

ORGANIZATIONAL EXCELLENCE ASSESSMENT

XXXX Team Report, COMPANY X

MM - DD - YYYY

CONFIDENTIAL

OVERVIEW

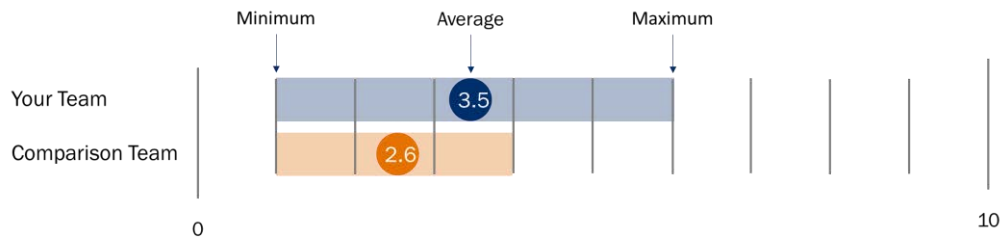
Today's organizations face increasingly uncertain and dynamic circumstances, where the stakes are high, and even small mistakes can be quickly amplified on social media to derail business operations. Simultaneously, a wide variety of stakeholders, from employees to investors, are looking to align their values with the organizations they interact with, and therefore there are increasing opportunities to create value. Several research studies have converged on the conclusion that to excel in this changing environment, organizations need to develop and strengthen the following disciplines:



Excellent teams embed these practices into their normal ways of working rather than outsource them to other parts of the organization. The purpose of this assessment is to help your team measure your current level of performance in relation to these disciplines so that you can identify opportunities to increase the value you deliver to critical stakeholders, and better inoculate your organization against unforeseen risks.

HOW TO READ THIS REPORT:

The data for each response is displayed in a chart that depicts the team's average response, as well as the minimum and maximum.



Your Team includes the minimum, average, and maximum scores from your team on a specific item.

Comparison Team includes the responses of the other teams from your organization that took the assessment at the same time as a benchmark.

INSIGHTS are noted below questions to make it easier to interpret your results and see any gaps between your team's aspirations and current practice. Any potential points of reflection or next steps for your team will also be suggested here.

EXECUTIVE SUMMARY

This page provides a snapshot of how your team scored on each of the six disciplines. Some of the detailed items are reverse coded (denoted with an ^R) to provide a consistent general measure. Further detail and suggestions for improvement are in provided within the report.

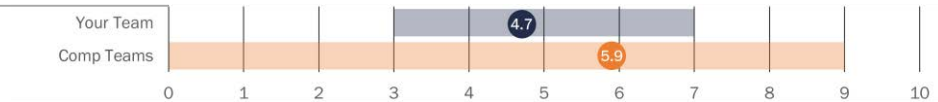
BUILD STRONG STAKEHOLDER RELATIONSHIPS

Average score across eight dimensions



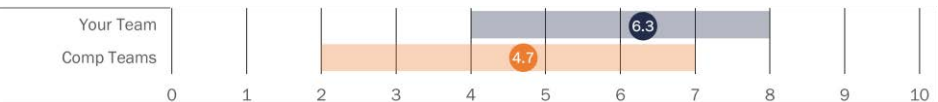
UNLEASH THE POWER OF PURPOSE

Average score across eight dimensions



ENGAGE EMPLOYEES' WHOLE-SELF

Average score across eight dimensions



CREATE AN ENVIRONMENT FOR LEARNING

Average score across eight dimensions



ANTICIPATE AND MITIGATE RISKS

Average score across eight dimensions



ALIGN OPERATIONS WITH VALUES

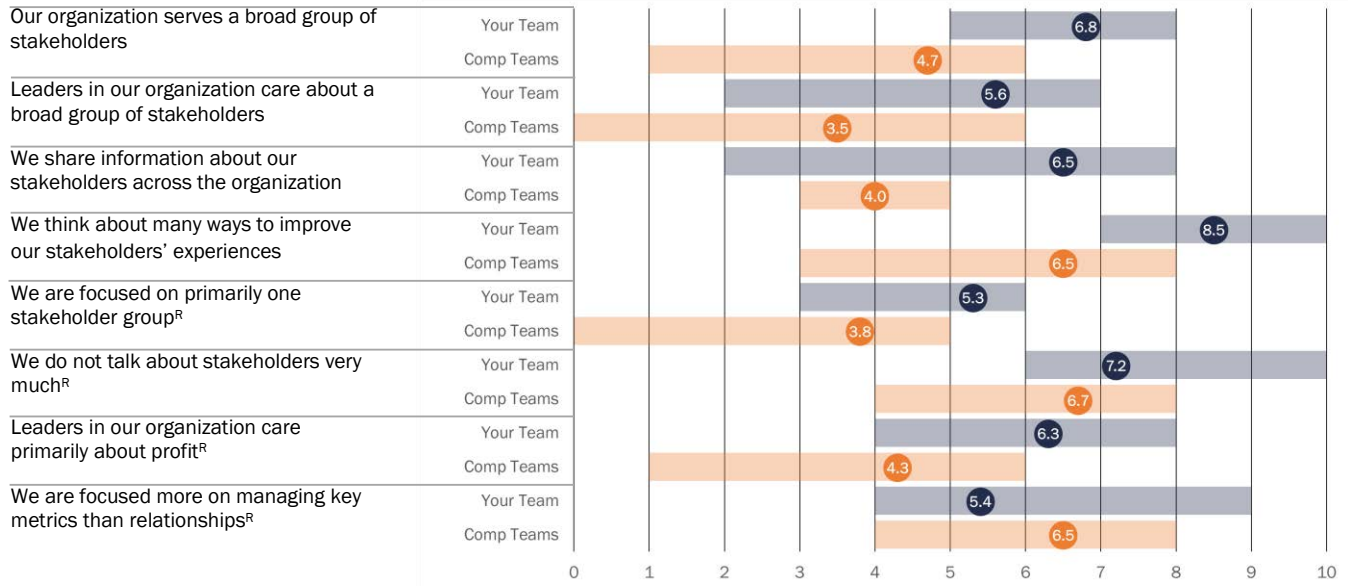
Average score across eight dimensions



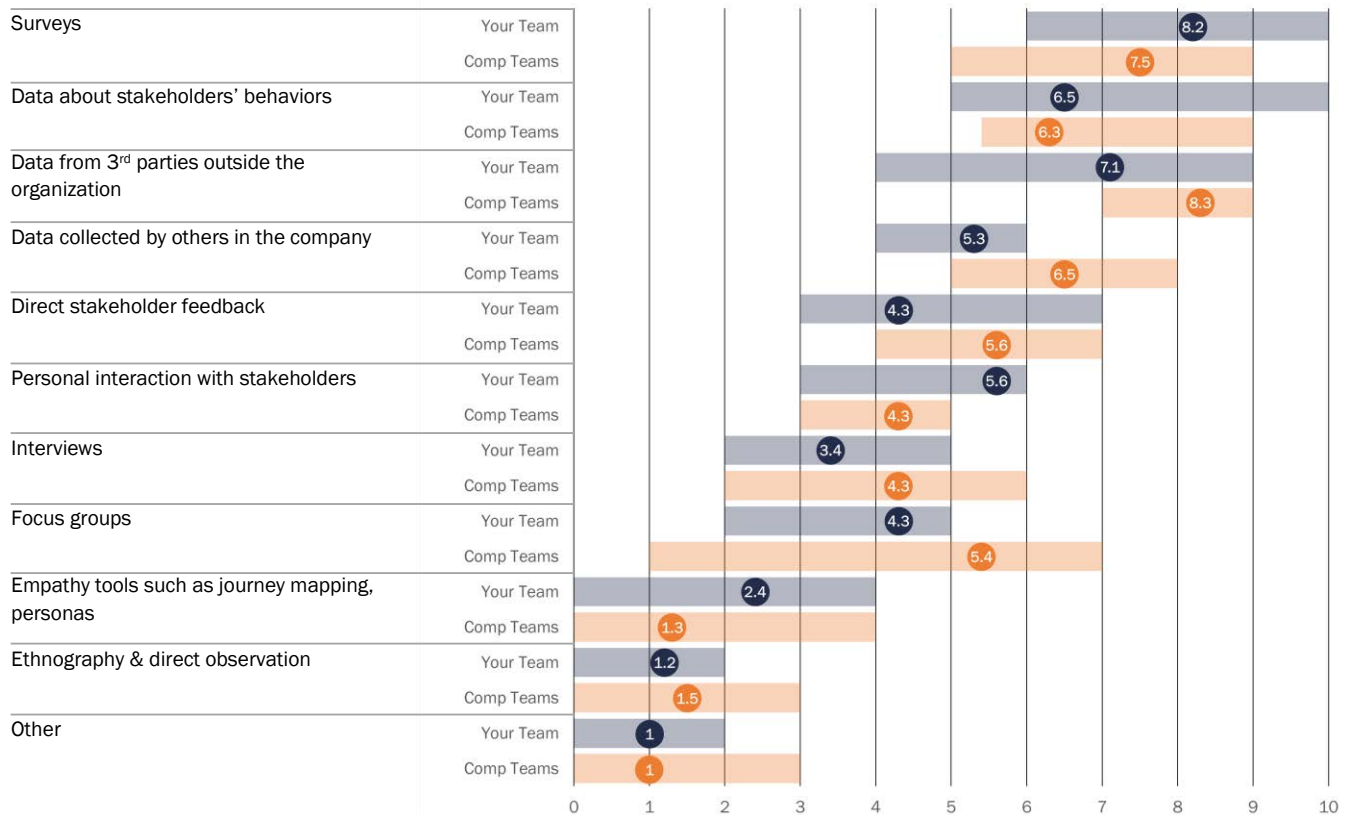
INSIGHT: Your team shows an overall strength in the following disciplines: building strong stakeholder relationships and aligning operations with values. You are middle of the pack on: creating an environment for learning, and anticipating and mitigating risks. Clear areas for improvement include: unleashing the power of purpose and engaging employees' whole-self. Subsequent sections of this report will unpack these scores in more detail with specific suggestions and feedback from your team.

BUILD STRONG STAKEHOLDER RELATIONSHIPS: Stakeholders are groups or individuals that can affect or be affected by the organization’s activities. Organizations that understand and actively manage relationships with various stakeholder groups are more likely to succeed because they can identify opportunities for growth and adjust more quickly to changing circumstances.

How much do you agree with the following statements? (0 = strongly disagree, 10 = strongly agree)



How often do you use the following tools to learn about your stakeholders? (0 = never, 10 = very often)



INSIGHT: The ability to learn and adapt to a changing environment is enhanced when organizations intentionally manage stakeholder relationships. Additionally, research shows that managing for stakeholders unleashes intrinsic motivation and increased engagement by employees. Overall your team agrees with the statement, “we think about many ways to improve stakeholders’ experiences.” Your team agrees least with the statement, “we do not talk about stakeholders very much.” Overall, your team’s answers to these statements indicate a general weakness in this discipline. To continue to develop your capacity for building strong stakeholder relationships, use the results in this report to identify where your most significant opportunities lie. Think about: 1) when and how you talk about stakeholders, 2) the systems and processes you use to learn about stakeholders, and 3) how you involve stakeholders in decision-making. How might you modify your current practices to improve this discipline?

Additionally, successful teams find ways to engage and learn about their stakeholders. The more direct your engagement with stakeholders the richer data you can collect about them and the more novel and useful your insights about them. Your team is most likely to use: focus groups and empathy tools to learn about stakeholders. What strengths and weaknesses do you see in your current stakeholder engagement practices? How might your insights about your crucial stakeholders improve if you were to use different methods to engage them? Once you identify opportunities to use new tools to learn about your stakeholders, research the tools and make a list of best practices and pitfalls to avoid, then create a few low cost opportunities to try out the new tools before using them more broadly.

In terms of managing stakeholder relationships, what does your organization do well? (All team comments)

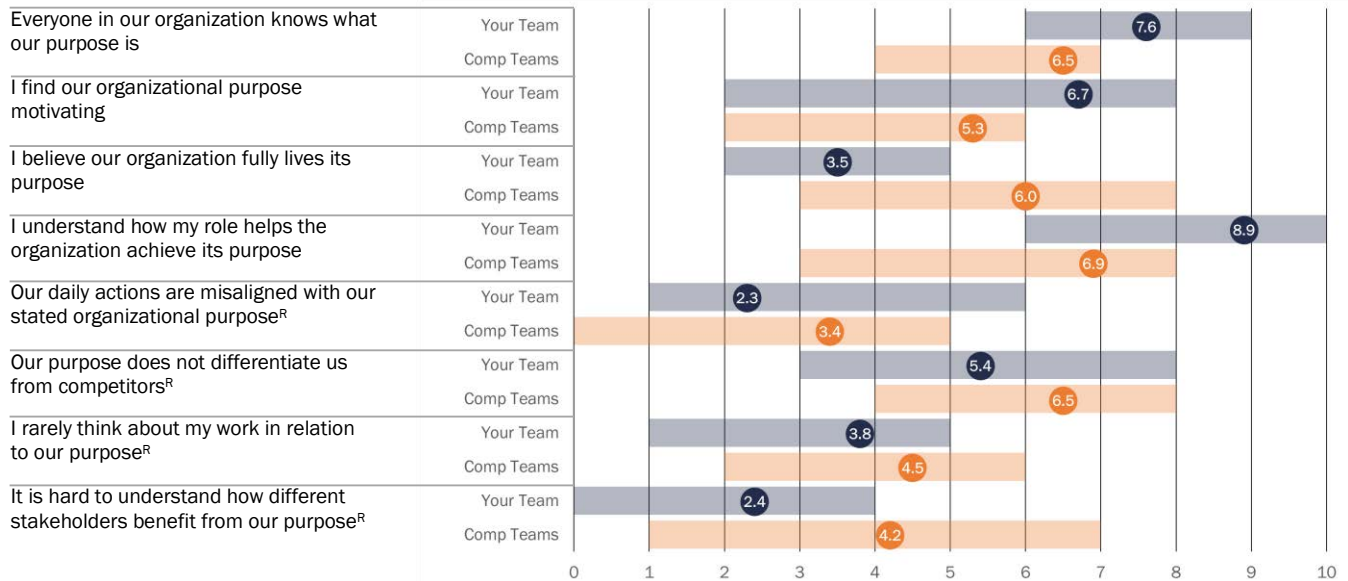
- “We repeatedly check in with our customers to see how things are working for them and learn about their changing preferences.”
- “We use state of the art relationship management tools to help us keep pace with our stakeholders.”
- “I appreciate that there are people that are formally responsible for different relationships.”

In terms of managing stakeholder relationships, what do you think needs to be improved? (All team comments)

- “Sometimes I think we rely too much on general data about our stakeholders – we should have more unmediated access to them.”
- “I’m unclear about how we should interact with groups that are not our primary stakeholders, but maybe the primary stakeholder for others in the organization – perhaps we can ensure that we’re not working across purposes for these groups.”
- “I don’t think we consult enough groups in making decisions, but we can reduce the number that we involve in the decision. I feel like the decision process is unwieldy if too many folks are at the decision-making table – if we involved them earlier in the process, we could get their buy-in without handing over so much control so late in the process.”

UNLEASH THE POWER OF PURPOSE: “Why does your organization exist?” By clearly articulating a unique answer to that question, you can tap into powerful drivers of performance such as intrinsic motivation and perseverance.

How much do you agree with the following statements? (0 = strongly disagree, 10 = strongly agree)



INSIGHT: Purpose provides the motivation that brings together different individuals and groups to achieve something that no individual could achieve on their own. Your team agrees most with the statement, “Our purpose does not differentiate us from our competitors.” Your team agrees least with the statement, ‘I believe that our organization fully lives its purpose.’ Overall, your team demonstrates a modest strength in this practice. To continue to develop your capacity for unleashing the power of purpose, use the results in this report to identify where your most significant opportunities lie. Then think about: 1) when and how you talk about purpose, 2) how individual employees can personalize and share their connection to the organizational purpose, and 3) the gaps in how you operate and your purpose. How might you modify your current practices to improve this discipline?

What current systems, processes, and routines help your organization best achieve your purpose? (All team comments)

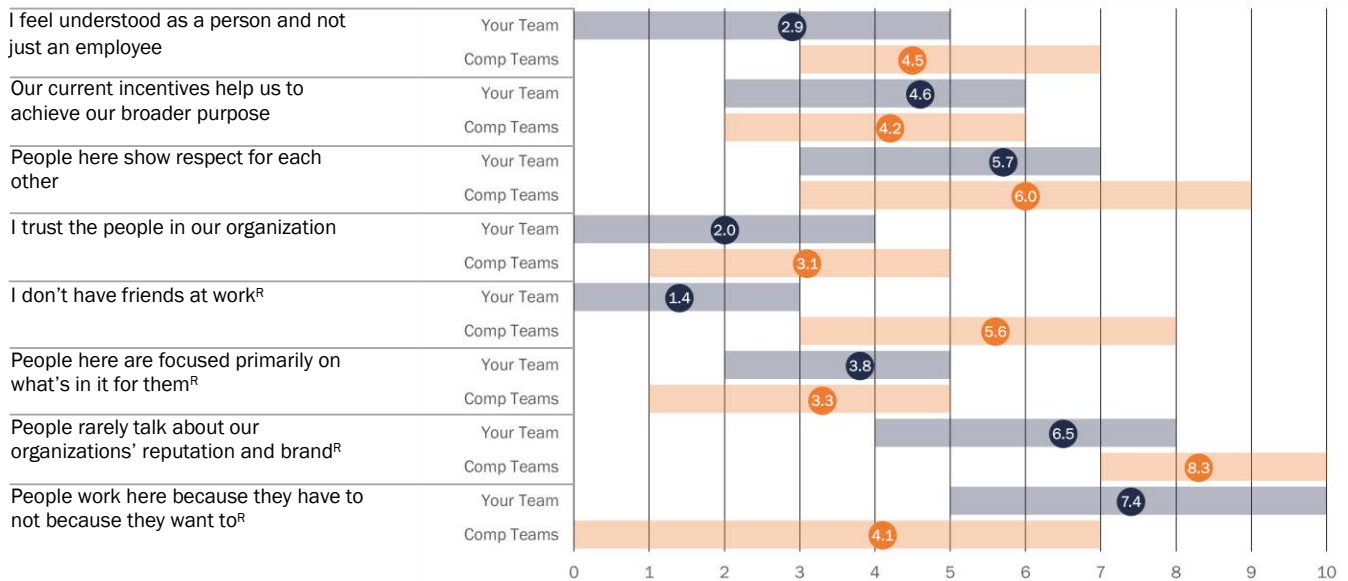
- “I think our recruiting system does a nice job of helping us find people who care about our values and purpose.”
- “I like that many of our stakeholders refer to our purpose in their communication with us, it helps me remember why they choose to work with us.”
- “The regular check-ins with the leadership team provide a great forum for us to discuss our purpose and issues that make it harder to live it.”

What current systems, processes, and routines need to be revised or adapted to better achieve your purpose? (All team comments)

- “Our promotion and feedback systems seem to ignore values – so many people who don’t care about our broader purpose seem to get promoted.”
- “We need to fix some of our supplier relationships if we really want to drive the next wave of sustainable sourcing – I think customers are going to demand it in the near future.”
- “Our feedback system is only really used once a year, and I think that makes it harder to get sustained discussion and feedback on how we’re living our purpose.”

ENGAGE EMPLOYEES' WHOLE-SELF: By engaging the full person at work, excellent organizations gain maximum satisfaction for employees and maximum effort for the organization.

How much do you agree with the following statements? (0 = strongly disagree, 10 = strongly agree)



INSIGHT: Your team agrees most with the statement, “people work here because they have to not because they want to.” Your team agrees least with the statement, “I don’t have friends at work.” Overall, your team’s responses indicate a general weakness in this area. To continue to develop your capability for engaging employees’ whole-self, use the results in this report to identify where your biggest opportunities lie. Think about: 1) what factors contribute most to your team’s experience, 2) how you might foster a culture of better dialogue and trust, and 3) how incentives and other systems might be shaping the environment in ways that are counter-productive. How might you modify your current practices to improve this discipline?

What is the organization doing well to support employees' whole self? (All team comments)

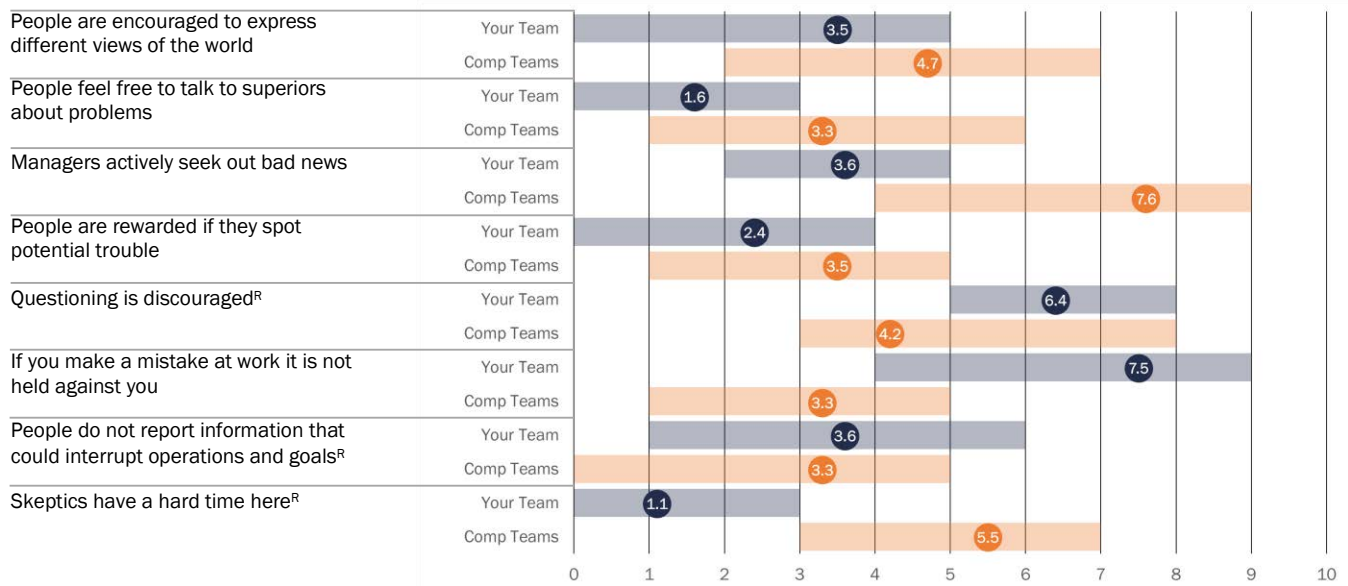
- "I appreciate the maternity leave – many of my friends in other companies have to choose between being a good parent and a good employee – I'm lucky that I have the time to do both."
- "My team really cares about me and has been encouraging me with some of my personal life goals – I don't think I would have made it as far as I have without their support."
- "I like that at many company events, we get to meet each other's families and significant others. It really helps to get a better picture of my colleagues."

What are the biggest barriers to more creativity and engagement at work? (All team comments)

- "My supervisor doesn't have the time to check in with me about my job responsibilities let alone my life. I don't think she really knows much about me, but my sense is that is because she is overworked, not because she doesn't care."
- "I think we have a very hard time talking about gender at our organization. I can see that it's having an impact on many of my colleagues' ability to thrive here."
- "The tight deadlines we have make it really hard to think about anything other than work. It seems we jump from fire to fire and never get to catch our breath."
- "I don't really know how to be creative, and I suspect that many on my team are the same. Maybe some training to give us some more tools and techniques around creativity would help?"

CREATE AN ENVIRONMENT FOR LEARNING: Excellence requires learning quickly. Creating a safe and welcome environment for different perspectives maximizes learning that leads to reliable and effective action.

How much do you agree with the following statements? (0 = strongly disagree, 10 = strongly agree)



INSIGHT: Psychological safety is a crucial ingredient to more honest, direct, and useful feedback that can help organizations learn about opportunities for growth and mitigate risks. Your team agrees most with the statement, “People are rewarded if they spot potential trouble.” Your team agrees least with the statement, “people are free to talk to their supervisors about problems.” Overall, your team’s answers to these statements indicate a moderate strength in this discipline. To continue to develop your capacity for creating an environment for learning, use the results in this report to identify where your most significant opportunities lie. Then think about: 1) what signals team members receive that might make them feel less willing to share honest feedback, 2) how you might create mechanisms in your decision-making that make it easier to get honest feedback – e.g., anonymous feedback or time set aside for taking a devil’s advocate position, and 3) be sure to over communicate the importance of direct, honest feedback for the organization to avoid mistakes and seize opportunities. How might you modify your current practices to improve this discipline?

What is the organization doing well to create a psychologically safe environment to maximize learning? (All team comments)

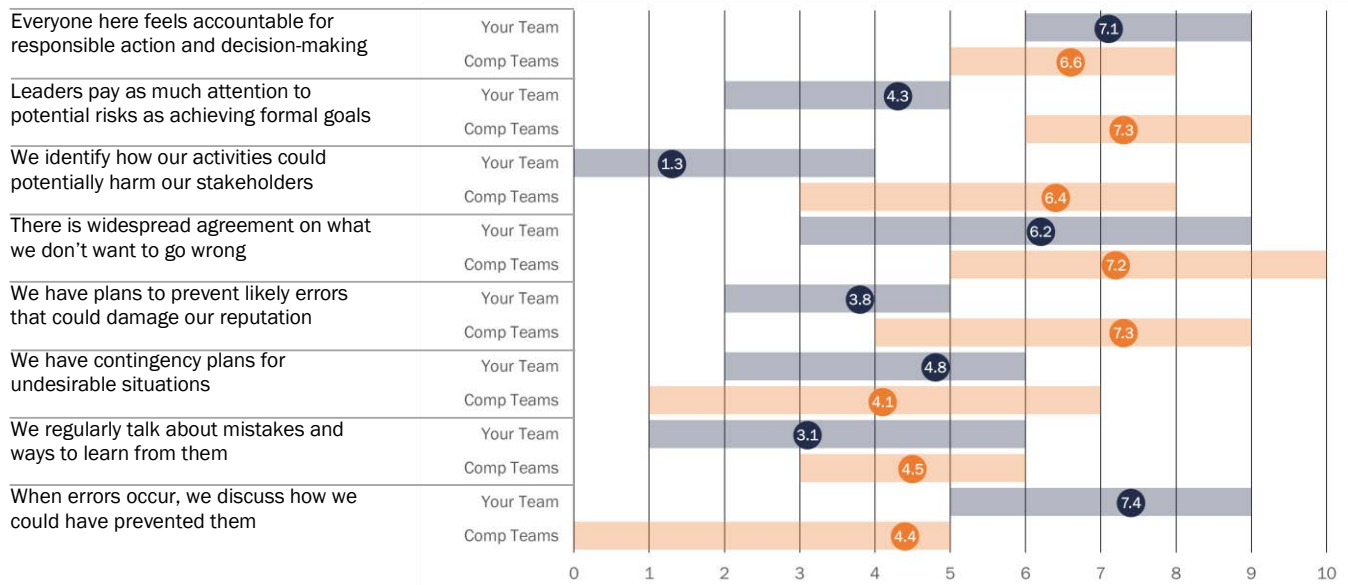
- “We engage outsiders with different perspectives to learn about our blind spots.”
- “I can talk to my colleagues openly about issues of concern.”
- “I like that we have scheduled annual feedback meetings where we can discuss issues and problems.”

What are the biggest barriers to building a more psychologically safe environment to maximize learning? (All team comments)

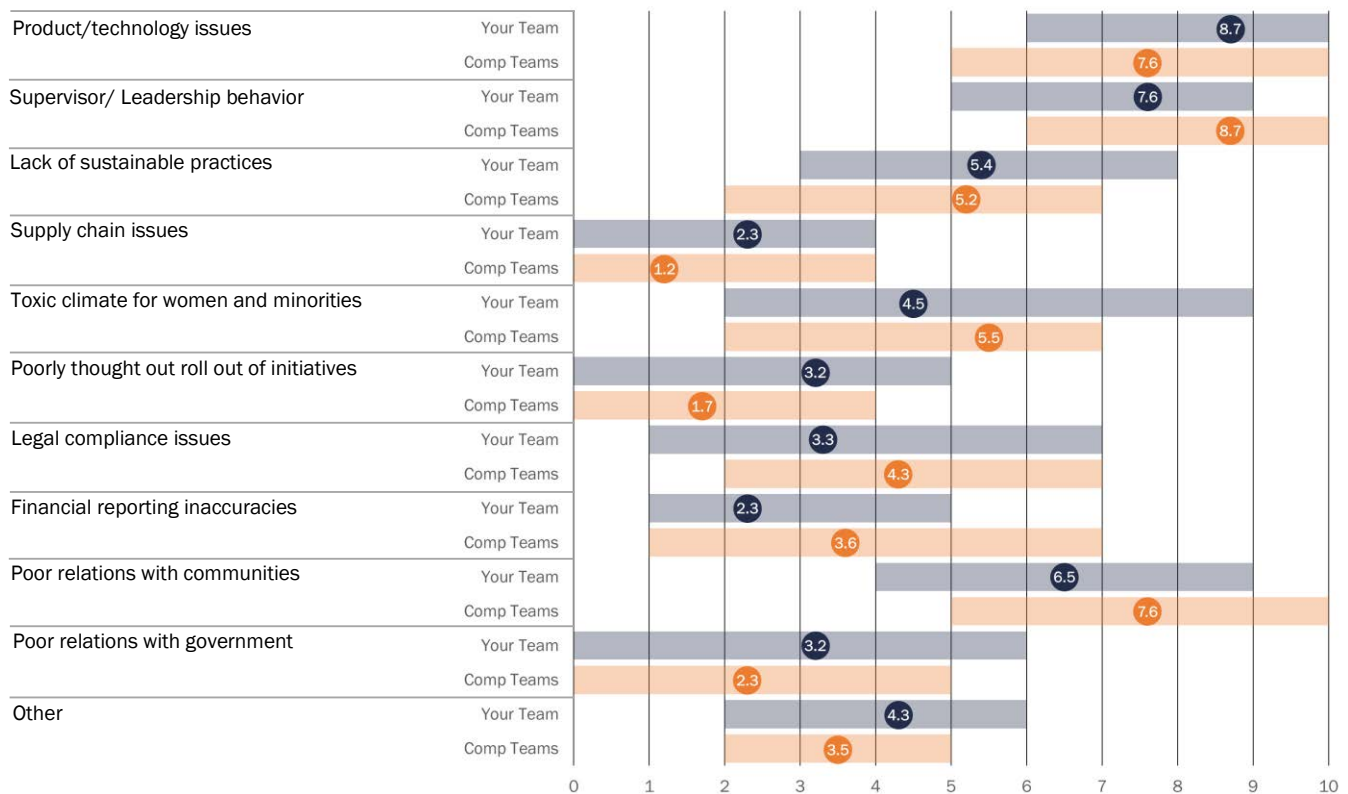
- “I don’t think my boss wants to hear bad news. Even when I bring it up in meetings, my points are usually dismissed as being overly sensitive or cautious. I’ve stopped trying to raise issues.”
- “I notice that in our meetings people don’t raise counter-points or alternate perspectives after they’re on our team for a few months. New comers usually speak up and then it seems like they learn to shut up.”
- “I think our meetings are run in a very unstructured way. If we made explicit and intentional time to look for pitfalls or problems, I think we would be able to anticipate more. Right now, we’re just trying to understand what’s going on and use all our attention to figure out how the meeting is going, rather than on what we can look out for.”

ANTICIPATE AND MITIGATE RISKS: Organizations that can anticipate and plan for risks are less likely to be derailed by unexpected events; research shows that the more teams talk about mistakes, the less likely they are to make them.

How much do you agree with the following statements? (0 = strongly disagree, 10 = strongly agree)



How likely are the following risks to interruption your operations? (0 = not at all likely, 10 = very likely)



INSIGHT: Organizations must be vigilant and proactive to avoid unnecessary risks. Your team agrees most with the statement, “everyone here feels accountable for responsible action and decision-making.” Your team agrees least with the statement, “we identify how activities could potentially harm our stakeholders.” Overall, the average scores for this practice indicate a moderate level of strength. To continue to develop your capability for anticipating and mitigating risks, use the results in this report to identify where your most significant opportunities lie. Think about 1) the balance of your current practice that is focused on identifying and mitigating risks, is this the right amount of time and effort for the risks you face? 2) mechanisms to share mistakes and avoid errors, and 3) how you can better monitor and prevent risks going forward. How might you modify your current practices to improve this discipline?

Additionally, your team is least concerned with the following three areas for risk, “product/technology issues, leadership behavior, and poor relations with communities. Your team is most concerned with, “financial reporting accuracy, supply chain issues, and poor relations with the government. These may be good starting points for risks to assess and manage carefully. As next steps, you’ll want to understand why your team perceives those areas as risky, evaluate the likelihood of those risks and the potential impact to the organization and team. Then create mitigation plans, gain acknowledgment from relevant internal leadership about those risks and start to implement your mitigation plans and monitor progress with regular assessments.

What leading indicators should your organization be paying attention to, to anticipate potential vital issues at work better? (All team comments)

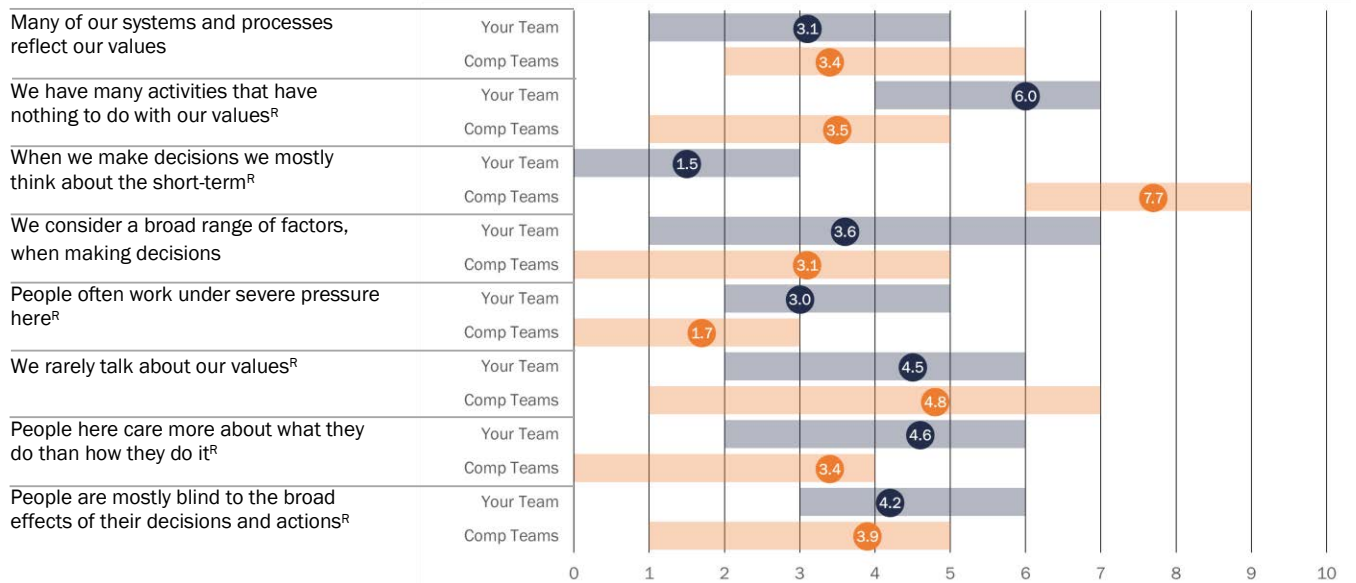
- “I think we need to involve customers and community members earlier in the technology development process, if we identify issues too late, we’re less likely to do something about it.”
- “We should pay attention to the people who choose not to work at our company, that we give offers to. Is there something we can learn about why they turn us down?”
- “There are several community blogs and Reddit pages that complain about our organization – we should be paying attention to what folks are saying on there so that we don’t make things worse.”

What can be improved about how your organization anticipates and prepares for potential risks? (All team comments)

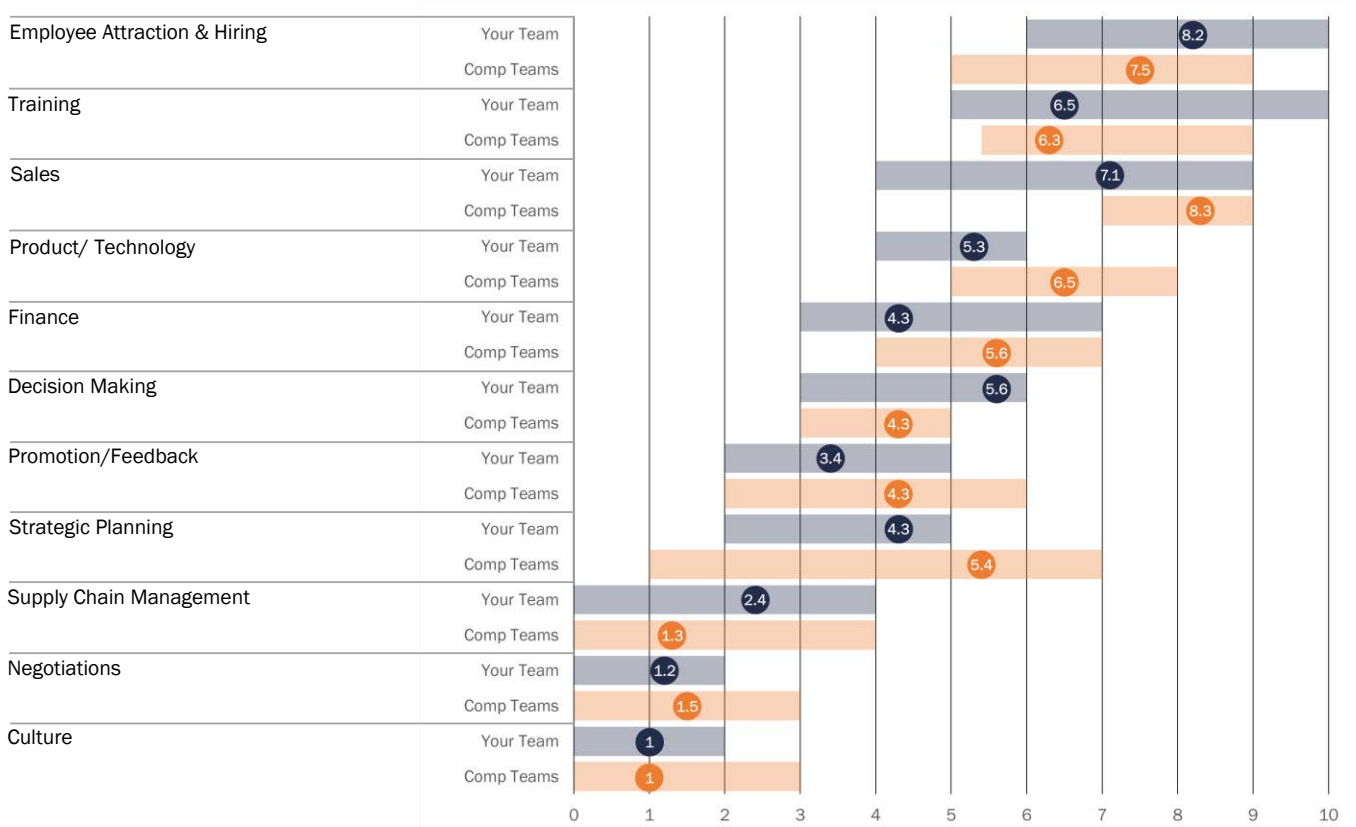
- “I think we need to take time to think about the risks more carefully, when we make product decisions – I don’t think we accurately reflect our customer’s values in that process.”
- “I have no idea what we would do if something went wrong and customers protested our products. I think we should talk about some things we could do ahead of time.”
- “There is so much pressure here to grow, people are not incentivized to see any risks. Seeing risks means foregoing your bonus. If we want to take risks seriously, we need to change what we reward.”

ALIGN OPERATIONS AND VALUES: Significant gaps between what you say you value and how you actually carry out your operations can cause poor performance, decrease trust, and make it harder to detect potential problem areas early.

How much do you agree with the following statements? (0 = strongly disagree, 10 = strongly agree)



Which systems and practices most strongly reflect your stated organizational values? (0 = no relation to our values, 10 = strong relation to our values)



INSIGHT: When your organizational processes do not reflect your values, the risk that something could go wrong increases, and you are less able to achieve your purpose and goals. Your team agrees most with the statement, “we have many activities that have nothing to do with our values.” Your team agrees least with the statement, “when we make decisions we focus mostly on the short-term.” Overall, the average responses on your team indicate a strength in this discipline. To continue to develop your capability for aligning your operations and values, use the results in this report to identify where your most significant opportunities lie. Think about: 1) places where there are the most significant gaps between your values and how you operate, what are the likely outcomes of that gap? 2) think through options for closing that gap by redesigning the systems in question to reflect your values, 3) test changes in your processes to see if they do indeed improve the connection with your values before scaling.

Additionally, your team perceives that employee attraction/hiring, supply chain management, and financial management are most aligned with your values. Your team perceives that the overall culture, practices for negotiation, and decision making are least aligned with your values. These may be good starting points for systems and processes to examine in more depth. How might you be able to better embed your values into those processes and systems?

Where are there misalignments in systems that prevent you from living your values better? (All team comments)

- “Our incentives are not aligned with how we want to portray ourselves with potential partners – I’d like to find win/win solutions but to make my numbers I end up being less collaborative. I get the sense that if some customers had viable alternatives to working with us, they would take it.”
- “Our culture is very macho and testosterone driven – it’s harder to square that with our stated values, but if we don’t I think we’ll follow Uber.”
- “We want to better understand our stakeholders and spend time with them, but culturally time away from your desk is not valued the same as time away. If I took a half day to spend with customers, my team would think I wasn’t doing ‘real’ work.”

What general issues do you need to address better as an organization to become excellent? (All team comments)

- “Pay inequity between men and women.”
- “Growing interest from our stakeholders around political influence and lobbying. I think soon, we’ll have to justify our activities in that sphere more publicly.”
- “What do we do if someone uses our platform for an immoral cause? How will we respond if for example, Neo-nazis want to use our systems to send cash back and forth for rallies?”

ASSESSMENT DESCRIPTION & PROCESS

The disciplines in this assessment are based on a variety of corroborating research on organizational and team excellence.¹ This report provides a summary of results for the XXXX Team comprised of XX individuals at COMPANY X. The study was conducted over one week from mm/dd/yyyy to mm/dd/yyyy and took participants an average of 15 minutes to complete. The response rate for your team was 98%, and for all comparison teams, it was 98%. In addition to your team whose results are presented here, 15 other teams from COMPANY X also participated, and their aggregated and anonymized results are included as a benchmark where relevant.

This report is designed to generate conversations that will result in better alignment of your team's expectations and practices, and therefore allow you to improve your performance.

So Now What? Some Potential Next Steps

Like an annual physical exam, this analysis provides a broad snapshot of the health of your team's practices. Based on the results of this assessment, you may find one or several of the following paths useful as next steps:

- **Dig Deeper:** Follow up to understand key insights surfaced in this analysis – for example, why might people think their team is not prepared to handle certain risks? What can be done to take advantage of any opportunities identified?
- **Start a Conversation:** Barring any significant team conflicts, you could share the report among the team and talk together about the results to co-create fruitful paths forward.
- **Prioritize High Potential Opportunities:** Identify areas within the team or organization that are strategically important and focus on improving practices there first.
- **Prepare for Impending Changes:** How is your environment changing? How will your current practices be an asset as the environment changes, and how might you need to adapt what you do going forward?
- **Find What Works For You:** The data in this report can be correlated with key performance metrics in the organization. Which practices best predict key performance indicators in your team and across the organization?
- **Pretest → Experiment → Posttest:** Run experiments and interventions to improve your practices and validate your efforts with a pre & post-test.
- **Zoom in on Strategic Practices:** You may want to follow up with more focused analysis such as using ethnography and qualitative coding on certain specific processes to get a better sense of how to improve their practices.
- **Find (& then Mind) the Gap:** The data from this report can be mapped on to organizational charts or network diagrams to see how certain practices are distributed across the organization. For example, if you are working on an initiative to improve the understanding of purpose across the organization, use this data to map practices across the organization and see where you may need to focus your efforts to close any gaps.

¹ Henisz, W. J., Dorobantu, S., & Nartey, L. J. (2014). Spinning gold: The financial returns to stakeholder engagement. *Strategic Management Journal*, 35(12), 1727-1748.
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