Sample Discovery Report
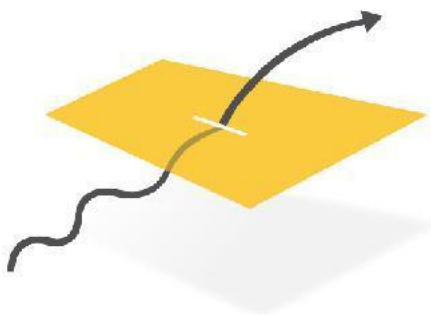
We asked 12 managers and owners at Sample Company to answer 40 questions, which were scored against 10 thematic categories to identify areas of potential improvement.

This report will begin with a summary of results and overall observations. The 10 categories, the question we use to define each, and the biggest drivers of each score are detailed below the summary of results.

SUMMARY OF RESULTS:

Existing Strengths:

Strategy:	70
Competitive Edge:	65
Continuous Improvement:	62
Engagement:	60

Areas of Concern:

Policies and Structures:	38
Leadership:	42
Quality of Supervision:	44

Opportunities for Strength:

Participation:	53
Organizational Environment:	52
Teamwork and Cooperation:	52

What do our scores mean?

- A score of 50 represents average (unlikely to be helping or hurting the organization substantially)

- A score below 40 suggests the presence of serious issues (which could have spillover effects impacting other aspects of the organization)

- A score above 60 indicates an area of organizational strength (we expect organizations with scores above 60 across the board are thriving and well positioned for growth)

PROFESSIONAL GROWTH SYSTEMS
Realize Potential
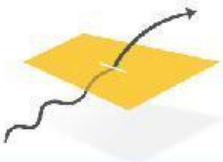
🔗 Strengths:

- Strategy and execution for delivering products and services to external customers

- Effectively meeting the needs of today's customers

- Changing to respond to shifting needs and priorities of customers without sacrificing operational quality and efficiency

- Sample Company is a highly enjoyable place to work

- Leadership has set a positive tone

- Employees feel supported and know what is expected of them

🔀 Concerns:

- People management leaves room for improvement

- Employees (managers) lack clarity on roles and org structure

- Even though people know which specific outputs are expected from them, they don't know (as well) how they fit into the organization as a whole or feel noticed for producing better or worse results

- Communication could be improved at multiple levels

- Communications from leadership aren't clear or motivating

- Managers feel they cannot count on leadership to be transparent and/or consistent

- Problems aren't always addressed, excellent productivity is insufficiently recognized/rewarded

🔍 Other Observations:

On a significant majority of questions, managers and owners gave a similar distribution of answers, however, there were three exceptions where all owners responded positively but multiple managers responded negatively.

- I get timely decisions where I don't have authority

- Our performance is consistent and high quality

- We are managing the performance of our people well
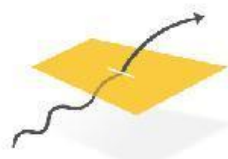
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STRATEGY

Does the organization have a sound pathway for maintaining and and growing market share or stakeholder support?
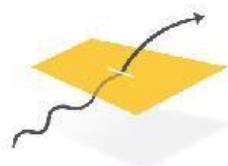
Sample Company Score: 70

🔗 Strengths:

Unanimous agreement that Sample Company has the right products and services to be successful. All but one respondent agreed that you hire the right people, understand and respond to changing needs of customers, and change the right amount.

Opportunities:

Half of respondents felt that Sample Company fails to confront the tough issues.

COMPETITIVE EDGE

How well do we maintain product and service characteristics that outperform our competitors.
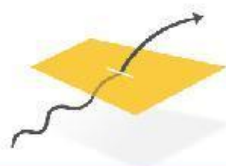
Sample Company Score: 65

Strengths:

Unanimous agreement that Sample Company has the right products and services to be successful and that respondents value/enjoy the corporate culture. All but one respondent agreed they were clear on the strategy for continued viability, that Sample Company understands and responds to the changing needs of customers, and that respondents feel free to be honest about concerns.

Opportunities:

Only half of respondents felt the organizational structure is appropriate and effective, two thirds felt the organization is optimizing the use of technology, and only half feel Sample Company is confronting its toughest issues.

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CONTINUOUS IMPROVEMENT

Does the organization maintain ongoing efforts to identify and achieve improvement in quality, cost, and service.

Sample Company Score: 62

Strengths:

Unanimous agreement that we are continually improving systems and processes, all but one respondent agreed Sample Company's systems and processes support me in being productive, we change the right amount, and we understand and respond to changing needs of customers/market

Opportunities:

Half of respondents disagreed that we confront the tough issues, and a third felt Sample Company fails to optimize technology or train people to be productive quickly.
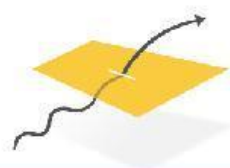
ENGAGEMENT

How committed are employees to the purpose, vision, values, and goals of the organization? (Relates directly to employees commitment to remain with your organization)
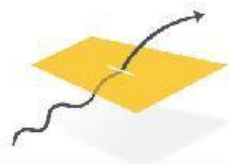
Sample Company Score: 60

Strengths:

Unanimous positive responses to enjoying/valuing your corporate culture and having needed data/resources. All but one positive responses to Sample Company supports my personal and professional development and I feel free to be honest about my concerns

Opportunities:

More than a third of respondents expressed a lack of feedback, insufficient training/onboarding, uncertainty that leadership will be forthright, and that communications from leadership weren't informative and/or motivating.

CATEGORY SCORES AND MAJOR CONTRIBUTORS

Policies and Structures - Do the defined roles, authorities, and procedural rules support efficient and effective operations?
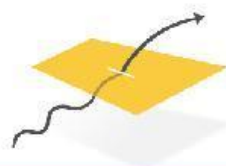
Sample Company Score: 38

Strengths:

Most respondents are clear on what is expected of them and reported having the information, resources, and authority they need to meet expectations.

Opportunities:

Half of all respondents reported not receiving credit or rewards for the good results they produce, half agreed the organizational structure is appropriate and effective (others were 2/2 on uncertain and sure it is not), more than a third do not feel training systems bring employees up to speed easily and quickly or that communications from leadership are clear, informative, and motivating.

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LEADERSHIP

How strong are the functions for setting future direction and managing execution?
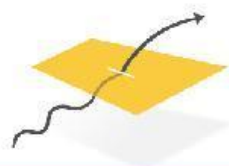
Sample Company Score: 42

🔗 Strengths:

All respondents believe Sample Company has the products and services necessary for success. All but one respondent felt Sample Company changes the right amount (not too much or too little), and respondents unanimously agreed that Sample Company is continuously improving. At least 75% of respondents felt expectations are clear, sufficient authority is delegated, and decisions from leadership are timely when the authority hasn't been delegated.

Opportunities:

More than half of respondents reported that Sample Company does not confront its most difficult problems, that policies and procedures are unclear or inconsistently applied, that communications from leadership are not clear, informative, and motivating, and that they cannot count on leadership to do what they say and say what they do. Half of all respondents reported not receiving credit or reward for the good results they produce.

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QUALITY OF SUPERVISION

To what extent are people managers adding value to the organization by improving employee performance?
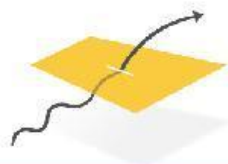
Sample Company Score: 44

Strengths:

Respondents unanimously felt they had the information and resources they need to meet expectations, and generally agreed that those expectations are clear.

Opportunities:

While expectations were reportedly quite clear, respondents' understanding of their roles within the organization were not. Half of all respondents felt they are not acknowledged or rewarded for their positive results and more than a third reported not receiving feedback on their results. More than a third of respondents also felt policies and procedures are unclear or inconsistently applied, and that existing training (including onboarding) fails to support employees becoming productive quickly and easily.

PARTICIPATION

Are employees involved in setting direction, identifying and solving problems, and making improvements?
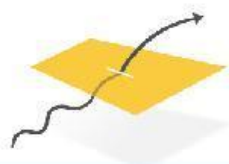
Sample Company Score: 53

Strengths:

Strong majorities of respondents felt they have sufficient authority, are clear on their potential career path in the company, and feel free to be honest about their concerns

Opportunities:

More than a third of respondents felt they could not count on leadership to be transparent and forthright, a similar number expressed a lack of meaningful feedback

# ORGANIZATIONAL ENVIRONMENT

Sample Company Score: 52

Strengths:

Respondents unanimously believe in, value, and/or enjoy Sample Company's corporate culture. Broad belief the organization hires the right people, and that existing employees feel personally supported by Sample Company .

Opportunities:

Lack of clarity or consistency around supervision, lack of feedback on individual employees results, and lacking communications from leadership limit the ceiling on what being a fun/pleasant place to work can accomplish for Sample Company's work environment.
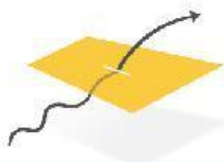
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TEAMWORK AND COOPERATION

How much do individuals and groups within the organization view others in the organization as internal customers whose needs must be met and whose input is valuable.
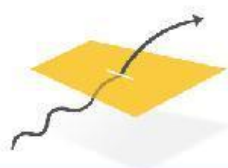
Sample Company Score: 52

Strengths:

All but one respondent felt the systems and processes at Sample Company support them in being productive and that we hire the right people, 10 of 12 respondents believe performance is consistent and high quality and that customer service is above average.

Opportunities:

Only half of respondents felt they get credit for good results, more than a third felt they could not count on leadership to be transparent and forthright, more than a third expressed a lack of meaningful feedback