PROFITABLE SOLUTIONS™
Institute Inc.

Fast
Assessment and
Action for
Strategic
Transformation

Results & Key Findings
Sample

Executive Assessment Overview

TABLE OF CONTENTS

Results and Key Findings Report Overview

Objectives

1. Identify the "Key Drivers" of your company.
2. Initiate high-level gap analysis of critical issues impeding your success.
3. Elevate level of agreement on critical performance issues.
4. Select gaps to narrow or close.
5. Establish goals and time lines.
6. Align the necessary resources to ensure goal achievement.
7. Set milestones and follow up criteria.

Organization Dynamic Model - Corporate Edition

1.0 Organization Strategy		2.0 Organization Design		3.0 Organization Culture	
1.1 Mission, Vision Competitive Advantage	1.1.1 Focused Purpose 1.1.2 Future Perspective 1.1.3 Strategic Advantage	**2.1 Basic Structure**	2.1.1 Structure Criteria 2.1.2 Structure Evolution	**3.1 Values & Beliefs**	3.1.1 Values Integration 3.1.2 Values Credibility
1.2 External Assessment	1.2.1 Customer Profile 1.2.2 Industry & Competitive Analysis 1.2.3 Environmental Assessment	**2.2 Core Competence**	2.2.1 Identifying Core Competence 2.2.2 Leveraging Core Competence	**3.2 Leadership**	3.2.1 Management Modeling 3.2.2 Strategic/Tactical Balance 3.2.3 Empowerment 3.2.4 Developmental Coaching 3.2.5 Building Effective Teams
1.3 Internal Assessment	1.3.1 Finance 1.3.2 Research & Development 1.3.3 Production 1.3.4 Marketing 1.3.5 Sales/Distribution 1.3.6 Customer Service	**2.3 Information, Systems, & Technology**	2.3.1 Organization Communication 2.3.2 Targeted Information 2.3.3 Enterprising Systems 2.3.4 Applied Technology	**3.3 Human Resource Systems**	3.3.1 Selective Recruitment 3.3.2 Employee Orientation 3.3.3 Continuous Learning 3.3.4 Performance Management 3.3.5 Reward Systems
1.4 Objectives, Initiatives, & Goals	1.4.1 Vital Direction 1.4.2 Resource Alignment 1.4.3 Organization Accountabilities	**2.4 Organization Efficiency**	2.4.1 Balanced Oversight & Direction 2.4.2 Synthesized Roles & Responsibilities 2.4.3 Managed Outsource & Strategic Alliances	**3.4 Organization Character**	3.4.1 Informal Communication 3.4.2 Organization Feedback 3.4.3 Adaptability to Change

Methodology

The assessment employs a six-point interval scale to evaluate your company's performance measured against 189 best-practice statements. Each statement requires a response ranging from "Strongly Disagree" to "Strongly Agree", or the participant may choose a "Don't Know/Not Applicable" response. Responses from all participants are aggregated resulting in performance mean scores.

Additionally, the assessment takes the participants through a critical thinking process that prioritizes the "Key Drivers" of their company within their industry.

The Results & Key Findings report is designed to reflect:

1. Priorities: The areas you and your team view to be the "Key Drivers" of your business.
2. Performance: How you and your team currently view your company's performance in the areas of Strategy, Design, and Culture.
3. Consensus: Your team's degree of agreement or disagreement within each analyzed component.
4. Focus: The areas you and your team view to be both "High-Impact" and "Low-Performance".

Utilization

1. Review the Degree of Impact Summary in order to:

   - Establish a broad understanding of how you prioritized the "Key Drivers" among your Strategy, Design, and Culture.
   - Identify how you rated their performance.

2. Review the detail report pages to validate and gain further understanding of the performance scores.
3. Validate and compare your observations with those of your executive management team.
4. Select your top three to five issues, define solutions, and craft an action plan to improve performance.
5. Six to twelve months' later re-take the assessment and benchmark against previous results.
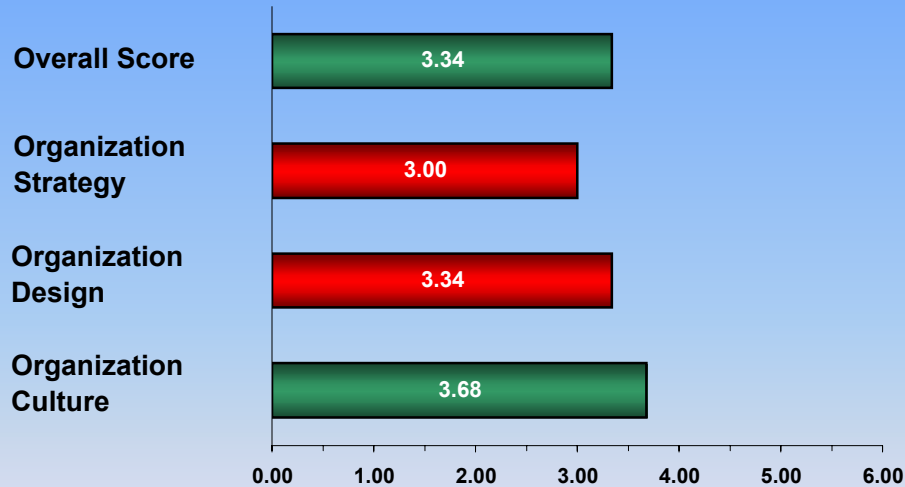
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Lynn Marie Hoopingarner, CMC MIB   President

Organization Strategy, Organization Design, & Organization Culture

The Executive Summary is designed to highlight the key findings within each of the critical areas of your Organization's Strategy, Design, and Culture. The specific detail necessary for meaningful dialogue and debate will follow on the subsequent pages.

Organization Strategy, Organization Design, & Organization Culture

Area	Score
Overall Score	3.34
Organization Strategy	3.00
Organization Design	3.34
Organization Culture	3.68

0.00 1.00 2.00 3.00 4.00 5.00 6.00

Understanding the Results & Key Findings

The scores reflected in the graph to the left represent your total input into the Executive Assessment. Scores are derived from your input as measured by the following six point interval scale: 1=Strongly Disagree, 2=Disagree, 3=Somewhat Disagree, 0=Don't Know/Not Applicable, 4=Somewhat Agree, 5=Agree, 6=Strongly Agree. The "Don't Know/Not Applicable" response is not calculated in the overall performance score. The scores to the left represent the "mean" score for each respective area of Strategy, Design, & Culture.

Methodology: The following pages illustrate your impressions of the company's performance in the critical areas of Organization Strategy, Organization Design, and Organization Culture. The summary scores are listed below. There are three review components in the following pages:

Average Score - The left graph represents the average score based on the total responses covering that element. Red represents scores **under** the "mean" of your total response within that section, and green represents scores **above** the "mean".

Level of Awareness/Agreement - The second graph reflects either your level of awareness or your level of agreement or disagreement with the assessment statements. Red represents "Disagreement", Gold represents "Don't Know/Not Applicable", and Green represents "Agreement".

Areas of Focus - The Areas of Focus statements generally define what was being assessed and provide the foundation for targeted dialog and action planning.

Organization Strategy		Organization Design		Organization Culture	
1. Mission, Vision, & Competitive Advantage	4.66	1. Basic Structure	3.46	1. Values & Beliefs	3.62
2. External Assessment	2.96	2. Core Competence	3.46	2. Leadership	3.99
3. Internal Assessment	2.82	3. Information, Systems, & Technology	3.25	3. Human Resource Systems	3.08
4. Objectives, Initiatives, & Goals	2.47	4. Organization Efficiency	3.39	4. Organization Character	4.25

These Assessment highlights illustrate both the high performing and low performing areas that have been identified as currently having higher impact to the organization. These tables include items in ranked order within the areas of Strategy, Design and Culture and include their individual performance score. This summary can serve as an initial discussion point of the assessments key findings.

HIGH IMPACT - HIGH SCORE

	Strategy				Design				Culture		
#	Principal Elements	Impact	Perf.	#	Principal Elements	Impact	Perf.	#	Principal Elements	Impact	Perf.
1	Focused Purpose	64.00%	5.41	1	Identifying Core Competence	74.55%	3.45	1	Building Effective Teams	90.67%	4.04
2	Research & Development	62.67%	3.73	2	Leveraging Core Competence	60.00%	3.47	2	Empowerment	69.33%	4.45
3	Strategic Advantage	58.67%	4.15	3	Applied Technology	54.55%	4.40	3	Developmental Coaching	56.00%	4.90
4	Production	54.67%	3.38								

Strategy Impact Count:	4
Design Impact Count:	3
Culture Impact Count:	3
Total High Score Impact Count:	10

HIGH IMPACT - LOW SCORE

	Strategy				Design				Culture		
#	Principal Elements	Impact	Perf.	#	Principal Elements	Impact	Perf.	#	Principal Elements	Impact	Perf.
1	Sales & Distribution	81.33%	2.52	1	Balanced Oversight & Direction	78.18%	3.11	1	Management Modeling	74.67%	3.50
2	Marketing	78.67%	2.72	2	Synthesized Roles & Responsibilities	70.91%	3.05	2	Performance Management	69.33%	2.84
3	Finance	65.33%	2.13	3	Organization Communication	52.73%	3.27	3	Values Integration	65.33%	3.60
4	Resource Alignment	60.00%	1.93					4	Strategic/Tactical Balance	60.00%	3.07
								5	Values Credibility	58.67%	3.63

Strategy Impact Count:	4
Design Impact Count:	3
Culture Impact Count:	5
Total Low Score Impact Count:	12

ORGANIZATION STRATEGY

Degree of Impact

This report plots the Principal Elements within Organization Strategy. Each element reflects your view of their degree of impact on the company's ability to achieve its strategic intent. The vertical axis represents the performance mean score and the horizontal axis represents the order of priority. The table to the right reflects the Principal Elements in order of weighted priority and lists the performance mean score.
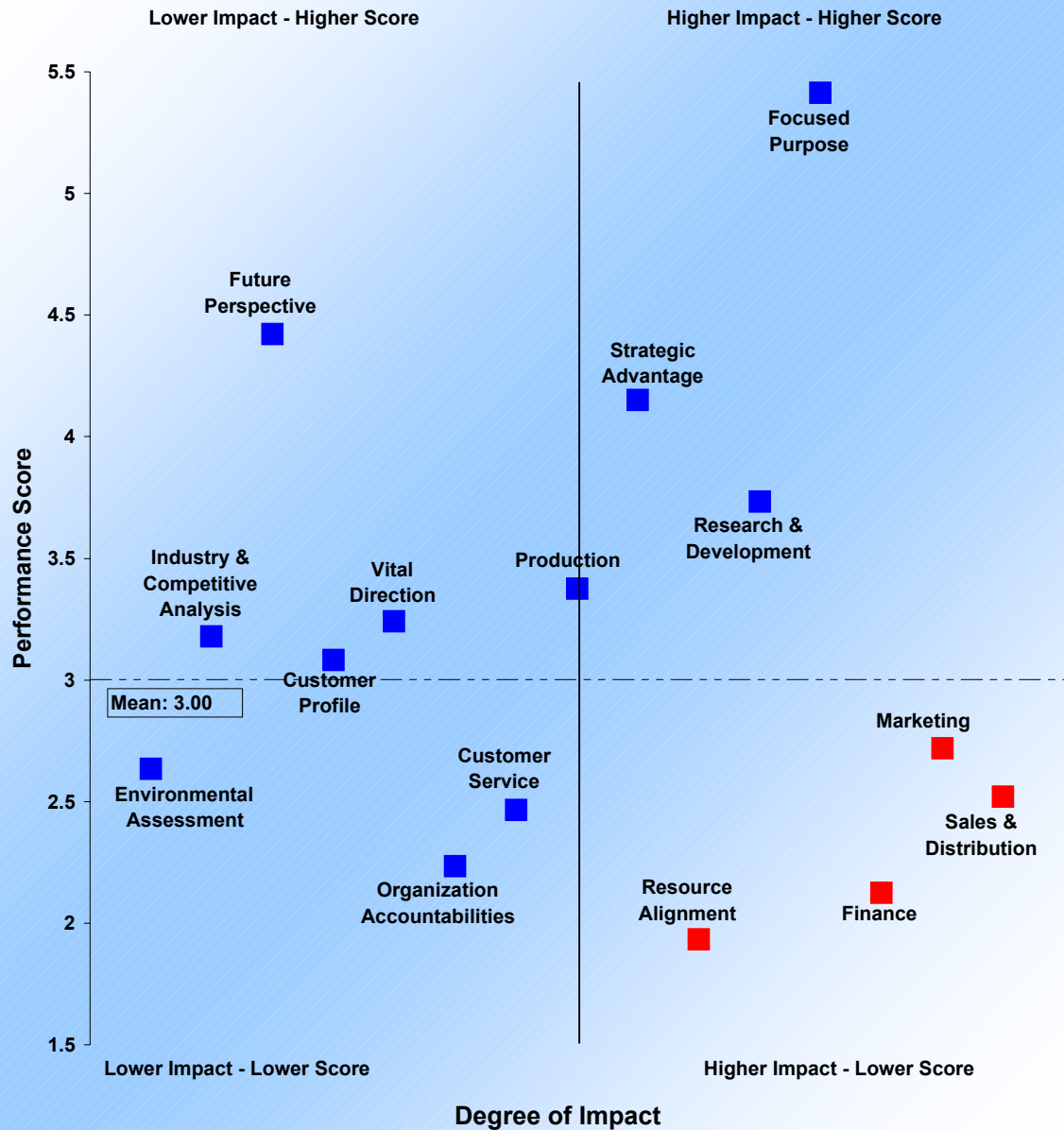
#	Priorities	Impact	Perf.
1	Sales & Distribution	81.33%	2.52
2	Marketing	78.67%	2.72
3	Finance	65.33%	2.13
4	Focused Purpose	64.00%	5.41
5	Research & Development	62.67%	3.73
6	Resource Alignment	60.00%	1.93
7	Strategic Advantage	58.67%	4.15
8	Production	54.67%	3.38
9	Customer Service	52.00%	2.46
10	Organization Accountabilities	48.00%	2.23
11	Vital Direction	46.67%	3.24
12	Customer Profile	44.00%	3.08
13	Future Perspective	44.00%	4.42
14	Industry & Competitive Analysis	22.67%	3.18
15	Environmental Assessment	17.33%	2.63

Lower Impact - Higher Score

Higher Impact - Higher Score

Performance Score

Focused Purpose

Future Perspective

Strategic Advantage

Research & Development

Industry & Competitive Analysis

Vital Direction

Production

Customer Profile

Mean: 3.00

Marketing

Environmental Assessment

Customer Service

Sales & Distribution

Organization Accountabilities

Resource Alignment

Finance

Lower Impact - Lower Score

Higher Impact - Lower Score

Degree of Impact

5.5
5
4.5
4
3.5
3
2.5
2
1.5

This report plots the Principal Elements within Organization Design. Each element reflects your view of their degree of impact on your company's ability to achieve its strategic intent. The vertical axis represents the performance mean score and the horizontal axis represents the order of priority. The table to the right reflects the Principal Elements in order of weighted priority and lists the performance mean score.
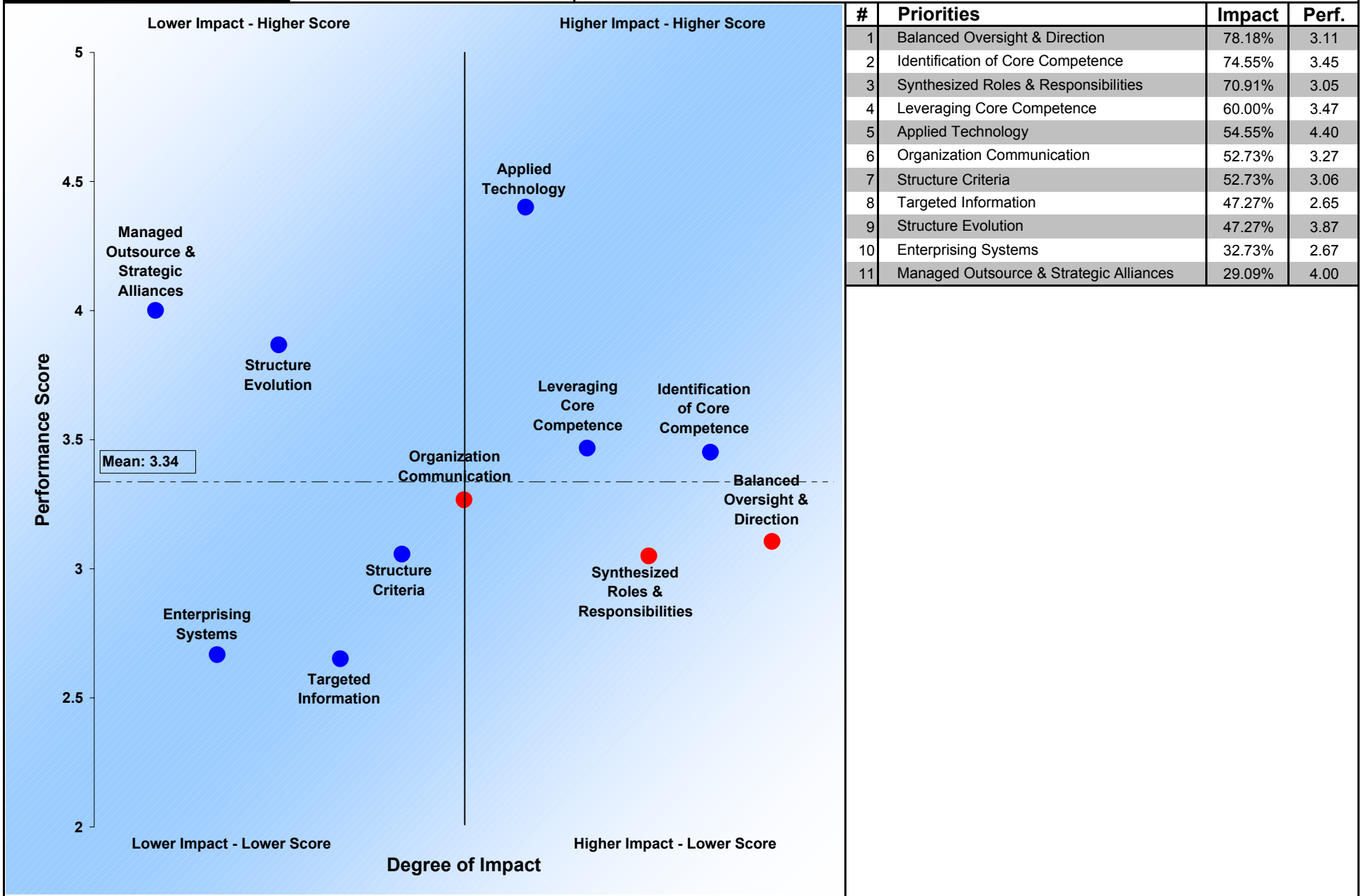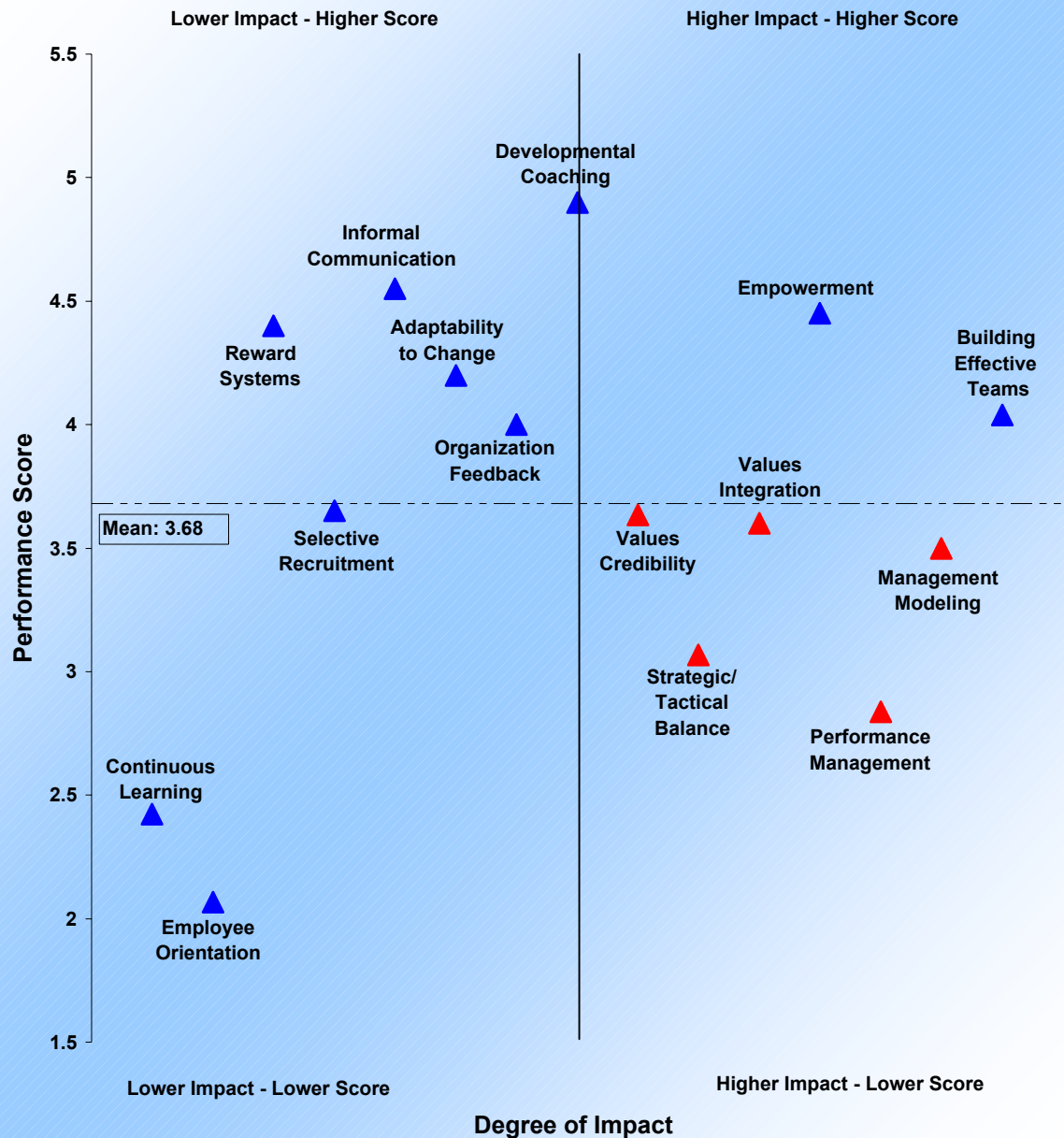
#	Priorities	Impact	Perf.
1	Balanced Oversight & Direction	78.18%	3.11
2	Identification of Core Competence	74.55%	3.45
3	Synthesized Roles & Responsibilities	70.91%	3.05
4	Leveraging Core Competence	60.00%	3.47
5	Applied Technology	54.55%	4.40
6	Organization Communication	52.73%	3.27
7	Structure Criteria	52.73%	3.06
8	Targeted Information	47.27%	2.65
9	Structure Evolution	47.27%	3.87
10	Enterprising Systems	32.73%	2.67
11	Managed Outsource & Strategic Alliances	29.09%	4.00

Lower Impact - Higher Score   **Higher Impact - Higher Score**

Performance Score

- Applied Technology
- Managed Outsource & Strategic Alliances
- Structure Evolution
- Leveraging Core Competence
- Identification of Core Competence
- Organization Communication
- Balanced Oversight & Direction
- Structure Criteria
- Synthesized Roles & Responsibilities
- Enterprising Systems
- Targeted Information

Mean: 3.34

Lower Impact - Lower Score   **Higher Impact - Lower Score**

Degree of Impact

ORGANIZATION CULTURE

Degree of Impact

This report plots the Principal Elements within Organization Culture. Each element reflects your view of their degree of impact on your company's ability to achieve its strategic intent. The vertical axis represents the performance mean score and the horizontal axis represents the order of priority. The table to the right reflects the Principal Elements in order of weighted priority and lists the performance mean score.
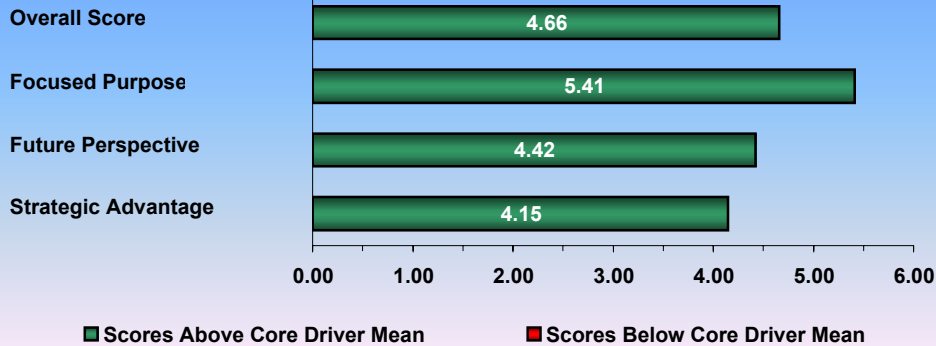
#	Priorities	Impact	Perf.
1	Building Effective Teams	90.67%	4.04
2	Management Modeling	74.67%	3.50
3	Performance Management	69.33%	2.84
4	Empowerment	69.33%	4.45
5	Values Integration	65.33%	3.60
6	Strategic/Tactical Balance	60.00%	3.07
7	Values Credibility	58.67%	3.63
8	Developmental Coaching	56.00%	4.90
9	Organization Feedback	49.33%	4.00
10	Adaptability to Change	46.67%	4.20
11	Informal Communication	41.33%	4.55
12	Selective Recruitment	36.00%	3.65
13	Reward Systems	30.67%	4.40
14	Employee Orientation	28.00%	2.07
15	Continuous Learning	24.00%	2.42

Scatter plot titled "Degree of Impact" with vertical axis "Performance Score" (1.5 to 5.5) and horizontal axis "Degree of Impact". Quadrant labels: Lower Impact - Higher Score; Higher Impact - Higher Score; Lower Impact - Lower Score; Higher Impact - Lower Score. Mean: 3.68. Plotted elements: Developmental Coaching, Informal Communication, Empowerment, Reward Systems, Adaptability to Change, Building Effective Teams, Organization Feedback, Values Integration, Selective Recruitment, Values Credibility, Management Modeling, Strategic/Tactical Balance, Performance Management, Continuous Learning, Employee Orientation.
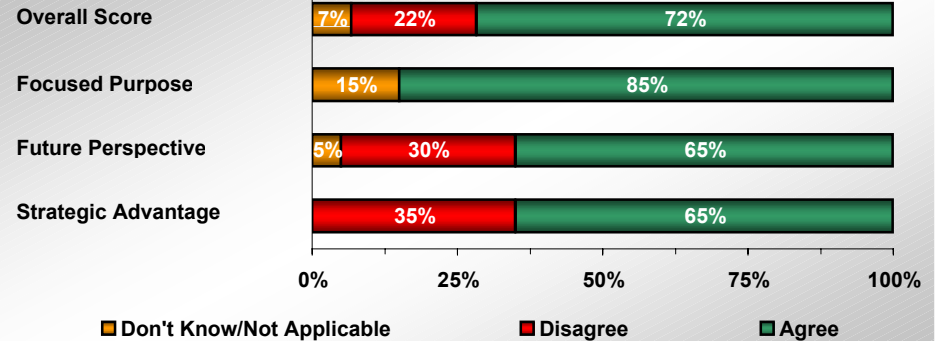
ORGANIZATION STRATEGY	Mission, Vision, & Competitive Advantage	Mission, Vision & Competitive Advantage describe the business a company is in, it's current and long-term market objectives, as well as the manner in which it differentiates itself from the competition.

Mission, Vision, & Competitive Advantage

Category	Score
Overall Score	4.66
Focused Purpose	5.41
Future Perspective	4.42
Strategic Advantage	4.15

■ Scores Above Core Driver Mean ■ Scores Below Core Driver Mean

Level of Awareness/Agreement

Category	Don't Know/Not Applicable	Disagree	Agree
Overall Score	7%	22%	72%
Focused Purpose	15%		85%
Future Perspective	5%	30%	65%
Strategic Advantage		35%	65%

■ Don't Know/Not Applicable ■ Disagree ■ Agree

Note: Due to rounding, the total may not exactly equal 100%

AREAS OF FOCUS

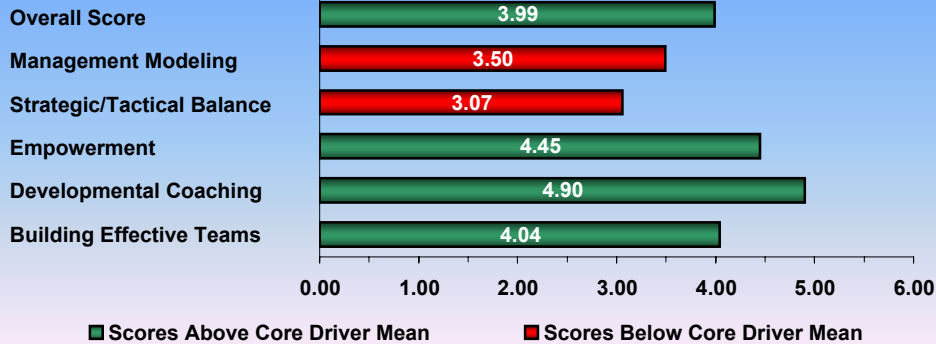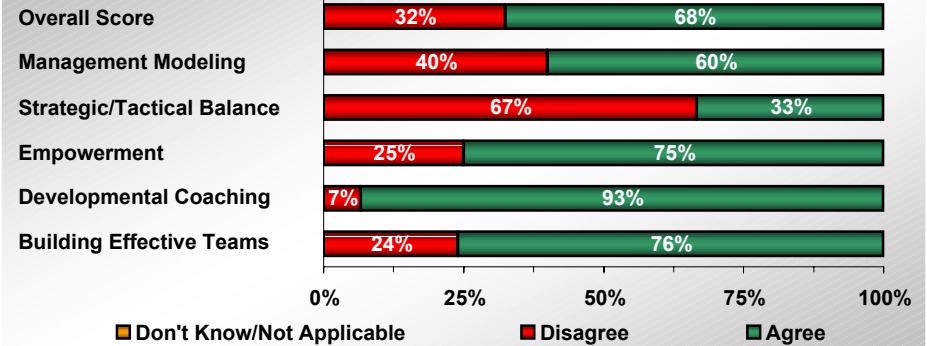| Focused Purpose	Future Perspective	Strategic Advantage
• Clearly defining short-term purpose • Ensuring mission is realistic • Serving the best interests of all stakeholders • Defining a point of differentiation	• Clearly defining long-term outlook • Appealing to the long-term interests of the company's stakeholders • Providing a foundation for decision-making	• Competitive advantage is a key driver to forming strategy • Competitive advantage is clearly understood by all stakeholders • Employees clearly understand how their role supports the company's strategy

ORGANIZATION CULTURE	Leadership	Leadership deals with creating a clearly articulated vision and possessing the skills and the resolve to recruit and develop followers who are committed to carrying out the vision. Having the ability to see the bigger picture and maintaining a balance between high-level strategies and front-line tactics.

Leadership

	Score
Overall Score	3.99
Management Modeling	3.50
Strategic/Tactical Balance	3.07
Empowerment	4.45
Developmental Coaching	4.90
Building Effective Teams	4.04

Scale: 0.00 – 6.00

■ Scores Above Core Driver Mean ■ Scores Below Core Driver Mean

Level of Awareness/Agreement

	Disagree	Agree
Overall Score	32%	68%
Management Modeling	40%	60%
Strategic/Tactical Balance	67%	33%
Empowerment	25%	75%
Developmental Coaching	7%	93%
Building Effective Teams	24%	76%

Scale: 0% – 100%

■ Don't Know/Not Applicable ■ Disagree ■ Agree

Note: Due to rounding, the total may not exactly equal 100%

AREAS OF FOCUS

Management Modeling	Strategic/Tactical Balance	Empowerment	Developmental Coaching	Building Effective Teams
• Management "walks-the-talk" • Managers are viewed as role models • Management styles are aligned with values and consistent across division/departments • High level of confidence in senior leadership • Senior managers are viewed as honest and ethical	• Tactical and strategic skills among managers are equally emphasized • Line managers understand the "big picture" • Managers understand the broader implications of their decisions • Managers can effectively communicate the company's strategic plan to their staff	• Balancing authority and control • Encouraging employee involvement • Decisions made without unnecessary or authoritarian approval process • Decisions driven to the lowest appropriate level	• Delegation is a motivational tool • Managers consider employee's self-esteem during coaching/counseling • Managers take the time to recognize a job well done • Managers encourage initiative • Coaching is viewed as developmental vs. punitive • Employee goals/aspirations are taken into consideration	• Managers promote teamwork • Team participants are excited about and committed to their goals and objectives • Cross-functional communication is promoted • Meetings are well planned and highly participative