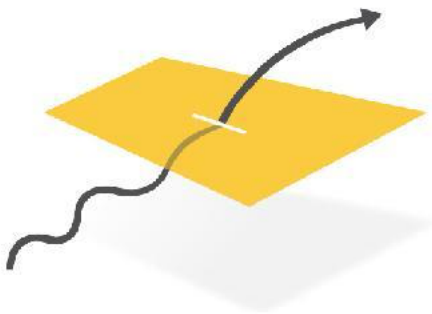


# Sample Discovery Report



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We asked 27 staff, managers and owners at Sample Company to complete a Discovery Survey for the organization. The survey included 31 questions used to identify organizational strengths and areas with the potential to improve. The questions were scored under 3 main categories, each made up of 3 subcategories. Most questions impacted the overall score on several subcategories, with many also influencing two main category scores.

This report lays out overall category scores for the organization as well as a comparison of scores between respondents based on role and location of shop. There were also 5 free response questions included in the Discovery Survey. The answers given to those questions follow the scoring section of this document.

## **Category and Subcategory Scores:**

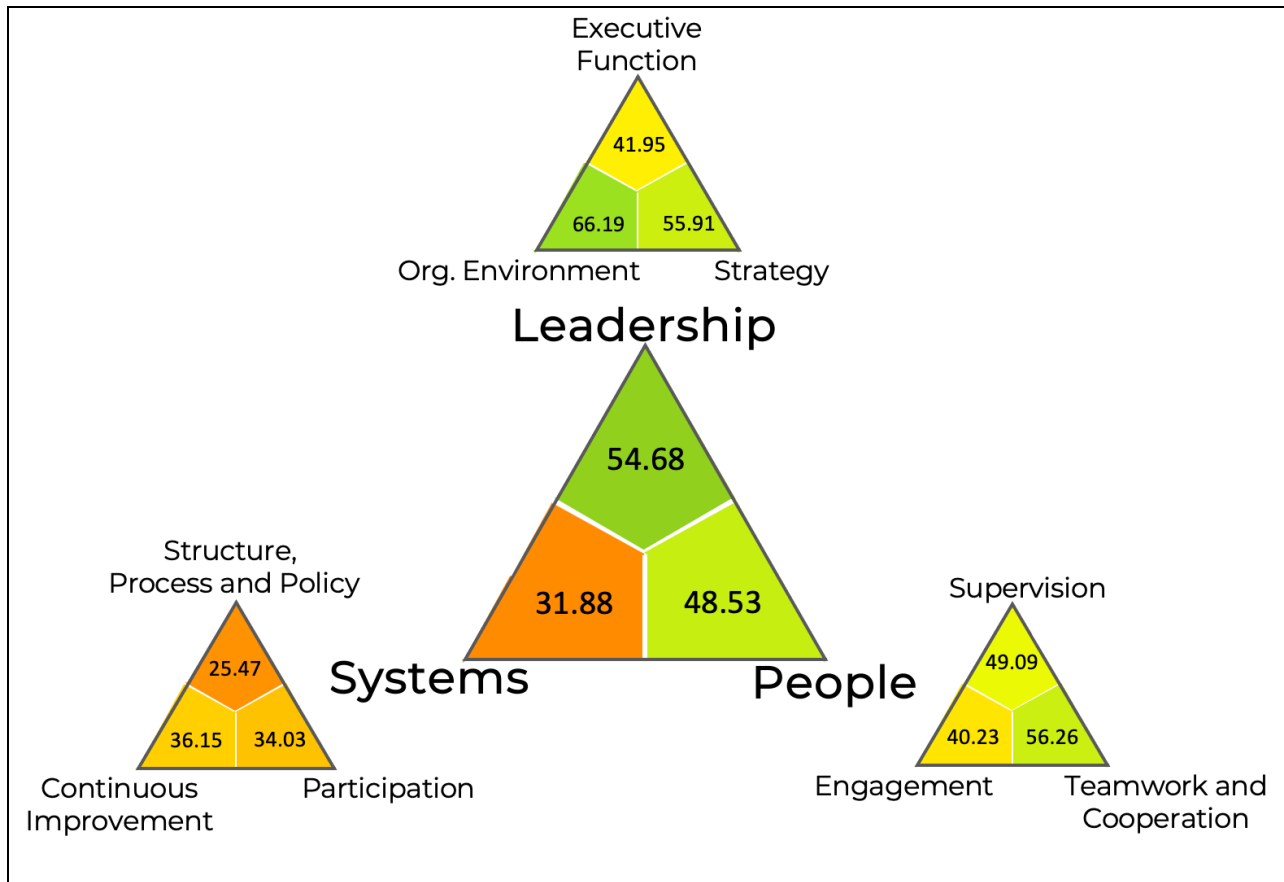
The quality of each of the three key categories - Leadership, Systems and People – and the healthiness of their interrelationships will determine the effectiveness of the organization and its ability to reach its long-term vision successfully. Each overall category is made up of 3 subcategories to better delineate the scores.

### **What do the scores mean?**

Scores are shown as a percentage of the points possible in a category or subcategory. Each question on the Discovery survey is given a score and then is weighted by 5 to 10 points for a positive response and -5 to -10 for a negative response. The points for all respondents are totaled and a percentage of possible points computed for each category.

- A score above 55% indicates an area of significant organizational strength (we expect organizations with scores above 55 across the board are thriving and well positioned for growth).
- A score of 40%-55% is an average score, meaning that category is unlikely to be helping or hurting the organization substantially.
- A score below 40% suggests the presence of potential issues (which could have spillover effects impacting other aspects of the organization. Scores can range to -100% if all respondents answer negatively to each of the questions feeding into that category or subcategory's score.





## Category Definitions

- **Leadership:** Defining what needs to be done and assuring that it is done. Includes the culture of the organization.
  - **Executive Function:** How strong is establishing future direction and managing execution?
  - **Strategy:** Does the organization have a sound pathway for maintaining and growing market share or stakeholder support?
  - **Organizational Environment:** Does working here feel good?

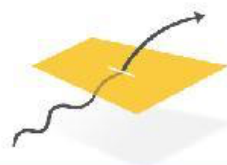


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- **Systems:** The group of interacting, interrelated, and/or interdependent elements within the organization that produce the desired results
  - **Structure, Policy, and Process:** Do the defined roles, authorities, procedures, and processes support efficient and effective operations?
  - **Continuous Improvement:** Does the organization maintain ongoing efforts to identify and achieve improvement in quality, cost, and service.
  - **Participation:** Are employees involved in setting direction, identifying and solving problems, and making improvements?
  -
  
- **People:** The condition of teamwork and relationship throughout the organization both between and within levels of organizational structure
  - **Quality of Supervision:** To what extent are people managers adding value to the organization by improving employee performance?
  - **Engagement:** How committed are employees to the purpose, vision, values, and goals of the company? Relates directly to employees' commitment to remain with your company
  - **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

## Overall Category Scores by Respondent Role

Role	Leadership Category	Systems Category	People Category
Owners (n=3)	69.70%	35.90%	47.00%
Managers (n=5)	28.50%	8.50%	64.00%
Staff (n=19)	59.20%	37.40%	44.70%
All (n=27)	54.68%	31.88%	48.53



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## Subcategories by Respondent Role

Role	Leadership Category			Systems Category			People Category			All Cat. Average
	Executive Function	Organizational Environment	Strategy	Structure, Process & Policy	Continuous Improvement	Participation	Supervision	Engagement	Teamwork & Coop	
Owners	44.70%	64.40%	100.00%	0.00%	62.78%	44.90%	40.70%	44.70%	55.60%	50.86%
Managers	31.73%	41.40%	12.37%	3.40%	17.30%	4.80%	68.90%	56.30%	66.80%	33.67%
Staff	44.20%	73.00%	60.40%	35.30%	36.90%	40.00%	45.20%	35.30%	53.59%	47.10%
ALL	41.95%	66.19%	55.91%	25.47%	36.15%	34.03%	49.09%	40.23%	56.26%	45.03%

### Strengths

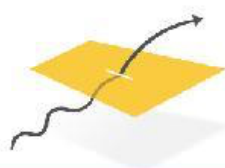
- Ownership is strongly aligned in Strategy.
- Teamwork and Cooperation is viewed as a strength by the majority of employees and owners.
- Staff feel very strongly positive about the Organizational Environment.

### Concerns

- Managers scored only 12% of possible points on Strategy, while owners scored 100%, i.e., Strategy is not communicated well, understood and/or supported by mid-level staff.
- Similarly, owners feel Continuous Improvement efforts are a strength, while managers and staff see it negatively impacting the organization.

### Observations

- Interestingly, managers scored engagement higher than owners and much higher than staff, indicating a commitment to the organization despite other low scores.
- All of the groups scored structures, process and policy quite low, indicating an ideal category to begin organizational improvements.



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