

B E R T E I G

Real Agility™
Assessment Track



Getting Started: The Assessment Track

- The first step in reducing stress and realizing your potential as a manager is to do the Real Agility Assessment Track
- The Assessment Track helps you:
 - Discover the hidden cultural sources of stress (and support)
 - Identify key areas of mis-alignment between leadership and staff
 - Benchmark your current level of Real Agility™ (organizational maturity)
 - See the specific, practical and systematic lines of action you can take
 - Choose the right level of training, coaching and consulting support

Assessment Track Benefits

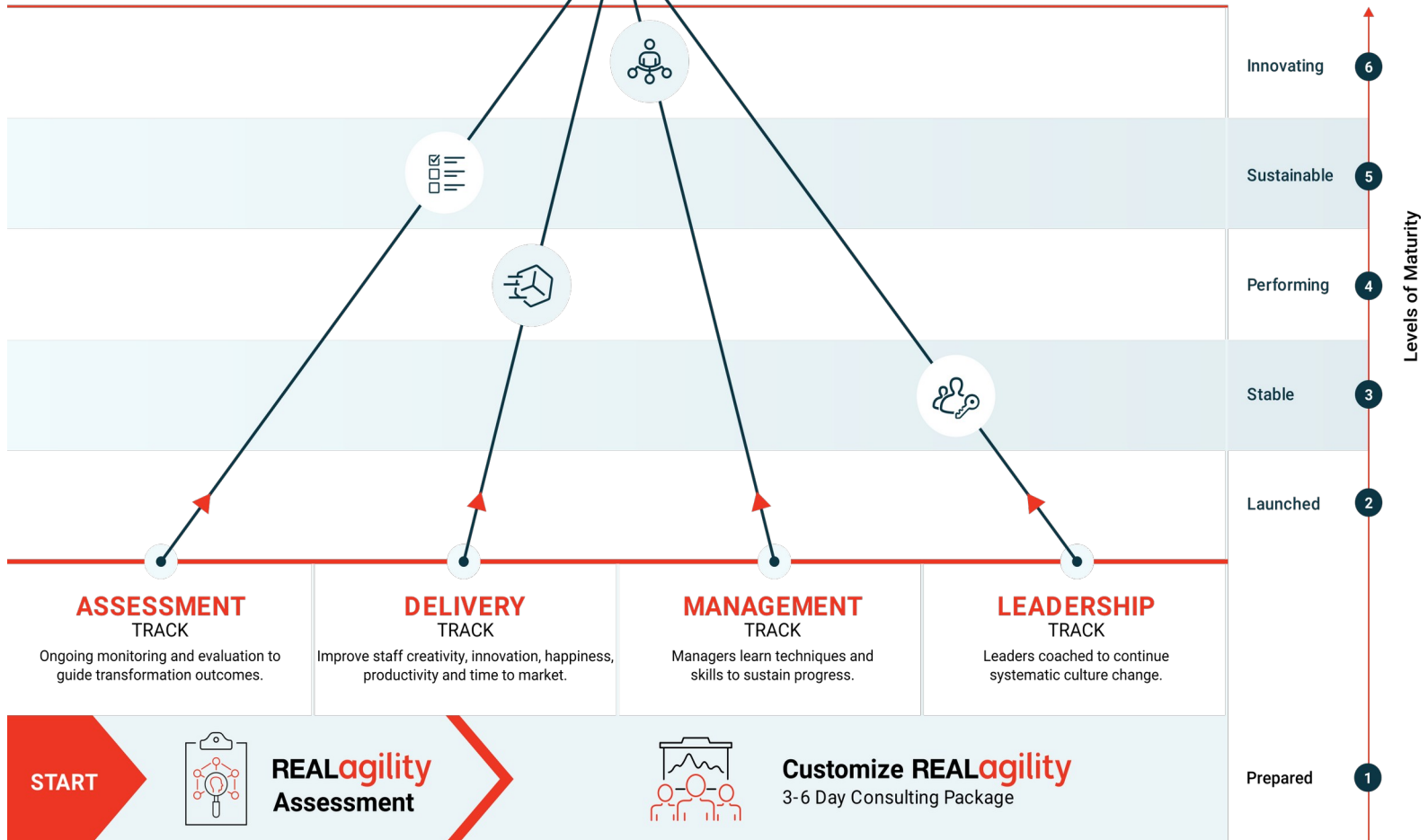
- In-depth benchmarking and analysis of your current state
- Strategic advice on taking your transformation to the next level, including expected business results
- Specific lines of action you can embark upon internally without outside coaching or consulting support
- Customized versions of the Real Agility™ Program tracks with full facilitators' manuals designed for your internal coaches to execute
- Recommendations for coaching and training support from BERTEIG to accelerate your transformation

Assessment Track Overview

- The Assessment Track has been tested and refined since it was first used in 2004 at Capital One.
- The Assessment Track is part of the larger Real Agility™ Program that also includes the Delivery, Management and Leadership Tracks.
- The outcome of the Assessment Track is the Real Agility™ Playbook (a document) and Executive Summary (a presentation).

REALagility

- Lasting Change
- Faster Delivery
- Less Waste



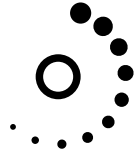
The Assessment Track Activities Include:

- 1) Real Agility™ Assessment Survey and Analysis (RAASA)
- 2) 1-on-1 Interviews and workshops
- 3) Current state KPI's and documentation review
- 4) Playbook creation
- 5) Playbook review with key stakeholders
- 6) Playbook/Executive Summary presentation

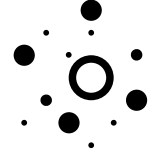
Real Agility™ Assessment Survey and Analysis (RAASA)

- Identifies cultural supports and hinderances to Real Agility
- Identifies gaps in understanding between management and staff
- Provides benchmark scores for culture, ideally tracked every quarter
- Used to create foundational recommendations for improvement
- Used to identify areas needing deeper assessment

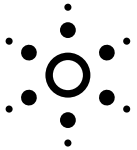
Real Agility™ Assessment Survey and Analysis (RAASA)



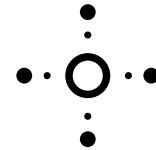
IMPROVEMENT CULTURE
How well do your people take the initiative to improve?



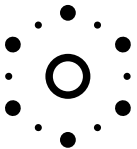
FOCUS CULTURE
Can your people focus on their work without task switching or interruptions?



URGENCY CULTURE
Do your people care about delivering results now and not later?



VISION CULTURE
Are the people in your company united around a common vision?



TEAMWORK CULTURE
Do your people share a strong mutual commitment?

The report generated reveals the soul of your current culture, grounded in real, actionable data to improve on the problem areas unique to your organization.

1-on-1 Interviews and workshops

- BERTEIG conducts interviews and workshops (all virtual) with the organization's leadership, stakeholders and staff.
- There will be workshops with any existing teams, plus a number of additional workshop topics from the list below that are selected based on the results of RAASA.
- Examples of possible workshops:
 - value-stream mapping,
 - technology and technical agility,
 - end-to-end service review,
 - SWOT analysis,
 - leadership agility assessment,
 - team-level skills matrix.

Current state KPI's and documentation review

- 1) Current strategy and vision
- 2) Current financial picture
- 3) Organizational Structure
- 4) Project allocation capacity
- 5) KPI and other metrics

The Real Agility™ Playbook

- **BERTEIG delivers a report or “Real Agility Playbook” that provides:**
 - Raw data and data summaries (anonymized)
 - In-depth analysis of assessment results on current state
 - Assessment of your change readiness and resilience
 - Advice (next slide)

The Real Agility™ Playbook

- **BERTEIG delivers a report or “Real Agility Playbook” that provides advice on taking your organization to the next level:**
 - culture change initiatives
 - leadership growth opportunities
 - customized Agile methods & techniques
 - systemic efficiency improvements
 - internal informal communities
 - tools and technology recommendations
 - expected business results

The Real Agility™ Playbook

- **BERTEIG delivers a report or “Real Agility Playbook” that provides:**
 - Specific lines of action you can embark upon internally without outside coaching or consulting support
 - executive leadership actions
 - management techniques and skills
 - team development
 - governance and process changes
 - Recommendations for coaching and training support from BERTEIG to accelerate your transformation

The Real Agility™ Playbook – Incremental Delivery

- 1) Playbook V0.1 - RAASA Survey results
- 2) Playbook V0.5 - Previous version + Interview and workshop results
- 3) Playbook V0.9 - Previous version + Documentation review
- 4) Playbook V1.0 - Final Version including executive summary
 - All versions include recommendations and roadmap for improved business agility and performance

Assessment Track Logistics

- Delivered virtually
- Milestone-based billing
- Client single point of contact for workshops and 1-on-1 scheduling
- Includes lead consultant and supporting consultant(s)
- Single point of contact to provide documentation and metrics
- Executive leadership team engaged in process

Assessment Track Time Allocation

- 1) Real Agility™ Assessment Survey and Analysis: 3 to 10 days
- 2) 1-on-1 Interviews and workshops: 2 to 20 days depending on scope
- 3) Documentation review: 1 to 5 days depending on scope
- 4) Playbook review with key stakeholders: 2 days
- 5) Playbook/Executive Summary presentation: 90 minutes

Total elapsed for the 5 steps: 2 to 6 weeks depending on scope

Assessment Track Pricing and Billing Milestones

- Base Pricing (excludes expenses and applicable taxes):
 - Delivery of Playbook v0.1, CA\$5,000
 - Delivery of Playbook v0.5, CA\$15,000
 - Delivery of Playbook v0.9, CA\$15,000
 - Delivery of Playbook v1.0 and delivery of Executive presentation, CA\$15,000
 - Total: CA\$50,000
- Price adjustment for scope:
 - Up to 200 people – no adjustment
 - 201 to 1000 people – base price + 50%: \$75,000
 - 1001 to 5000 people – base price + 100%: \$100,000
 - 5001 or more people – base price + 200%: \$150,000