temporary or non-existent
- ...made at a surface level
- ...continuous, systematic and measurable

19. People doing work are...

- ...uncontrolled
- ...management controlled
- ...self-controlled

20. Decisions are based on...

- ...whim and expediency
- ...policies and procedures
- ...values and principles

25. In your personal opinion, how important is it for your organization to improve how people do their work?

- Not important, we're already doing great!
- Somewhat important: we are doing well, but there's always room for improvement.

- Important: there are clear areas we need to improve.
- Urgent: there are important areas where we need to quickly improve.
- Critical Importance: if we don't improve now, we will fail as a business.