

Organizational Diagnostic Survey Flash Report

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Example Report

Prepared for:
Company Name
Contact Name
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Section 1: Survey Context and Background

In today's ever-evolving organizational landscape, adaptation and growth are not just ideals, but absolute necessities. Over nearly three decades, we've observed the constant dance of change—shaped by digital transformation, agile methodologies, and global interconnectivity. This journey, encapsulated in a comprehensive online survey spanning generations and innovation waves, scrutinizes 28 common and persistent challenges. These challenges fall into three overarching categories—People, Process, and Planning—impacting Organizational, Departmental, and Employee levels.

Our survey serves a dual purpose: illuminating current hurdles while guiding future initiatives. Like a game of "Organizational Whack-a-Mole," it shines a light on the lurking challenges within your organization's landscape that constantly and repeatedly pop up as factors change, namely in the movement of People, the evolution of Processes, and new project Planning.

Navigating and overcoming these hurdles and challenges demands more than just a highlight on the need for problem-solving skills—it necessitates mindset shifts, updated toolsets, and skills enhancement. It's a journey towards resilience and adaptability, guided by the survey results.

These repeated evolutionary situations in People, Process, and Planning are truly just that – situations – when they reveal themselves. However, left unattended they can turn into problems with more impactful consequences. The ideal company culture would be to be more proactive at situation handling and less reactive at problem solving. Embracing the notion that these situations can't and won't go away forever implies giving the support and tools needed at all levels of the company to be more proactive situation handlers by applying ICE – Intentionality, Consistency, and Engaging employees.

In the pages ahead, we'll delve into these challenges and opportunities. This report isn't just information; it's a practical roadmap to address your organizational landscape's nuances. With conclusions and recommendations from Innovative Management Tools, we invite you to embark on this journey into an organizational evolution by intentionally and proactively addressing the current organizational challenges as identified by your staff.

Section 2: Survey Respondent Details

This report presents data collected from the following demographics of respondents:

Company/Organization Name	Lighthouse Financial Services
Number of total participants	10
Number of individual locations surveyed	1
Location(s) Surveyed	Anywhere, USA or the world
Summary description of the roles and hierarchical levels represented by the survey participants	Employees Supervisors Managers Directors Unknown
Survey data collection date range	January 1-15, 2024
% of respondents who gave name	90%
% of respondents who did not give name	10%
% of surveyed respondents vs the targeted or desired quantity of respondents	100%
Average tenure in the company for the respondents	5.5 years

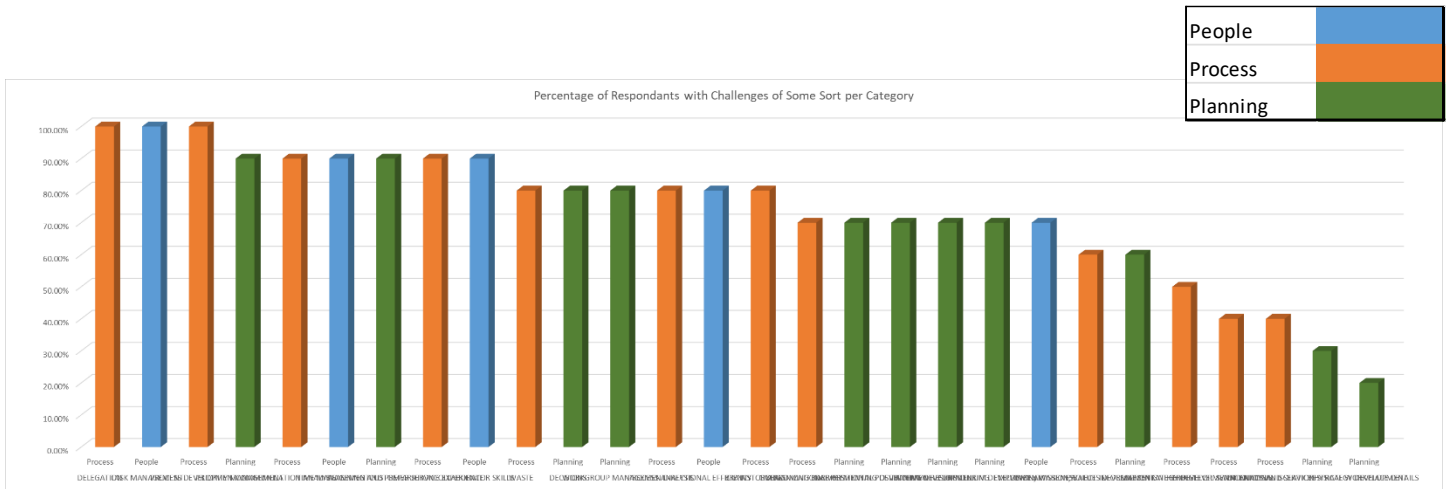
Section 3: Category Scores

We start this section with Category Popularity, by the number of scenarios selected across the respondent pool. We present this data in two ways: Table and Bar Chart.

Category	Total Clicks of Choices
DELEGATION	23
TASK MANAGEMENT	18
COLLABORATOR SKILLS	17
PRIORITY MANAGEMENT	17
COMMUNICATION ANALYSIS	16
DECISIONS	15
PROCESS DEVELOPMENT	15
CUSTOMER SERVICE EXPERIENCE	15
TIME MANAGEMENT	14
OVERCOMING BARRIERS	13
EMPLOYEE AWARENESS	13
PLANNING AND PREPARATION	12
WASTE	12
PROCESS ANALYSIS	11
ORGANIZATIONAL POSITIONING DEVELOPMENT	10
DEPARTMENTAL POSITIONING DEVELOPMENT	10
CURRICULUM DEVELOPMENT	10
WORKGROUP MANAGEMENT	10
BRAINSTORMING	9
PROJECT INFORMATION GATHERING	9
DIRECTIONAL EFFICIENCY	8
SALES STRATEGY DEVELOPMENT	8
INTERNAL RESTRUCTURING	8
VISION, MISSION, VALUES DEVELOPMENT	5
PRODUCTS AND SERVICES	5
PHYSICAL WORKPLACE DETAILS	4
HIGH-LEVEL SWOT ANALYSIS	3
INTENTIONAL ISOLATION STRATEGY DEVELOPMENT	1

Category Popularity vs Type of Situation: People, Process, or Planning

Here we show the categories from highest score to lowest score, based on if a scenario was selected by the respondents. The lower the score (and smaller the bar) indicates that there were more respondents who selected “No challenges with X” in the survey. The table version of data previously presented is shown in this bar chart.



Section 4: Top 5 Analysis

Every respondent has a perception of what is most important, critical, pressing, concerning, or challenging for them. The following table shows how often, out of the total pool of respondents, a category was tagged in the last question of the survey as one of the “Top 5” to address now.

Subject	Type	Count
Delegation	Process	5
Communication Analysis	Process	4
Priority Management	Planning	4
Task Management	People	4
Collaborator Skills	People	3
Departmental Positioning Development	Planning	3
Employee Awareness	People	3
Overcoming Barriers	Process	3
Time Management	People	3
Curriculum Development	Planning	2
Directional Efficiency	People	2
Planning and Preparation	Planning	2
Process Analysis	Process	2
Process Development	Process	2
Sales Strategy Development	Process	2
Brainstorming	Process	1
Customer Service Experience	Process	1
Internal Restructuring	Planning	1
Organizational Positioning Development	Planning	1
Project Information Gathering	Planning	1
Waste	Process	1
Decision	Planning	0
High-Level SWOT Analysis	Process	0
Intentional Isolation Strategy	Planning	0
Physical Workplace Details	Planning	0
Products and Services	Process	0
Vision, Mission, Values Development	Process	0
Workgroup Management	Planning	0

Section 5: Scenario Popularity

Here we present the top 25 most selected scenarios from the survey respondents.

Scenario Text	Count	Category
A person is getting his/her debut as a Project Leader and needs a structured approach on how to delegate tasks to project members.	9	DELEGATION
No challenges with Physical Workplace Details	8	PHYSICAL WORKPLACE DETAILS
Employees complain that information needed to do work arrives late, or not at all, impacting their performance and productivity.	8	COMMUNICATION ANALYSIS
Processes were established pre-current technology and tools being used and no process analysis has been done to identify where waste can be eliminated.	7	WASTE
Projects are jumped into without much more planning than deciding who will be on the project team and setting a deadline. The expectations are that things will be figured out over time. Recent project failures indicate that a new approach is	7	PLANNING AND PREPARATION
The company has processes that were never formalized because they were considered "insignificant" but have now grown in importance and need to be documented or formalized.	7	PROCESS DEVELOPMENT
There is an inconsistent customer journey experience during the customer journey that management wants to make more consistent.	7	CUSTOMER SERVICE EXPERIENCE
No challenges with Intentional Isolation Strategy	7	INTENTIONAL ISOLATION STRATEGY DEVELOPMENT
An employee has been promoted to the department supervisor role and is not willing to let go of the work from the old position.	7	DELEGATION
The supervisor or manager role has been expanded and the leader now needs to do "double" the work but doesn't have "double" the time.	7	DELEGATION
The same employees are on multiple projects at the same time and need help in prioritizing how to spread their time and talent.	7	PRIORITY MANAGEMENT
A department that has priorities and workload changing every so many months finds it challenging to follow the company's strategic changes and initiatives.	7	TASK MANAGEMENT
Some employees don't seem to be the best fit for a position but aren't horrible either. Need to understand their skill set to find a better fit.	6	COLLABORATOR SKILLS
Company products, services, and initiatives seem to be taking the company in various directions at the same time and management wants to reconcile everything into one place so that a company strategy and communication plan can be developed.	6	ORGANIZATIONAL POSITIONING DEVELOPMENT
There is a new supervisor or manager in a department and would like to get to know the staff beyond the job title and superficial interactions thus far.	6	EMPLOYEE AWARENESS
Certain departments have been caught without the needed skills present among the staff, causing issues, backlogs, or customer issues.	6	COLLABORATOR SKILLS
A department will be adding or losing staff and is wondering how to distribute the workload with the new staff.	6	TASK MANAGEMENT
There are complaints from employees that they can't get the work done because there are roadblocks, speedbumps, or obstacles in their way.	6	OVERCOMING BARRIERS
The company has noticed that some employees work extra hours, don't take lunch, or take work home, suggesting that the employees might need time management skills coaching.	6	TIME MANAGEMENT
Certain leadership members' decisions have created chaos in the past because of poorly anticipating the impact on the people and processes.	6	DECISIONS
No challenges with Products and Services	6	PRODUCTS AND SERVICES
No challenges with High-Level SWOT Analysis	6	HIGH-LEVEL SWOT ANALYSIS
Project teams that launched into action in the past without an adequate plan on how to prioritize resources have created problems and now the company wants to plan a project in a different way to avoid creating problems.	5	PRIORITY MANAGEMENT
Decisions are made without fully considering the impact it will have on the people doing the work.	5	DECISIONS
Employees are commenting that they have too much work and not enough hours even though the same position and workload has been or is being performed without issues by others.	5	TIME MANAGEMENT

Section 6: Report Conclusions / Interpretations

During this survey, encompassing the challenges faced by Lighthouse Financial Services, several critical observations and conclusions have surfaced. These findings provide valuable insights into the organization's dynamics, highlighting areas that warrant immediate attention and areas of unexpected significance. Below, we present a summary of the most salient conclusions:

Section 2: Survey Respondent Details

- With an average tenure of 5.5 years for the respondent group, it is probable that these employees have a strong knowledge of the company and have a high level of exposure in the workings of the company at multiple levels.

Section 3: Category Scores

- Delegation stands out above the other categories by 28%, suggesting that supervisors, managers, and leaders do not delegate tasks effectively, perhaps giving the impression to others that they are simply moving unwanted tasks off their plate or “dumping” tasks.
- Task Management, aka Workload Distribution, is the most basic activity to address in a department because it directly impacts productivity, morale, and reaching goals.

Section 4: Top 5 Analysis

- The top challenges identified by respondents are evenly spread across the three areas of People, Process, and Planning, suggesting that while all areas are being addressed to some degree, there is room for improvement.
- Delegation once again emerged as the top concern, signaling the need for enhanced delegation skills and coaching at the supervisor, manager, team leader, and leadership levels.
- Seven of the top 10 scores touch department level activities, signaling a need to provide department leaders and their employees with more tools to work through their daily challenges and improve outputs, outcomes, and productivity.

Section 5: Scenario Popularity

- The three Delegation scenarios rank in the highest three scores (9, 8, and 7) of the 10 respondents. This clearly highlights the need for action.
- Again, looking at the highest scores (9, 8, and 7 of the 10 respondents), several scenario categories were not selected for the Top 5 most critical. This is curious and might suggest that while the challenges are prevalent and widespread, the respondents don't see that there is a way to overcome the challenges or that they accept that “it is just how we do things around here, even though I see a need to fix it”. These scenarios fall into the categories of Waste, Planning and Preparation, Process Development, and Customer Service Experience.
- Seven out of 10 respondents feel that priorities or workloads are changing every so many months, making it hard to follow the company's strategic changes and initiatives. This is a call to the senior management to look at their focus as a company and their communication methods to the departments and staff. Alignment across all levels is imperative for success. Senior Management misalignment creates confusion across the company.

Section 7: Recommendations

Based on this preliminary survey of 10 respondents, here are some recommendations that can be made:

- Consider surveying a larger group of employees to see if the findings from this group of 10 respondents remains constant with the larger audience.
- If this group came from a single department, area, or division, look at the root causes for the existence of these challenges. This is not to blame on any one supervisor, manager, or leader. These challenges continually repeat themselves as People move in and out of a department, Processes need to evolve to stay aligned with the business plans and goals, and new project need adequate Planning for success. This is called “business”. We can never eliminate the challenges for good. All we can do is to provide the people dealing with the challenges with the support, coaching, and tools needed to handle the situations as quickly, efficiently, and effectively as possible once the situation presents itself.
- Focus on how Delegation is handled in the company, at all levels. If Senior Management is doing a poor job of delegating tasks, then it should be no surprise that others follow the role model from their immediate supervisor. First-time supervisors or leaders require coaching and a process for effective delegation. If you have a tool available to teach and coach people on Effective Delegation, it is highly recommended to start using it. If your company has nothing, we recommend that you consider the Conversation Framework HANND-OFF by Innovative Management Tools. Follow this link to learn more: [HAND-OFF - a Conversation Framework overview - Innovative Management Tools](#)
- Communication and lack of information needed to do one’s job is another high-scoring scenario. To dig into this topic with the 8 out of 10 respondents, we recommend the Conversation Framework BRIDGES to structure the conversation with them to reach tangible solutions and outcomes. See this link for more information on BRIDGES (if you don’t have another tool that addresses communication challenges): [BRIDGES - a Conversation Framework overview - Innovative Management Tools](#)
- For the second highest category, Task Management, we recommend our Conversation Framework HATS. This framework is a highly effective collaboration tool that digs into the topic that is most important to employees – how they spend their time and what is inhibiting their productivity, morale, and work engagement. This one Conversation Framework serves as a springboard to uncovering the many reasons and challenges as to why all the work can’t get done in a day. For more information on HATS, follow this link: [HATS - Task Management Activity - Innovative Management Tools](#)
- Finally, because it was identified that projects are jumped into without (what the respondents fl is) adequate preparation, we invite you to consider adopting the Conversation Framework NAVIGATE (follow this link for information: [NAVIGATE - a Conversation Framework overview - Innovative Management Tools](#)). With just a few hours of pre-launch planning and preparation, a project or initiative can get off to a more successful path to completion and avoid the comm (and frustrating) moment of “regrouping” because certain core topics were not discussed and thought through or identified at the onset of launching the project. Pay Now, or Pay Later – the old adage holds true here. If you decide to “Pay Later”, it is almost certain that the undo, redo, go back, rework, and get back on track will cost more time, money, energy, and emotional frustration for the people doing the project work.

Section 8: Who is Innovative Management Tools?

Established in 2003, **Innovative Management Tools (IMT)** has evolved over two decades, originally focused on creating personal survival tools for project problem-solving. It later expanded its mission to assist organizations in overcoming challenges and embracing change, broadening its scope to include middle management, whole organizations, and individual employees.

In 2012, IMT ventured into problem-solving sales, aligning with their core problem-solving ethos. This exploration led to the integration of brain science, sales strategies, and change management into a comprehensive approach.

The global pandemic in 2020 prompted IMT to delve into neuroscience and start writing a book that focuses on Problem-Solving Selling that combines processes, brain science, coaching, storytelling, trust-building, and the buying process. The book, ***“A Crocodile Brain Can Make or Break Your Sale, The Science and Process to Guiding Organizations to Buy from You”*** is to be published in late 2023.

By late 2022, IMT digitized its suite of almost 30 change management tools, placing it at the intersection of digital change management tools, problem-solving sales, and neuroscience insights as it celebrated its 20th anniversary. This transformation and entry into the digital-delivery space reflects IMT's dedication to helping organizations navigate change and overcome organizational situations and challenges innovatively.

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