

Organizational Diagnostic Survey Full Report

Prepared by:
Innovative Management Tools LLC
Patrick Seaton



Prepared for:
Company Name
Contact Name
Month/Year

Powered by:



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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.

Navigating these hurdles demands more than problem-solving—it necessitates mindset shifts, updated toolsets, and skill enhancement. It's a journey towards resilience and adaptability, guided by the survey results.

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 and Stable Ascent, we invite you to embark on this journey into 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	91
Number of individual locations surveyed	1
Location(s) Surveyed	Green Bay, WI
Summary description of the roles and hierarchical levels represented by the survey participants	Employees Supervisors Managers Directors Unknown
Survey data collection date range	September 1-15, 2023
% of respondents who gave name	68%
% of respondents who did not give name	32%
% of surveyed respondents vs the targeted or desired quantity of respondents	91%

Observations:

In this section, starting from the top of the table, there are a few observations worth noting.

- 1) The mix of participants and respondents to the survey covers all ranges of the company from employees, supervisors, managers, and directors. There are some unnamed respondents, which brings up the second point.
- 2) The number of respondents who did not give a name, at 32%, is something that could be looked at and studied as to why almost a third of the respondents did not feel willing to give their name. Is that a trend or something within a department that they are not willing to share?
- 3) The number of surveyed respondents versus the targeted or desired quantity of respondents at 91% is rather good. This implies that employees do want to participate and have their input considered, but the percentage of those who do not share their name (point #1) is something of potential interest to dig into to see if there are trends by department or area.

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 three forms: Table, Pie Chart, and Bar Chart.

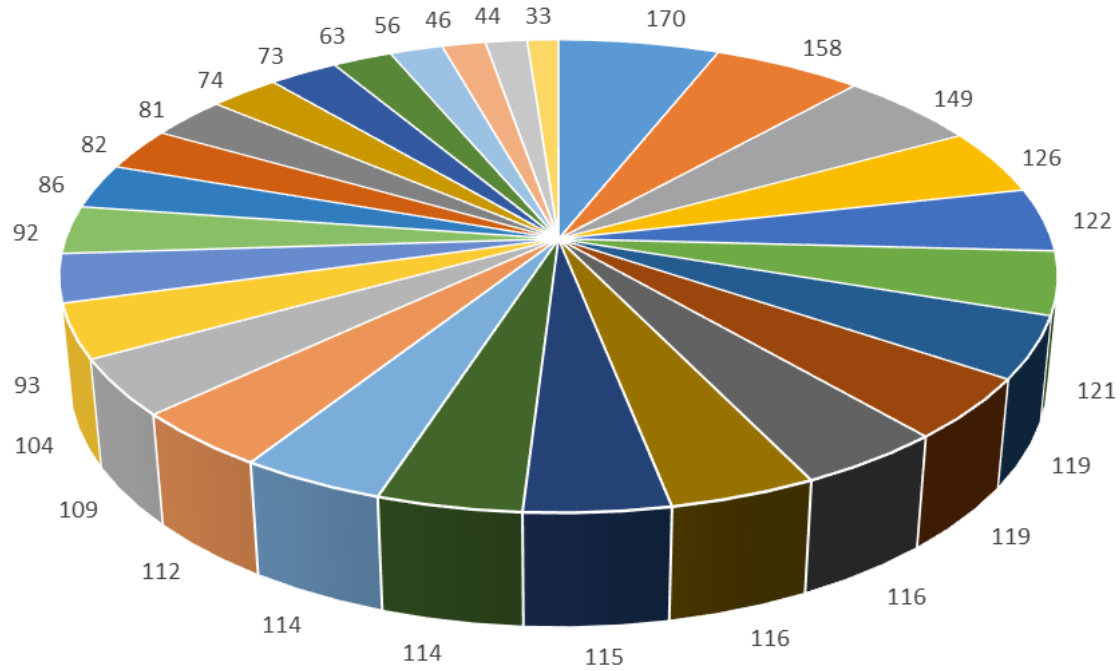
Category	Total Clicks of Choices
DELEGATION	170
COLLABORATOR SKILLS	158
PRIORITY MANAGEMENT	149
EMPLOYEE AWARENESS	126
TASK MANAGEMENT	122
TIME MANAGEMENT	121
COMMUNICATION ANALYSIS	119
PLANNING AND PREPARATION	119
PROCESS DEVELOPMENT	116
OVERCOMING BARRIERS	116
PROCESS ANALYSIS	115
DIRECTIONAL EFFICIENCY	114
ORGANIZATIONAL POSITIONING DEVELOPMENT	114
CUSTOMER SERVICE EXPERIENCE	112
WASTE	109
DECISIONS	104
BRAINSTORMING	93
DEPARTMENTAL POSITIONING DEVELOPMENT	92
WORKGROUP MANAGEMENT	86
INTERNAL RESTRUCTURING	82
VISION, MISSION, VALUES DEVELOPMENT	81
SALES STRATEGY DEVELOPMENT	74
CURRICULUM DEVELOPMENT	73
PRODUCTS AND SERVICES	63
PROJECT INFORMATION GATHERING	56
HIGH-LEVEL SWOT ANALYSIS	46
PHYSICAL WORKPLACE DETAILS	44
INTENTIONAL ISOLATION STRATEGY DEVELOPMENT	33

Observations:

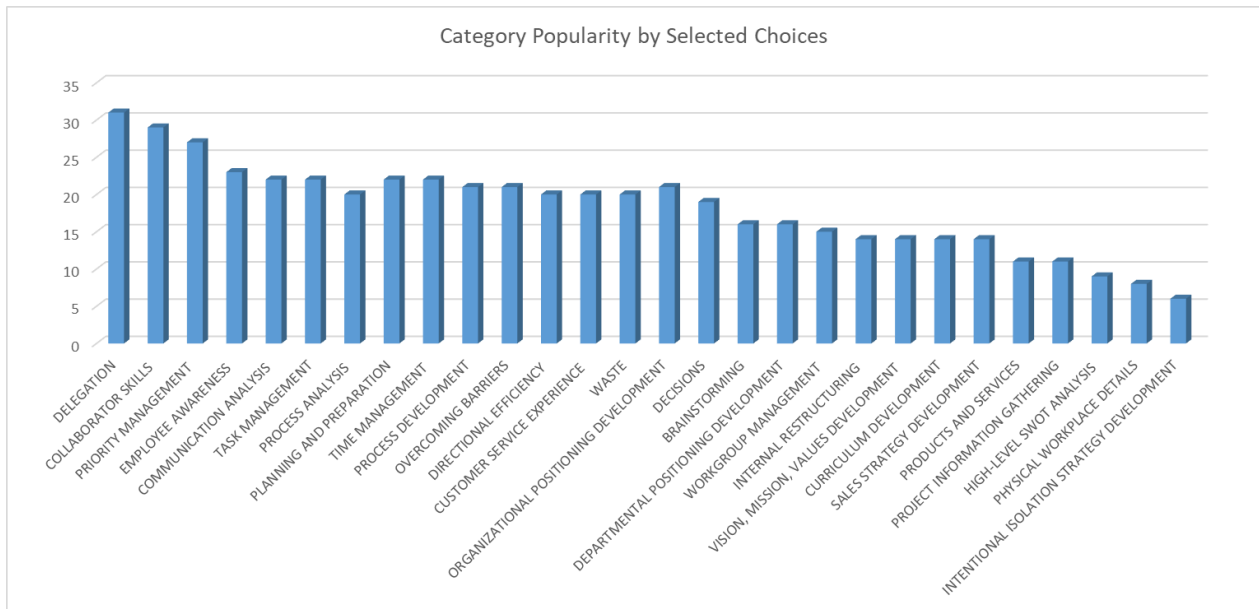
In this table there is one observation worth noting.

The median score for all of the clicks in the survey responses from the respondents is 100. Therefore, having 70%, 58%, and 50% more for Delegation, Collaborator Skills, and Priority Management is a sign that there is certainly something there to be investigated.

Category Popularity by Selected Choices

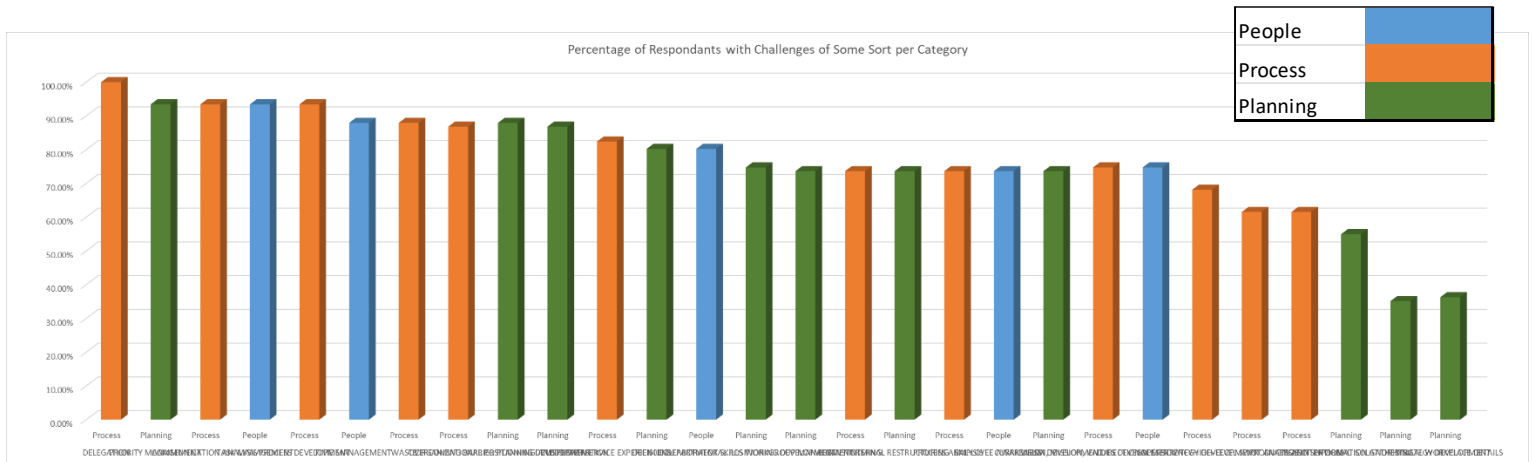


- DELEGATION
- COLLABORATOR SKILLS
- PRIORITY MANAGEMENT
- EMPLOYEE AWARENESS
- TASK MANAGEMENT
- TIME MANAGEMENT
- COMMUNICATION ANALYSIS
- PLANNING AND PREPARATION
- PROCESS DEVELOPMENT
- OVERCOMING BARRIERS
- PROCESS ANALYSIS
- DIRECTIONAL EFFICIENCY
- ORGANIZATIONAL POSITIONING DEVELOPMENT
- CUSTOMER SERVICE EXPERIENCE
- WASTE
- DECISIONS
- BRAINSTORMING
- DEPARTMENTAL POSITIONING DEVELOPMENT
- WORKGROUP MANAGEMENT
- INTERNAL RESTRUCTURING
- VISION, MISSION, VALUES DEVELOPMENT
- SALES STRATEGY DEVELOPMENT
- CURRICULUM DEVELOPMENT
- PRODUCTS AND SERVICES



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 presented in this bar chart follows the graph.



Graph Observations:

In this table there is one observation worth highlighting at this moment.

- 1) Of the top 10 categories, 50% are Process related, 30% are Planning related, and 20% are People related.

Percentage of Respondants with Challenges of Some Sort per Category

Category	Focus	Score
DELEGATION	Process	100.00%
PRIORITY MANAGEMENT	Planning	93.41%
COMMUNICATION ANALYSIS	Process	93.41%
TASK MANAGEMENT	People	93.41%
PROCESS DEVELOPMENT	Process	93.41%
TIME MANAGEMENT	People	87.91%
WASTE	Process	87.91%
OVERCOMING BARRIERS	Process	86.81%
ORGANIZATIONAL POSITIONING DEVELOPMENT	Planning	87.91%
PLANNING AND PREPARATION	Planning	86.81%
CUSTOMER SERVICE EXPERIENCE	Process	82.42%
DECISIONS	Planning	80.22%
COLLABORATOR SKILLS	People	80.22%
DEPARTMENTAL POSITIONING DEVELOPMENT	Planning	74.73%
WORKGROUP MANAGEMENT	Planning	73.63%
BRAINSTORMING	Process	73.63%
INTERNAL RESTRUCTURING	Planning	73.63%
PROCESS ANALYSIS	Process	73.63%
EMPLOYEE AWARENESS	People	73.63%
CURRICULUM DEVELOPMENT	Planning	73.63%
VISION, MISSION, VALUES DEVELOPMENT	Process	74.73%
DIRECTIONAL EFFICIENCY	People	74.73%
SALES STRATEGY DEVELOPMENT	Process	68.13%
HIGH-LEVEL SWOT ANALYSIS	Process	61.54%
PRODUCTS AND SERVICES	Process	61.54%
PROJECT INFORMATION GATHERING	Planning	54.95%
INTENTIONAL ISOLATION STRATEGY DEVELOPMENT	Planning	35.16%
PHYSICAL WORKPLACE DETAILS	Planning	36.26%

Table Observations:

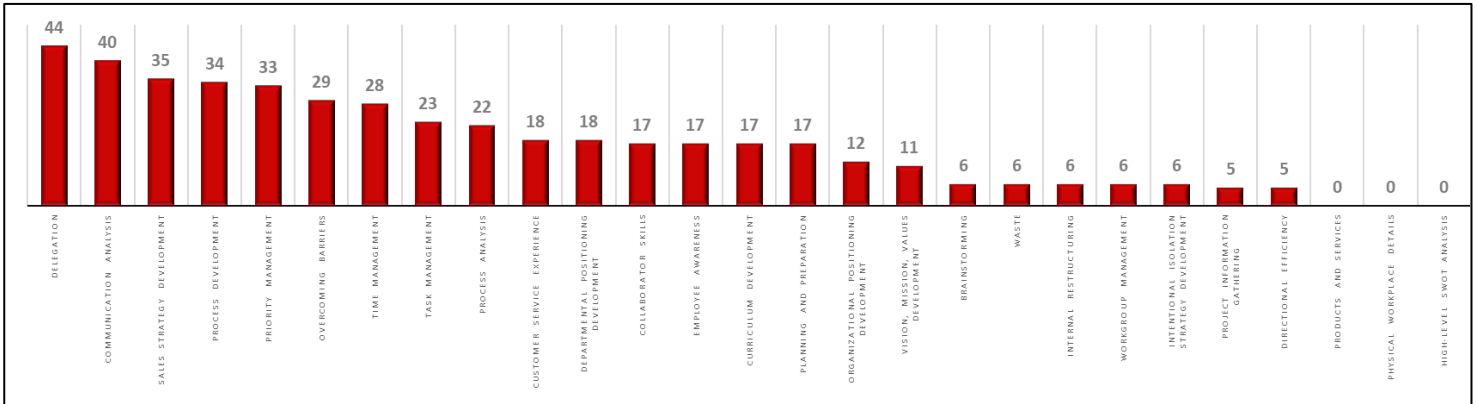
From this table we can highlight one thing.

- 1) Of the 28 Categories of challenges, 22 fall within roughly 75% and above of respondents saying that there are current challenges.

Section 4: Top 5 Analysis

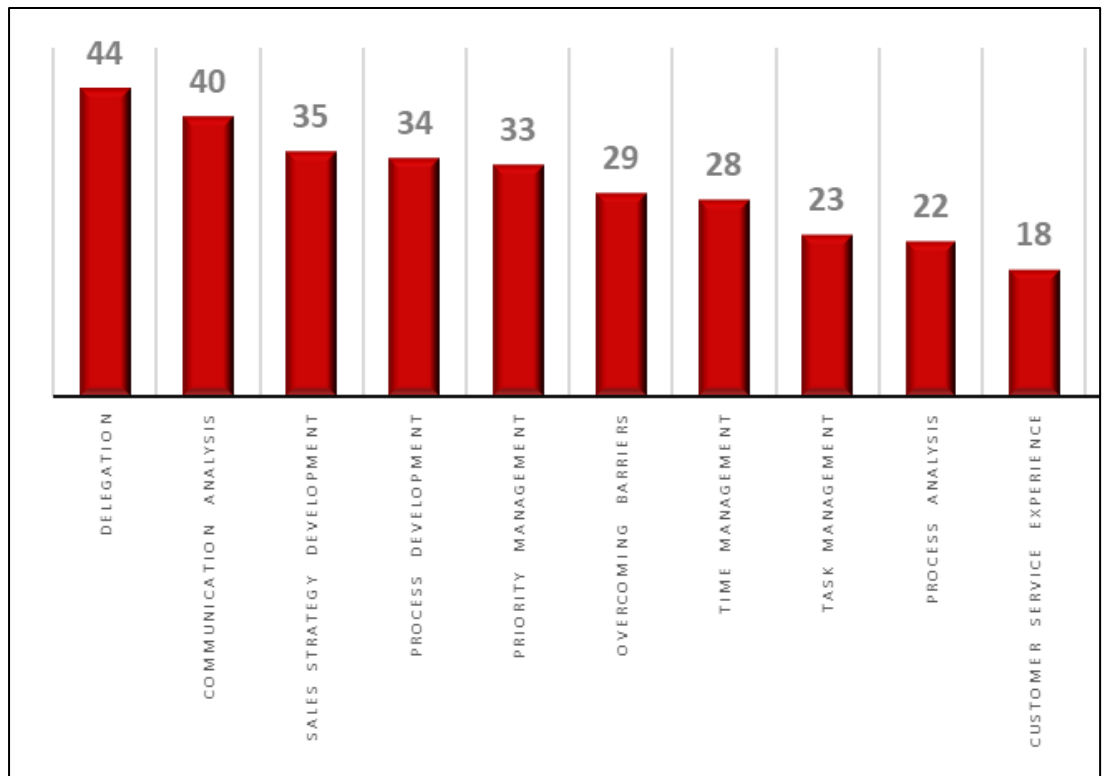
Every respondent has a perception of what is most important, critical, pressing, concerning, or challenging for them. The following table shows how often, out of the total pool of respondents, a category was tagged in the last question of the survey one of the “Top 5”.

Subject	Type	Count
Delegation	Process	44
Communication Analysis	Process	40
Sales Strategy Development	Process	35
Process Development	Process	34
Priority Management	Planning	33
Overcoming Barriers	Process	29
Time Management	People	28
Task Management	People	23
Process Analysis	Process	22
Customer Service Experience	Process	18
Departmental Positioning Development	Planning	18
Collaborator Skills	People	17
Employee Awareness	People	17
Curriculum Development	Planning	17
Planning and Preparation	Planning	17
Organizational Positioning Development	Planning	12
Vision, Mission, Values Development	Process	11
Brainstorming	Process	6
Waste	Process	6
Internal Restructuring	Planning	6
Decisions	Planning	0
Workgroup Management	Planning	6
Intentional Isolation Strategy Development	Planning	6
Project Information Gathering	Planning	5
Directional Efficiency	People	5
Products and Services	Process	0
Physical Workplace Details	Planning	0
High-Level SWOT Analysis	Process	0
Total		455



Subject	Type	Count
Delegation	Process	44
Communication Analysis	Process	40
Sales Strategy Development	Process	35
Process Development	Process	34
Priority Management	Planning	33
Overcoming Barriers	Process	29
Time Management	People	28
Task Management	People	23
Process Analysis	Process	22
Customer Service Experience	Process	18

The 10 Categories most selected as one of the Top 5 at the end of the survey.



Observations

From the above tables, a few observations can be made:

1. As previously mentioned, 70% of the Top 5 highest scores fall into the Process area.
2. Delegation, the #1 selection for Top 5, earned more than 10% of the votes for being in the Top 5.
3. Sales Strategy Development ranks #3 in votes earning, but curiously it ranked low in the Category scoring. Lower in one way, but higher impact in another?
4. Waste is the opposite of Sale Strategy Development. It ranked very high in the Category scoring, but very few people placed it in the Top 5 scores. Could this mean that while the people see and feel a lot of waste happening, they have become complacent with the waste being there and don't expect it to be taken care of? Or maybe they don't have an effective and efficient way to get rid of the waste.
5. The three Categories that never made it into a respondent's Top 5 are Products and Services, Physical Workplace Details, and High-Level SWOT Analysis. Does this coincide with senior management?
6. In the table showing the 10 most selected Top 5 Categories, it is interesting to note that only one Category is Employee-related, Time Management, while all the others are Departmental and Organizational topics.

Section 5: Category Score Details

In this extensive section of the report, we share the results of each category, one-by-one, with the number of respondents who selected each scenario. Below each table is a graphical representation of the data. The categories are presented in the order they appeared in the survey.

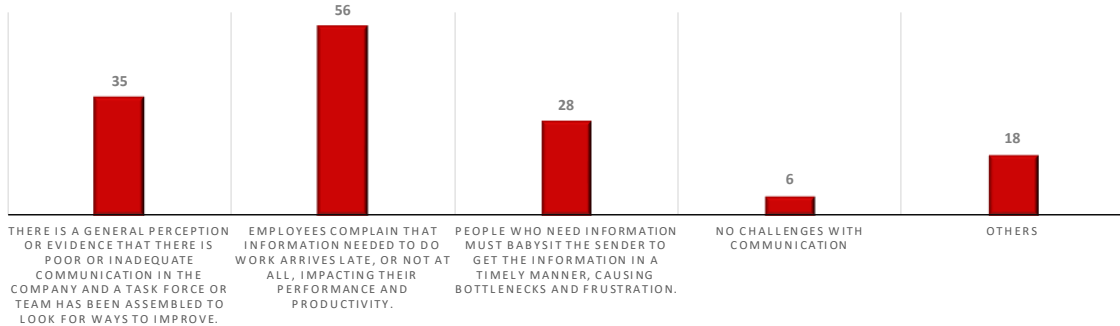
Stand-out Data Points or Anomalies in the upcoming tables:

- 1) Several categories received a high number of “Other” responses in the survey. What this tells us is that while the three scenarios for the Categories did not resonate with the respondents as challenges, they had other challenges that fell into the Category that was critical enough to write into the survey. A further deep dive into these Categories and the “Other” comments may be of use and interest to the company. The Categories that fall into this category are the following:
 - Brainstorming
 - Products and Services
 - Internal restructuring
 - Curriculum Development
 - Vision, Mission, and Values Development
 - High-Level SWOT Analysis
- 2) Project Information Gathering:
 - The response “No Challenges” beats all other scenarios.
 - With no challenges in this Category, does this mean that the company’s planning and project scoping is at an expert level?
 - The interesting contradiction to this Category receiving so many selections for “No Challenges” is that the Category Planning and Preparation received 119 scenario selections in the listed challenges. There seems to be a disconnect in the data that might merit further investigation.
- 3) Departmental Positioning:
 - With such a low score, do the respondents know what this document is? It is often considered a non-issue for employees who have never seen or used such a document to understand its power.
- 4) High-Level SWOT Analysis:
 - This is another Category that might have received low scores because of lack of knowledge or past use of a SWOT Analysis. Does the company use SWOT as an internal tool? If not, it might be a contributing factor in its low score.
- 5) Workgroup Management:
 - This Category stands out because it has many challenges selected by the respondents and at the same time it received an almost equal number of “No Challenges” responses. This brings the question as to whether there is a large difference between Team Leader skills in the organization. Some are quite talented at starting teams while others are not. This might be something to dig into at a deeper level.

1

COMMUNICATION ANALYSIS

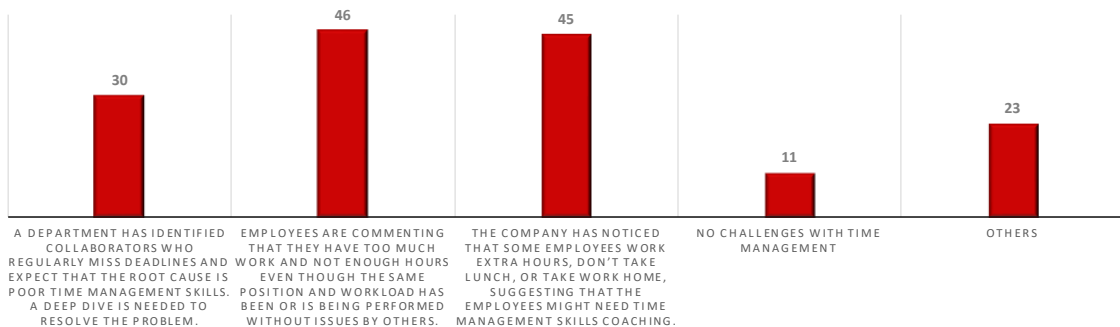
Subject	Count	%		
There is a general perception or evidence that there is poor or inadequate communication in the company and a task force or team has been assembled to look for ways to improve.	35	29.41%		
Employees complain that information needed to do work arrives late, or not at all, impacting their performance and productivity.	56	47.06%		
People who need information must babysit the sender to get the information in a timely manner, causing bottlenecks and frustration.	28	23.53%		
No challenges with Communication	6	6.59%	93.41%	With Challenges
Others	18	15.13%		
Total Times Given Scenarios Checked	119	6.59%		



2

TIME MANAGEMENT

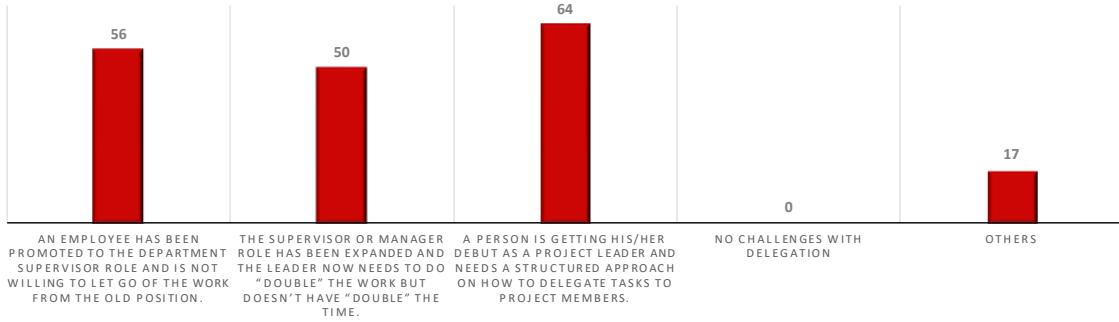
Subject	Count	%		
A department has identified collaborators who regularly miss deadlines and expect that the root cause is poor time management skills. A deep dive is needed to resolve the problem.	30	24.79%		
Employees are commenting that they have too much work and not enough hours even though the same position and workload has been or is being performed without issues by others.	46	38.02%		
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.	45	37.19%		
No challenges with Time Management	11	12.09%	87.91%	With Challenges
Others	23	19.01%		
Total Times Given Scenarios Checked	121	12.09%		



DELEGATION

Subject	Count	%
An employee has been promoted to the department supervisor role and is not willing to let go of the work from the old position.	56	32.94%
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.	50	29.41%
A person is getting his/her debut as a Project Leader and needs a structured approach on how to delegate tasks to project members.	64	37.65%
No challenges with Delegation	0	0.00%
Others	17	10.00%
Total Times Given Scenarios Checked	170	0.00%

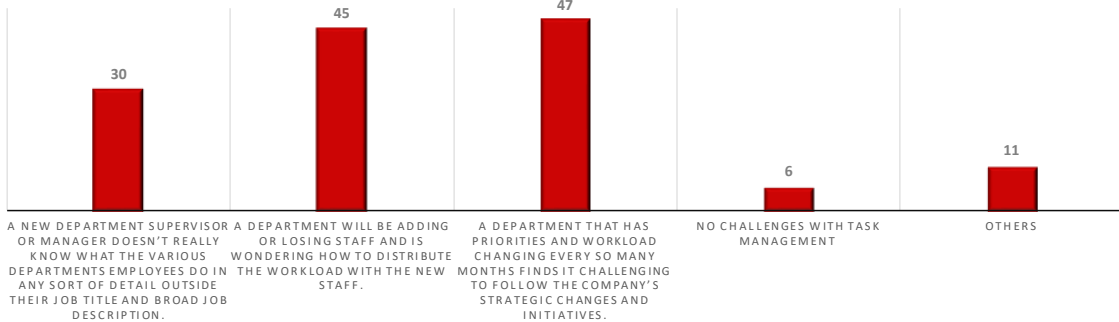
100.00% With Challenges



TASK MANAGEMENT

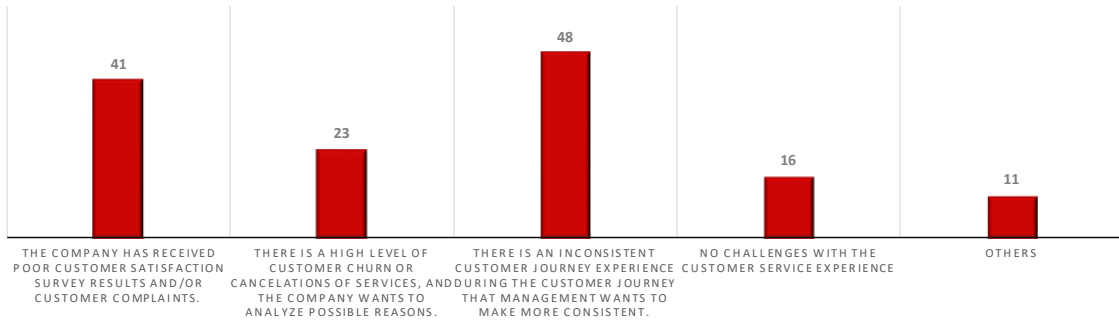
Subject	Count	%
A new department supervisor or manager doesn't really know what the various departments employees do in any sort of detail outside their job title and broad job description.	30	24.59%
A department will be adding or losing staff and is wondering how to distribute the workload with the new staff.	45	36.89%
A department that has priorities and workload changing every so many months finds it challenging to follow the company's strategic changes and initiatives.	47	38.52%
No challenges with Task Management	6	6.59%
Others	11	9.02%
Total Times Given Scenarios Checked	122	6.59%

93.41% With Challenges



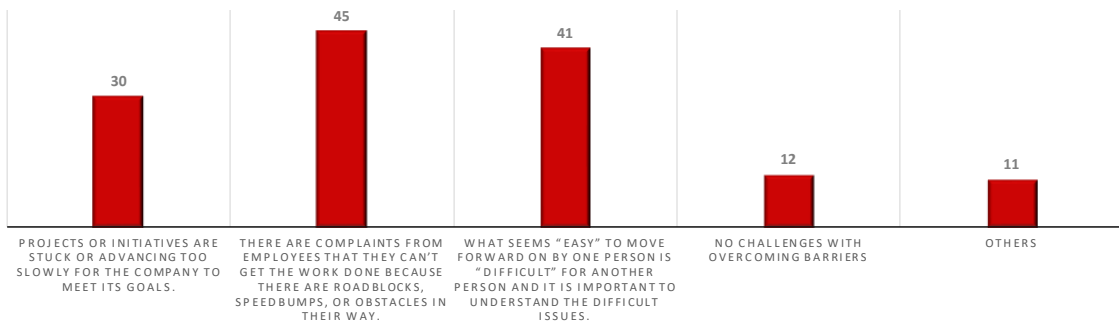
CUSTOMER SERVICE EXPERIENCE

Subject	Count	%	
The company has received poor customer satisfaction survey results and/or customer complaints.	41	36.61%	
There is a high level of customer churn or cancellations of services, and the company wants to analyze possible reasons.	23	20.54%	
There is an inconsistent customer journey experience during the customer journey that management wants to make more consistent.	48	42.86%	
No challenges with the Customer Service Experience	16	17.58%	82.42% With Challenges
Others	11	9.82%	
Total Times Given Scenarios Checked	112	17.58%	



OVERCOMING BARRIERS

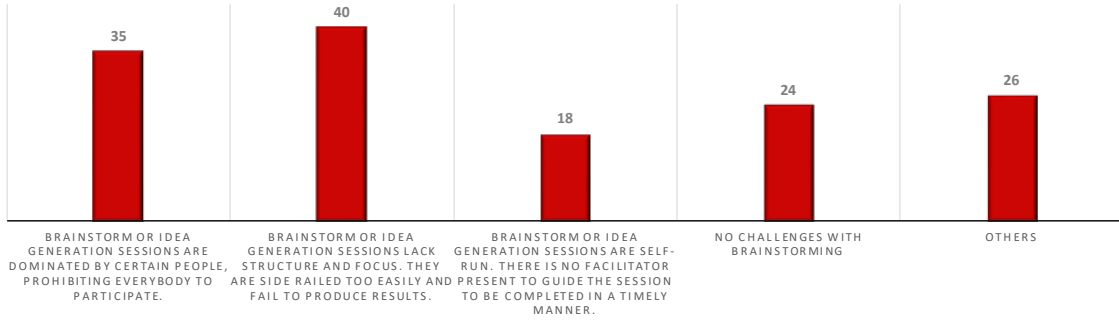
Subject	Count	%	
Projects or initiatives are stuck or advancing too slowly for the company to meet its goals.	30	25.86%	
There are complaints from employees that they can't get the work done because there are roadblocks, speedbumps, or obstacles in their way.	45	38.79%	
What seems "easy" to move forward on by one person is "difficult" for another person and it is important to understand the difficult issues.	41	35.34%	
No challenges with Overcoming Barriers	12	13.19%	86.81% With Challenges
Others	11	9.48%	
Total Times Given Scenarios Checked	116	13.19%	



BRAINSTORMING

Subject	Count	%
Brainstorm or idea generation sessions are dominated by certain people, prohibiting everybody to participate.	35	37.63%
Brainstorm or idea generation sessions lack structure and focus. They are side railed too easily and fail to produce results.	40	43.01%
Brainstorm or idea generation sessions are self-run. There is no facilitator present to guide the session to be completed in a timely manner.	18	19.35%
No challenges with Brainstorming	24	26.37%
Others	26	27.96%
Total Times Given Scenarios Checked	93	26.37%

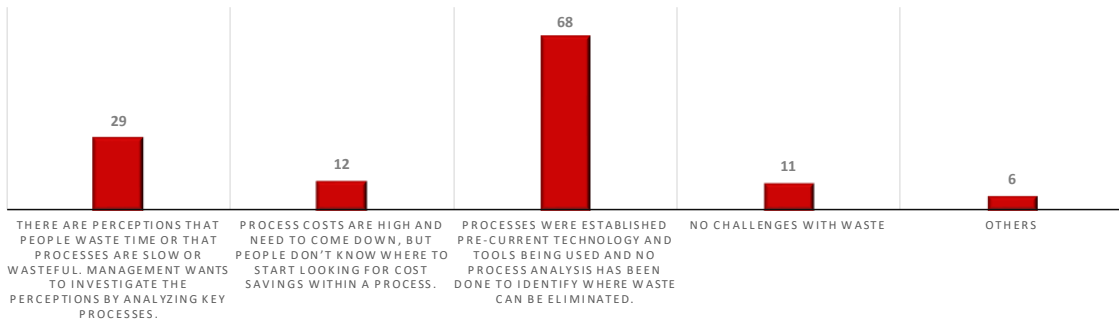
73.63% With Challenges



WASTE

Subject	Count	%
There are perceptions that people waste time or that processes are slow or wasteful. Management wants to investigate the perceptions by analyzing key processes.	29	26.61%
Process costs are high and need to come down, but people don't know where to start looking for cost savings within a process.	12	11.01%
Processes were established pre-current technology and tools being used and no process analysis has been done to identify where waste can be eliminated.	68	62.39%
No challenges with Waste	11	12.09%
Others	6	5.50%
Total Times Given Scenarios Checked	109	12.09%

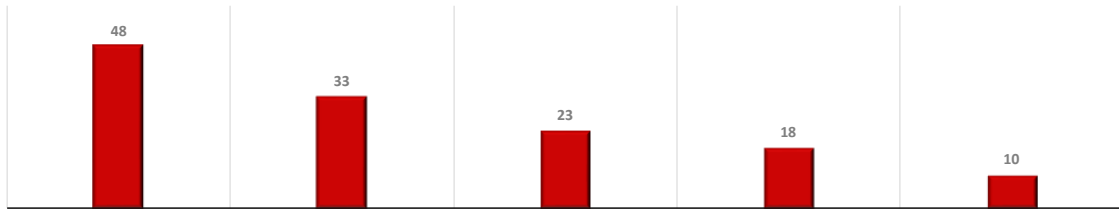
87.91% With Challenges



DECISIONS

Subject	Count	%
Decisions are made without fully considering the impact it will have on the people doing the work.	48	46.15%
Certain leadership members' decisions have created chaos in the past because of poorly anticipating the impact on the people and processes.	33	31.73%
There are complaints about decisions made in the past that have increased workload or created confusion within a process and now the company wants to avoid those same issues.	23	22.12%
No challenges with Decisions	18	19.78%
Others	10	9.62%
Total Times Given Scenarios Checked	104	19.78%

80.22% With Challenges

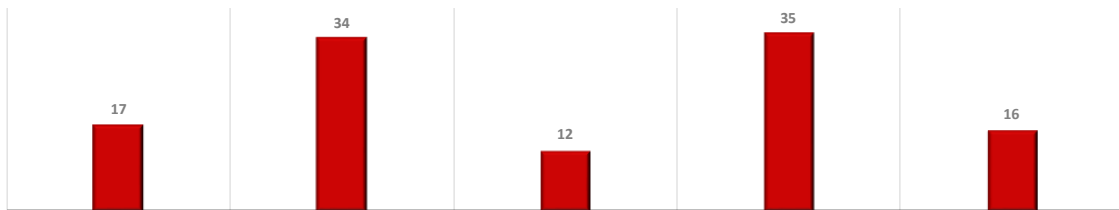


DECISIONS ARE MADE WITHOUT FULLY CONSIDERING THE IMPACT IT WILL HAVE ON THE PEOPLE DOING THE WORK. CERTAIN LEADERSHIP MEMBERS' DECISIONS HAVE CREATED CHAOS IN THE PAST BECAUSE OF POORLY ANTICIPATING THE IMPACT ON THE PEOPLE AND PROCESSES. THERE ARE COMPLAINTS ABOUT DECISIONS MADE IN THE PAST THAT HAVE INCREASED WORKLOAD OR CREATED CONFUSION WITHIN A PROCESS AND NOW THE COMPANY WANTS TO AVOID THOSE SAME ISSUES. NO CHALLENGES WITH DECISIONS OTHERS

PRODUCTS AND SERVICES

Subject	Count	%
Products or services need to be updated but there is no official "Product Manager" on staff to drive the updating/upgrading project. A structured framework is needed to guide the process.	17	26.98%
There are complaints about current products or services and a product revisit, review, upgrade, update, or analysis is needed.	34	53.97%
A product or service has more than three years in the market without having a facelift or update. The company wants to review if anything should be done about that.	12	19.05%
No challenges with Products and Services	35	38.46%
Others	16	25.40%
Total Times Given Scenarios Checked	63	38.46%

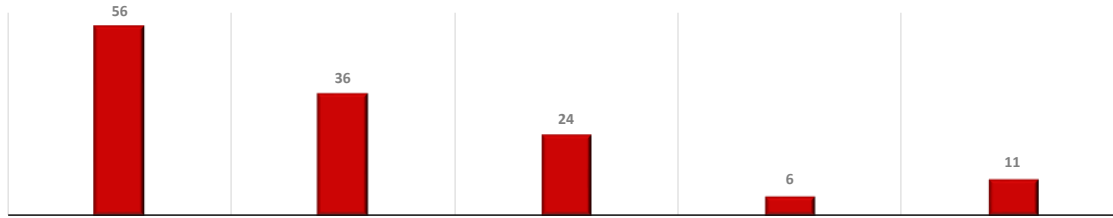
61.54% With Challenges



PRODUCTS OR SERVICES NEED TO BE UPDATED BUT THERE IS NO OFFICIAL "PRODUCT MANAGER" ON STAFF TO DRIVE THE UPDATING/UPGRADING PROJECT. A STRUCTURED FRAMEWORK IS NEEDED TO GUIDE THE PROCESS. THERE ARE COMPLAINTS ABOUT CURRENT PRODUCTS OR SERVICES AND A PRODUCT REVISIT, REVIEW, UPGRADE, UPDATE, OR ANALYSIS IS NEEDED. A PRODUCT OR SERVICE HAS MORE THAN THREE YEARS IN THE MARKET WITHOUT HAVING A FACELIFT OR UPDATE. THE COMPANY WANTS TO REVIEW IF ANYTHING SHOULD BE DONE ABOUT THAT. NO CHALLENGES WITH PRODUCTS AND SERVICES OTHERS

PROCESS DEVELOPMENT

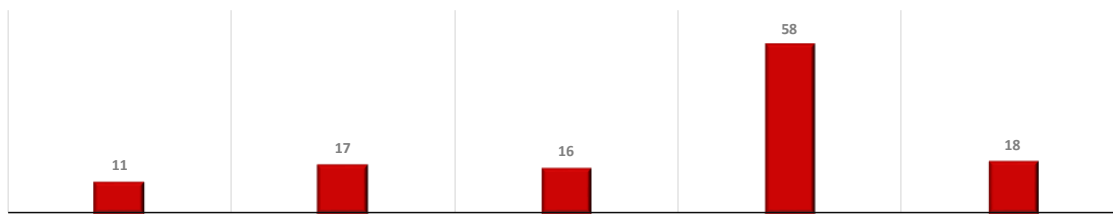
Subject	Count	%	
The company has processes that were never formalized because they were considered "insignificant" but have now grown in importance and need to be documented or formalized.	56	48.28%	
There are informal processes that need to be documented for ISO or audit purposes.	36	31.03%	
The company has a process that is so old, outdated, broken, or just beyond the tweaking point that the company just wants to start over and build a new process from scratch.	24	20.69%	
No challenges with Process Development	6	6.59%	93.41% With Challenges
Others	11	9.48%	
Total Times Given Scenarios Checked	116	6.59%	



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. THERE ARE INFORMAL PROCESSES THAT NEED TO BE DOCUMENTED FOR ISO OR AUDIT PURPOSES. THE COMPANY HAS A PROCESS THAT IS SO OLD, OUTDATED, BROKEN, OR JUST BEYOND THE TWEAKING POINT THAT THE COMPANY JUST WANTS TO START OVER AND BUILD A NEW PROCESS FROM SCRATCH. NO CHALLENGES WITH PROCESS DEVELOPMENT OTHERS

PHYSICAL WORKPLACE DETAILS

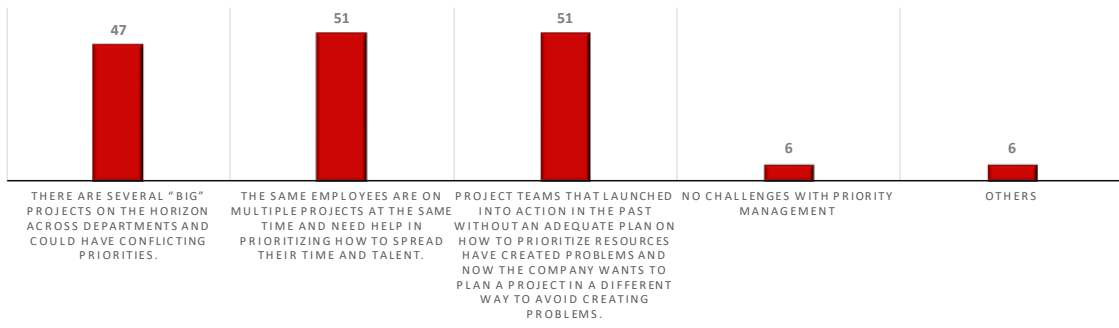
Subject	Count	%	
The company is in an older office setting, and it is obvious that some attention needs to be given to the physical attributes of the office.	11	25.00%	
Customers complain or ask questions about the stability of the company because of certain "details" that seem to go unattended.	17	38.64%	
The office upkeep/improvement budget was cut and it is beginning to show the consequences of that through "small" maintenance and upkeep details around the office.	16	36.36%	
No challenges with Physical Workplace Details	58	63.74%	36.26% With Challenges
Others	18	40.91%	
Total Times Given Scenarios Checked	44	63.74%	



THE COMPANY IS IN AN OLDER OFFICE SETTING, AND IT IS OBVIOUS THAT SOME ATTENTION NEEDS TO BE GIVEN TO THE PHYSICAL ATTRIBUTES OF THE OFFICE. CUSTOMERS COMPLAIN OR ASK QUESTIONS ABOUT THE STABILITY OF THE COMPANY BECAUSE OF CERTAIN "DETAILS" THAT SEEM TO GO UNATTENDED. THE OFFICE UPKEEP/IMPROVEMENT BUDGET WAS CUT AND IT IS BEGINNING TO SHOW THE CONSEQUENCES OF THAT THROUGH "SMALL" MAINTENANCE AND UPKEEP DETAILS AROUND THE OFFICE. NO CHALLENGES WITH PHYSICAL WORKPLACE DETAILS OTHERS

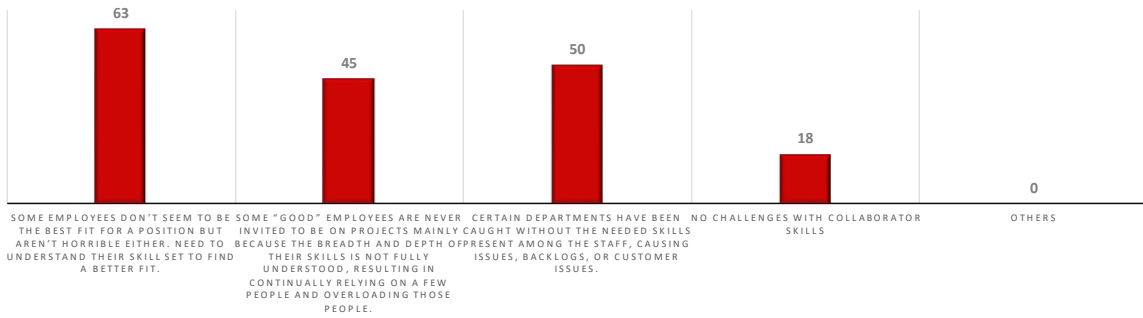
PRIORITY MANAGEMENT

Subject	Count	%	
There are several "big" projects on the horizon across departments and could have conflicting priorities.	47	31.54%	
The same employees are on multiple projects at the same time and need help in prioritizing how to spread their time and talent.	51	34.23%	
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.	51	34.23%	
No challenges with Priority Management	6	6.59%	93.41% With Challenges
Others	6	4.03%	
Total Times Given Scenarios Checked	149	6.59%	



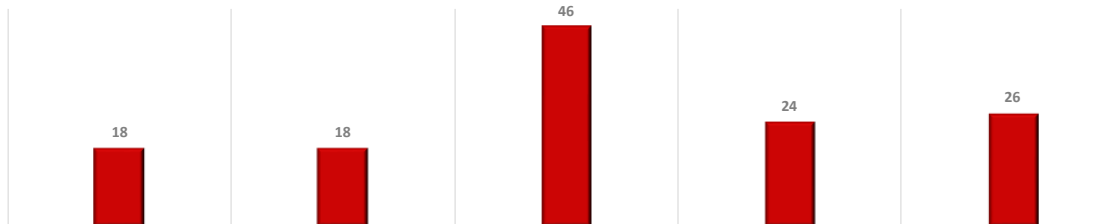
COLLABORATOR SKILLS

Subject	Count	%	
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.	63	39.87%	
Some "good" employees are never invited to be on projects mainly because the breadth and depth of their skills is not fully understood, resulting in continually relying on a few people and overloading those people.	45	28.48%	
Certain departments have been caught without the needed skills present among the staff, causing issues, backlogs, or customer issues.	50	31.65%	
No challenges with Collaborator Skills	18	19.78%	80.22% With Challenges
Others	0	0.00%	
Total Times Given Scenarios Checked	158	19.78%	



INTERNAL RESTRUCTURING

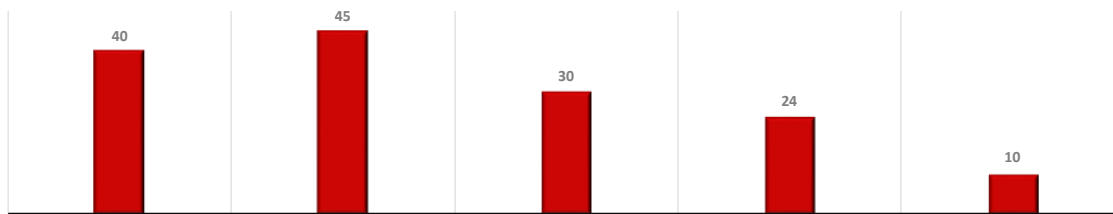
Subject	Count	%		
A mid- to high-level employee is retiring or leaving the company. The company wants to use the opportunity to see if there is a way to rethink and optimize the org chart.	18	21.95%		
Some departments have shrunk in headcount, and it might be time to consolidate people and departments.	18	21.95%		
There is new senior management or owners. The time is right to review the structure for possible changes to the org chart.	46	56.10%		
No challenges with Internal Restructuring	24	26.37%	73.63%	With Challenges
Others	26	31.71%		
Total Times Given Scenarios Checked	82	26.37%		



A MID- TO HIGH-LEVEL EMPLOYEE IS RETIRING OR LEAVING THE COMPANY. THE COMPANY WANTS TO USE THE OPPORTUNITY TO SEE IF THERE IS A WAY TO RETHINK AND OPTIMIZE THE ORG CHART. SOME DEPARTMENTS HAVE SHRUNK IN HEADCOUNT, AND IT MIGHT BE TIME TO CONSOLIDATE PEOPLE AND DEPARTMENTS. THERE IS NEW SENIOR MANAGEMENT OR OWNERS. THE TIME IS RIGHT TO REVIEW THE STRUCTURE FOR POSSIBLE CHANGES TO THE ORG CHART. NO CHALLENGES WITH INTERNAL RESTRUCTURING OTHERS

PROCESS ANALYSIS

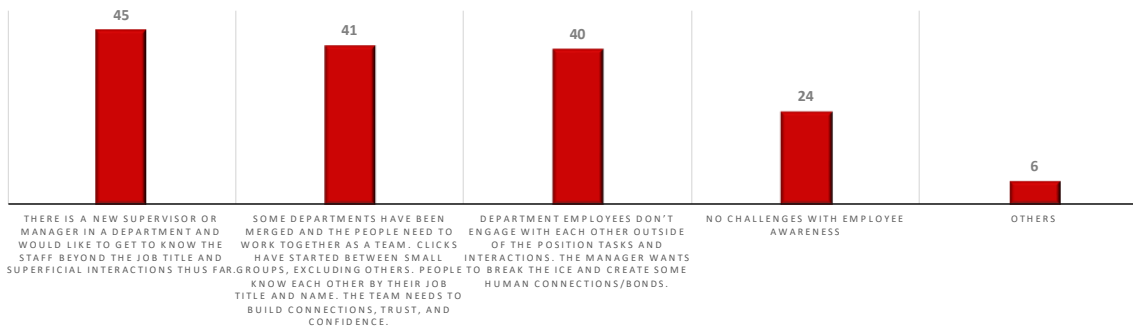
Subject	Count	%		
A process isn't "broken", but it could use some tweaking and updating to today's work and demands.	40	34.78%		
A new department head inherited "old" processes. He/she sees the need to review those processes with the staff to see where they want to or see needs for changes to be made.	45	39.13%		
The current business model and strategies have rendered certain processes outdated. A decision was made to take the time to do an update, upgrade, or overhaul to some core processes.	30	26.09%		
No challenges with Process Analysis	24	26.37%	73.63%	With Challenges
Others	10	8.70%		
Total Times Given Scenarios Checked	115	26.37%		



A PROCESS ISN'T "BROKEN", BUT IT COULD USE SOME TWEAKING AND UPDATING TO TODAY'S WORK AND DEMANDS. A NEW DEPARTMENT HEAD INHERITED "OLD" PROCESSES. HE/SHE SEES THE NEED TO REVIEW THOSE PROCESSES WITH THE STAFF TO SEE WHERE THEY WANT TO OR SEE NEEDS FOR CHANGES TO BE MADE. THE CURRENT BUSINESS MODEL AND STRATEGIES HAVE RENDERED CERTAIN PROCESSES OUTDATED. A DECISION WAS MADE TO TAKE THE TIME TO DO AN UPDATE, UPGRADE, OR OVERHAUL TO SOME CORE PROCESSES. NO CHALLENGES WITH PROCESS ANALYSIS OTHERS

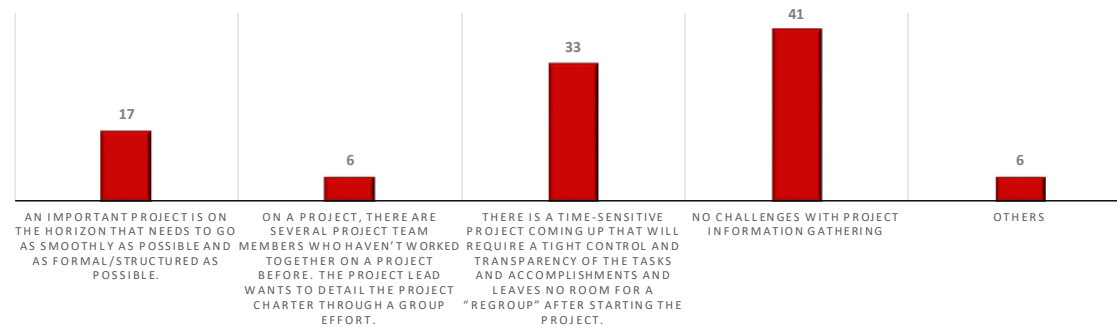
EMPLOYEE AWARENESS

Subject	Count	%		
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.	45	35.71%		
Some departments have been merged and the people need to work together as a team. Clicks have started between small groups, excluding others. People know each other by their job title and name. The team needs to build connections, trust, and confidence.	41	32.54%		
Department employees don't engage with each other outside of the position tasks and interactions. The manager wants to break the ice and create some human connections/bonds.	40	31.75%		
No challenges with Employee Awareness	24	26.37%	73.63%	With Challenges
Others	6	4.76%		
Total Times Given Scenarios Checked	126	26.37%		



PROJECT INFORMATION GATHERING

Subject	Count	%		
An important project is on the horizon that needs to go as smoothly as possible and as formal/structured as possible.	17	30.36%		
On a project, there are several project team members who haven't worked together on a project before. The Project Lead wants to detail the Project Charter through a group effort.	6	10.71%		
There is a time-sensitive project coming up that will require a tight control and transparency of the tasks and accomplishments and leaves no room for a "Regroup" after starting the project.	33	58.93%		
No challenges with Project Information Gathering	41	45.05%	54.95%	With Challenges
Others	6	10.71%		
Total Times Given Scenarios Checked	56	45.05%		



CURRICULUM DEVELOPMENT

Subject	Count	%
A new training program is coming up that requires a comprehensive program developed by a small group of contributors.	34	46.58%
A small task force has been tasked with revitalizing an old training program into something with a new approach.	22	30.14%
Customer training has not been well received, received high evaluation scores, or received satisfactory comments. A group of trainers has been tasked with coming up with something different.	17	23.29%
No challenges with Curriculum Development	24	26.37%
Others	16	21.92%
Total Times Given Scenarios Checked	73	26.37%

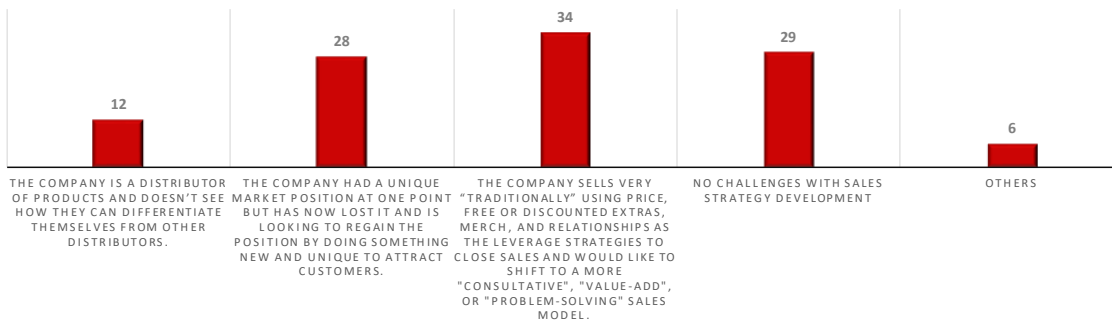
73.63% With Challenges



SALES STRATEGY DEVELOPMENT

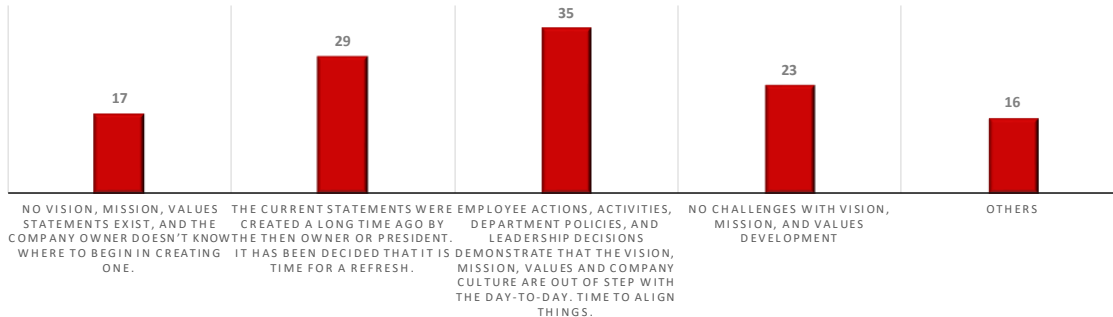
Subject	Count	%
The company is a distributor of products and doesn't see how they can differentiate themselves from other distributors.	12	16.22%
The company had a unique market position at one point but has now lost it and is looking to regain the position by doing something new and unique to attract customers.	28	37.84%
The company sells very "traditionally" using price, free or discounted extras, merch, and relationships as the leverage strategies to close sales and would like to shift to a more "consultative", "value-add", or "Problem-Solving" sales model.	34	45.95%
No challenges with Sales Strategy Development	29	31.87%
Others	6	8.11%
Total Times Given Scenarios Checked	74	31.87%

68.13% With Challenges



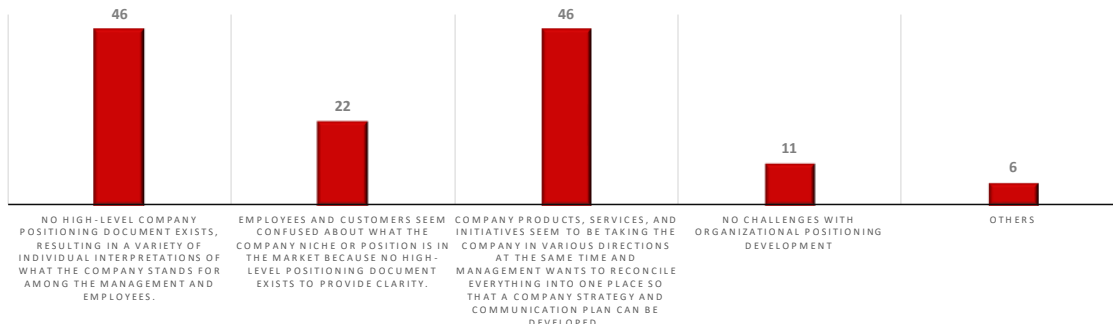
VISION, MISSION, VALUES DEVELOPMENT

Subject	Count	%	
No Vision, Mission, Values Statements exist, and the company owner doesn't know where to begin in creating one.	17	20.99%	
The current statements were created a long time ago by the then owner or President. It has been decided that it is time for a refresh.	29	35.80%	
Employee actions, activities, department policies, and leadership decisions demonstrate that the Vision, Mission, Values and Company Culture are out of step with the day-to-day. Time to align things.	35	43.21%	
No challenges with Vision, Mission, and Values Development	23	25.27%	74.73% With Challenges
Others	16	19.75%	
Total Times Given Scenarios Checked	81	25.27%	



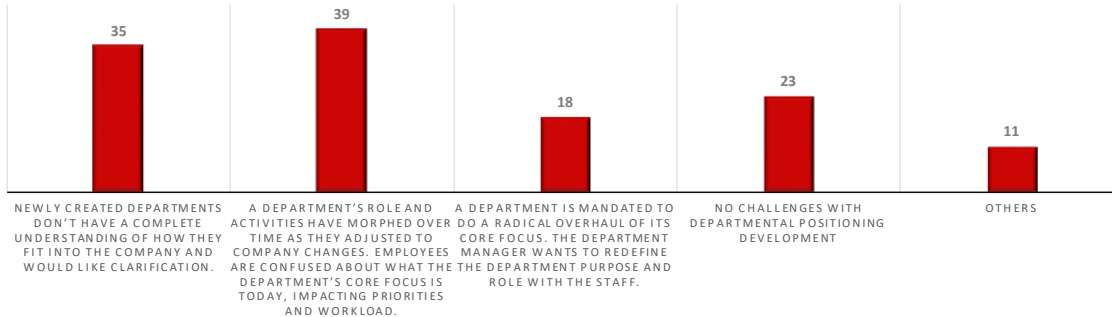
ORGANIZATIONAL POSITIONING DEVELOPMENT

Subject	Count	%	
No high-level company positioning document exists, resulting in a variety of individual interpretations of what the company stands for among the management and employees.	46	40.35%	
Employees and customers seem confused about what the company niche or position is in the market because no high-level positioning document exists to provide clarity.	22	19.30%	
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.	46	40.35%	
No challenges with Organizational Positioning Development	11	12.09%	87.91% With Challenges
Others	6	5.26%	
Total Times Given Scenarios Checked	114	12.09%	



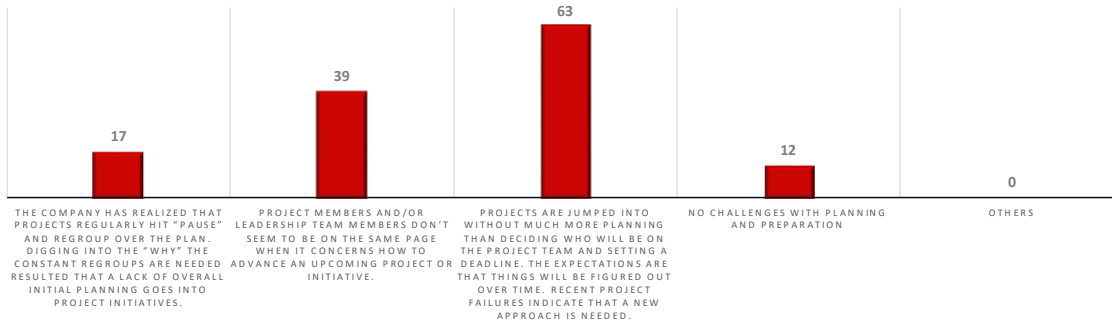
DEPARTMENTAL POSITIONING DEVELOPMENT

Subject	Count	%	
Newly created departments don't have a complete understanding of how they fit into the company and would like clarification.	35	38.04%	
A department's role and activities have morphed over time as they adjusted to company changes. Employees are confused about what the department's core focus is today, impacting priorities and workload.	39	42.39%	
A department is mandated to do a radical overhaul of its core focus. The department manager wants to redefine the department purpose and role with the staff.	18	19.57%	
No challenges with Departmental Positioning Development	23	25.27%	74.73% With Challenges
Others	11	11.96%	
Total Times Given Scenarios Checked	92	25.27%	



PLANNING AND PREPARATION

Subject	Count	%	
The company has realized that projects regularly hit "Pause" and regroup over the plan. Digging into the "why" the constant regroups are needed resulted that a lack of overall initial planning goes into project initiatives.	17	14.29%	
Project members and/or leadership team members don't seem to be on the same page when it concerns how to advance an upcoming project or initiative.	39	32.77%	
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 needed.	63	52.94%	
No challenges with Planning and Preparation	12	13.19%	86.81% With Challenges
Others	0	0.00%	
Total Times Given Scenarios Checked	119	13.19%	



HIGH-LEVEL SWOT ANALYSIS

Subject	Count	%
The company has never done an organizational SWOT analysis and doesn't know where or how to go about doing this activity.	17	36.96%
SWOT Analyses have been done in the past, but they take too much time from the leadership team, which results in revisiting the SWOT happens less frequently. Something more streamlined that requires less leadership time is needed.	24	52.17%
SWOT Analyses are periodically performed but the results are too detailed with mundane information. The activity's results need to be more focused and actionable.	5	10.87%
No challenges with High-Level SWOT Analysis	35	38.46%
Others	21	45.65%
Total Times Given Scenarios Checked	46	38.46%

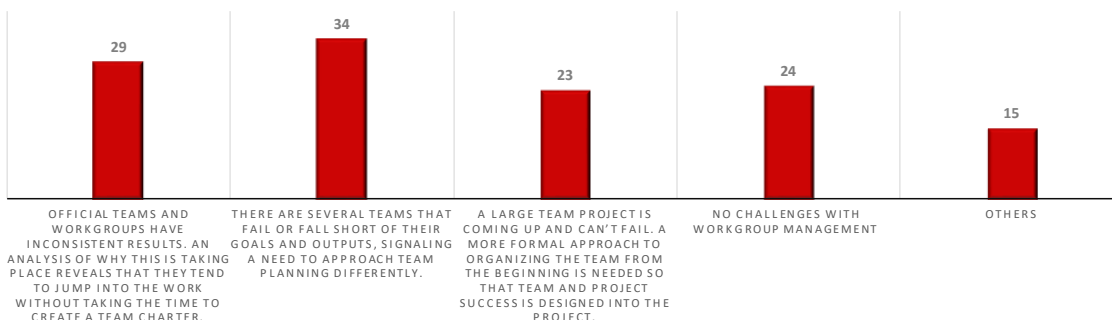
61.54% With Challenges



WORKGROUP MANAGEMENT

Subject	Count	%
Official teams and workgroups have inconsistent results. An analysis of why this is taking place reveals that they tend to jump into the work without taking the time to create a Team Charter.	29	33.72%
There are several teams that fail or fall short of their goals and outputs, signaling a need to approach team planning differently.	34	39.53%
A large team project is coming up and can't fail. A more formal approach to organizing the team from the beginning is needed so that team and project success is designed into the project.	23	26.74%
No challenges with Workgroup Management	24	26.37%
Others	15	17.44%
Total Times Given Scenarios Checked	86	26.37%

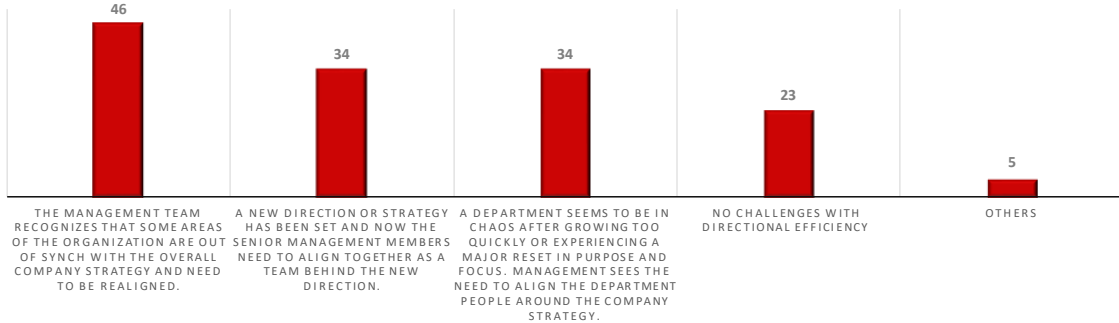
73.63% With Challenges



DIRECTIONAL EFFICIENCY

Subject	Count	%
The management team recognizes that some areas of the organization are out of synch with the overall company strategy and need to be realigned.	46	40.35%
A new direction or strategy has been set and now the senior management members need to align together as a team behind the new direction.	34	29.82%
A department seems to be in chaos after growing too quickly or experiencing a major reset in purpose and focus. Management sees the need to align the department people around the company strategy.	34	29.82%
No challenges with Directional Efficiency	23	25.27%
Others	5	4.39%
Total Times Given Scenarios Checked	114	25.27%

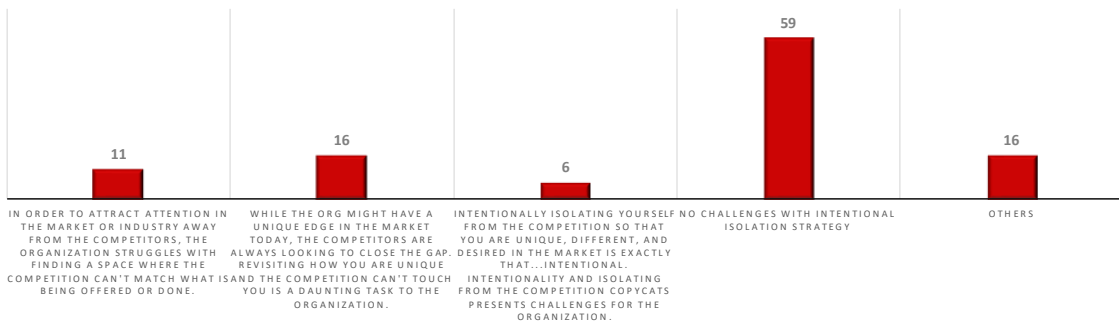
74.73% With Challenges



INTENTIONAL ISOLATION STRATEGY DEVELOPMENT

Subject	Count	%
In order to attract attention in the market or industry away from the competitors, the organization struggles with finding a space where the competition can't match what is being offered or done.	11	33.33%
While the org might have a unique edge in the market today, the competitors are always looking to close the gap. Revisiting how you are unique and the competition can't touch you is a daunting task to the organization.	16	48.48%
Intentionally isolating yourself from the competition so that you are unique, different, and desired in the market is exactly that...intentional. Intentionality and isolating from the competition copycats presents challenges for the organization.	6	18.18%
No challenges with Intentional Isolation Strategy	59	64.84%
Others	16	48.48%
Total Times Given Scenarios Checked	33	64.84%

35.16% With Challenges



Section 6: Scenario Popularity

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

Scenario Text	Count	Category
Processes were established pre-current technology and tools being used and no process analysis has been done to identify where waste can be eliminated.	68	WASTE
A person is getting his/her debut as a Project Leader and needs a structured approach on how to delegate tasks to project members.	64	DELEGATION
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.	63	COLLABORATOR SKILLS
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 needed.	63	PLANNING AND PREPARATION
No challenges with Intentional Isolation Strategy	59	INTENTIONAL ISOLATION STRATEGY DEVELOPMENT
No challenges with Physical Workplace Details	58	PHYSICAL WORKPLACE DETAILS
Employees complain that information needed to do work arrives late, or not at all, impacting their performance and productivity.	56	COMMUNICATION ANALYSIS
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.	56	PROCESS 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.	56	DELEGATION
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.	51	PRIORITY MANAGEMENT
The same employees are on multiple projects at the same time and need help in prioritizing how to spread their time and talent.	51	PRIORITY MANAGEMENT
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.	50	DELEGATION
Certain departments have been caught without the needed skills present among the staff, causing issues, backlogs, or customer issues.	50	COLLABORATOR SKILLS
Decisions are made without fully considering the impact it will have on the people doing the work.	48	DECISIONS
There is an inconsistent customer journey experience during the customer journey that management wants to make more consistent.	48	CUSTOMER SERVICE EXPERIENCE
A department that has priorities and workload changing every so many months finds it challenging to follow the company's strategic changes and initiatives.	47	TASK MANAGEMENT
There are several "big" projects on the horizon across departments and could have conflicting priorities.	47	PRIORITY MANAGEMENT
There is new senior management or owners. The time is right to review the structure for possible changes to the org chart.	46	INTERNAL RESTRUCTURING
No high-level company positioning document exists, resulting in a variety of individual interpretations of what the company stands for among the management and employees.	46	ORGANIZATIONAL POSITIONING DEVELOPMENT
The management team recognizes that some areas of the organization are out of synch with the overall company strategy and need to be realigned.	46	DIRECTIONAL EFFICIENCY
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.	46	TIME MANAGEMENT
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.	46	ORGANIZATIONAL POSITIONING DEVELOPMENT
There are complaints from employees that they can't get the work done because there are roadblocks, speedbumps, or obstacles in their way.	45	OVERCOMING BARRIERS
A new department head inherited "old" processes. He/she sees the need to review those processes with the staff to see where they want to or see needs for changes to be made.	45	PROCESS ANALYSIS
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.	45	EMPLOYEE AWARENESS

Observations

From the above table, several observations can be made:

1. Waste had the most scenarios selected across the survey but, curiously, it did not hit the Top 5 that much for the respondent group. Does this mean that the respondents just accept Waste as part of the way the company operates? Does this suggest complacency amongst the respondents? Do the respondents know that the waste is there but don't feel that it can be eliminated?
2. All three scenarios from Delegation fall into the Top 25 selected scenarios across the respondent pool. In fact, all three scored in the Top 12 of the 25.
3. One scenario in Collaborator Skills ranked #3 in the most frequently selected scenarios, but did not appear in the Top 5 Categories of things to fix or of concern from the respondent pool at a very high level. However, in the scenario selections, two of the three scenarios hit the Top 25 scenarios. This might imply that while collaborator skills is important and impactful to the respondents, they do not feel that anything can or will be done in that regard.
4. The same holds true for one scenario in Planning and Preparation, where it ranked 4th in the scenarios selected, but did not score high in the Top 5 critical Category selection.
5. No Challenges in Physical Workplace Details ranked very highly as a scenario. This should be taken as a positive by the company in that the respondents find the office or workplace to be adequate for them.
6. In 7th place for the most highly scored scenario is one of the scenarios from Communication Analysis, which also ranked in the Top 5 Categories selection.
7. One scenario in the Process Development Category stands out to the point of possibly meriting further investigation and review.
8. In 10th, 11th, and 17th position of the Top 25 most selected scenarios is Priority Management, which also enters into the 5th most important Category of interest to the respondents. All three scenarios resonated with the respondent pool and might indicate that a more in-depth exploration of that topic is merited.
9. Positions 14, 18, 19, 20, and 22 of the most popular scenarios (20% of the Categories) fall into the Organizational level prevue. In total, 232 Org-level scenarios (directly controlled, influenced, and impacted by senior management) were selected by the respondents as challenges they are facing today. Compared to all scenarios selected in the Top 25 scenarios, Org-level scenarios make up 17.8% of the challenges by the respondents.
10. While we noted that Organizational Positioning did not score high in the last section, two scenarios from that Category did show up in positions #19 and #22 of the Top 25 most commonly selected scenarios. This might lead to a contradiction of data that could deserve a more in-depth deep dive into the data.
11. From the Top Categories data, two hit the Top 5 for the company: Sales Strategy Development and Barrier Elimination. Interestingly, neither of these Categories had any scenario show up in the Top 25, most common scenarios list. What this might imply is that while the scenario is not that that frequent or see by many from the company, the impact is felt strongly enough to place it in the Top 5 Categories of urgent need.

Section 7: Category to Top 5 Relationships

The relation between how frequently the scenarios per Category were selected as being present in the organization versus the frequency that the respondents selected the Category in the Top 5 is interesting to review for outliers and anomalies. Conventional logic and wisdom would tell us that the Categories with the highest number of scenario selections would also be ranked in the Top 5 most frequently, and vice versa. This is not the case at all times and, therefore, merits showing the data tables and highlighting those instances.

Sorted by Scenario Selections	Scenario Selections	Top 5 Selections
DELEGATION	170	44
COLLABORATOR SKILLS	158	17
PRIORITY MANAGEMENT	149	33
EMPLOYEE AWARENESS	126	17
TASK MANAGEMENT	122	23
TIME MANAGEMENT	121	28
COMMUNICATION ANALYSIS	119	40
PLANNING AND PREPARATION	119	17
PROCESS DEVELOPMENT	116	34
OVERCOMING BARRIERS	116	29
PROCESS ANALYSIS	115	22
ORGANIZATIONAL POSITIONING DEVELOPMENT	114	12
DIRECTIONAL EFFICIENCY	114	5
CUSTOMER SERVICE EXPERIENCE	112	18
WASTE	109	6
DECISIONS	104	0
BRAINSTORMING	93	6
DEPARTMENTAL POSITIONING DEVELOPMENT	92	18
WORKGROUP MANAGEMENT	86	6
INTERNAL RESTRUCTURING	82	6
VISION, MISSION, VALUES DEVELOPMENT	81	11
SALES STRATEGY DEVELOPMENT	74	35
CURRICULUM DEVELOPMENT	73	17
PRODUCTS AND SERVICES	63	0
PROJECT INFORMATION GATHERING	56	5
HIGH-LEVEL SWOT ANALYSIS	46	0
PHYSICAL WORKPLACE DETAILS	44	0
INTENTIONAL ISOLATION STRATEGY DEVELOPMENT	33	6

Sorted by Top 5 Selections	Top 5 Selections	Scenario Selections
DELEGATION	44	170
COMMUNICATION ANALYSIS	40	119
SALES STRATEGY DEVELOPMENT	35	74
PROCESS DEVELOPMENT	34	116
PRIORITY MANAGEMENT	33	149
OVERCOMING BARRIERS	29	116
TIME MANAGEMENT	28	121
TASK MANAGEMENT	23	122
PROCESS ANALYSIS	22	115
CUSTOMER SERVICE EXPERIENCE	18	112
DEPARTMENTAL POSITIONING DEVELOPMENT	18	92
COLLABORATOR SKILLS	17	158
EMPLOYEE AWARENESS	17	126
PLANNING AND PREPARATION	17	119
CURRICULUM DEVELOPMENT	17	73
ORGANIZATIONAL POSITIONING DEVELOPMENT	12	114
VISION, MISSION, VALUES DEVELOPMENT	11	81
WASTE	6	109
BRAINSTORMING	6	93
WORKGROUP MANAGEMENT	6	86
INTERNAL RESTRUCTURING	6	82
INTENTIONAL ISOLATION STRATEGY DEVELOPMENT	6	33
DIRECTIONAL EFFICIENCY	5	114
PROJECT INFORMATION GATHERING	5	56
DECISIONS	0	104
PRODUCTS AND SERVICES	0	63
HIGH-LEVEL SWOT ANALYSIS	0	46
PHYSICAL WORKPLACE DETAILS	0	44

Observations

From the above tables, a few observations can be made:

Table 1 Observations: Scenario Selection Sort

To put the following numbers in context, the Mean Scenario Selections across the respondent data was 111 and the average score was 100 across the 28 Categories.

High Scenario Selection / Low Top 5 Selection

- Collaborator Skills was #2 in Scenario Selections (158) but only received 17 Top 5 Selections.
- Employee Awareness was #4 in Scenario Selections (126) but only received 17 Top 5 Selections.
- Planning and Preparation received 119 Scenario Selections but only 17 Top 5 Selections.
- Organizational Positioning Development received 114 Scenario Selections but only 12 Top 5 Selections.
- Directional Efficiency received 114 Scenario Selections but only 5 Top 5 Selections.
- Waste received 109 Scenario Selections but only 6 Top 5 Selections.
- Decisions received 104 Scenario Selections but did not receive a single Top 5 Selection.

Low Scenario Selection / High Top 5 Selection

- Sales Strategy Development received only 74 Scenario Selections but received 35 Top 5 Selections.
- Curriculum Development received only 73 Scenario Selections but received 17 Top 5 Selections.
- Project Information Gathering received only 56 Scenario Selections but was selected in the Top 5 5 times.
- Intentional Isolation Strategy Development received the least amount of Scenario Selections with only 33 scenarios checked, but the Category hit the Top 5 more than five other Categories with 6 selections.

Table 2 Observations: Scenario Selection Sort

As a reminder, the Mean Scenario Selections across the respondent data was 111 and the average score was 100 across the 28 Categories.

High Top 5 Selection / Low Scenario Selection

- Sales Strategy Development came in at 3rd place among the Top 5 Selections with only 74 Scenario Selections.
- Departmental Positioning Development was in the middle of the pack for Top 5 Selections (18 selections) but was below the Mean number of Scenario Selections with only 92.
- As previously mentioned, Collaborator Skills ended up in the middle of the Top 5 Selections (17) but had the second most Scenario Selections of all 28 Categories.

Low Top 5 Selection / High Scenario Selection

- Waste was very low in Top 5 Selections (6) but had over the Average number of Scenario Selections (109).
- Directional Efficiency came in almost the bottom of the Top 5 Selections list (5 selections) but was selected 114 times in the scenarios.
- Decisions was never selected in the Top 5 of the respondent pool but had 104 Scenario Selections.

Section 8: Report Conclusions / Interpretations

In the course of this extensive survey, encompassing the challenges faced by Lighthouse Financial Services, several critical observations and conclusions have come to light. 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:

Survey Respondent Diversity and Engagement

- A diverse range of roles participated in the survey, from employees to directors, indicating widespread engagement and a desire to contribute to the company's growth.
- A noteworthy 32% of respondents chose not to disclose their names, raising questions about transparency and potential areas of concern within certain departments or roles.

Category Scores and Priorities

- Process-related challenges emerged as the predominant concern, emphasizing the need for process optimization and efficiency improvements.
- Planning and People-related challenges also feature prominently, signifying the importance of long-term strategic planning and employee development.
- A total of 22 out of 28 categories revealed significant challenges, underscoring the need for a multifaceted approach to problem-solving.

Top 5 Analysis

- The top challenges identified by respondents consistently fall within the Process category, highlighting a critical area for improvement.
- Delegation and Sales Strategy Development emerged as top concerns, signaling the need for enhanced delegation skills and a refined sales strategy.
- Waste, while acknowledged as a challenge, is not prominently featured in the top 5, suggesting potential complacency or a lack of effective waste reduction strategies.
- Employee-related categories are underrepresented in the top 5, except for Time Management, indicating areas that require more attention and support.

Scenario Popularity

- Waste, despite being frequently selected, does not rank high in the top 5, suggesting a potential gap between recognition and action regarding waste management.
- Delegation and Collaborator Skills scenarios are widely recognized, emphasizing their importance for improving teamwork and collaboration.
- Priority Management resonates strongly with respondents, indicating a need for better time and task management.
- Organizational-level challenges comprise a significant portion of the identified issues, underscoring the impact of senior management decisions.

Category to Top 5 Relationships

Anomalies between scenario frequency and top 5 category selection suggest areas where perception may not align with actual challenges.

Scenario Selection Sort Observations

- Collaborator Skills, Employee Awareness, Planning and Preparation, Organizational Positioning Development, Directional Efficiency, Waste, and Decisions received high scenario selections but few top 5 selections, highlighting the need to address these prevalent yet underrepresented challenges.
- Sales Strategy Development, Curriculum Development, Project Information Gathering, and Intentional Isolation Strategy Development received fewer scenario selections but more top 5 selections, indicating their perceived importance might be higher than the data suggests.

Actionable Insights

- To address the identified challenges effectively, a holistic approach should be adopted, focusing on process optimization, strategic planning, and workforce development.
- Special attention should be given to areas like Collaborator Skills, Employee Awareness, and Planning and Preparation, as these challenges may be underestimated but are pervasive.
- Waste management strategies need to be reevaluated, considering the gap between recognition and action.
- Senior management should pay attention to organizational-level challenges and consider their impact on overall effectiveness.
- In conclusion, this report serves as a valuable roadmap for Lighthouse Financial Services to navigate its current organizational landscape. Understanding these challenges is the first step toward developing proactive strategies and fostering a culture of continuous improvement. By addressing these issues head-on, the organization can enhance its resilience, adaptability, and overall success in the ever-evolving business landscape.

While we can provide some general interpretations based on the information provided, it's important to remember that specific insights and recommendations for a company like Lighthouse Financial Services would require a deeper understanding of their unique context and operations. That said, here are some general interpretations that may apply:

Process Optimization is Paramount: The prominence of process-related challenges in the survey findings suggests that streamlining workflows, improving operational efficiency, and reducing bottlenecks should be top priorities. Implementing lean methodologies, automation, and continuous process improvement initiatives can help address these concerns.

Strategic Sales Focus: The emphasis on Sales Strategy Development in the top 5 challenges indicates a potential need for a more strategic and structured approach to sales and business development. This may involve refining sales processes, setting clear sales targets, and providing sales teams with the necessary tools and training.

Collaboration and Teamwork: The significance of Collaborator Skills and the presence of Workgroup Management challenges underscore the importance of fostering collaboration and teamwork within the organization. Encouraging open communication, team-building activities, and cross-functional training can enhance collaboration among employees.

Waste Management: The recognition of Waste as a challenge, although not highly prioritized, suggests an opportunity for cost reduction and resource optimization. Conducting waste audits and implementing sustainable practices can help minimize waste and reduce operational costs.

Employee Development: The presence of challenges related to Employee Awareness and Time Management highlights the need for ongoing employee development and training programs. Providing employees with the necessary skills and resources can improve overall productivity and job satisfaction.

Senior Management's Role: The identification of Organizational-level challenges emphasizes the role of senior management in addressing strategic issues. Senior leaders should focus on effective decision-making, organizational positioning, and aligning the company's vision with its mission and values.

Data-Driven Decision-Making: Utilizing data from the survey, Lighthouse Financial Services can adopt a data-driven approach to prioritize and address challenges. Regularly analyzing employee feedback and survey data can guide strategic decision-making and measure the impact of improvement initiatives.

Culture of Continuous Improvement: To address the identified challenges effectively, it's crucial to foster a culture of continuous improvement within the organization. Encouraging employees at all levels to identify and suggest solutions to challenges can contribute to long-term success.

These interpretations and insights should serve as starting points for Lighthouse Financial Services to develop tailored strategies and action plans.

Section 9: Recommendations

Based on the data and observations provided, here are 10 specific recommendations correlated to the data statistics:

Implement Process Optimization Methodologies: Given the prevalence of process-related challenges and a median score of 100, consider implementing lean methodologies such as Six Sigma to streamline operations, reduce waste, and enhance efficiency (Category Scores).

Strategic Sales Training (Sales Strategy Development): Since Sales Strategy Development is a top concern, invest in strategic sales training programs to equip sales teams with the skills and strategies needed to meet objectives (Top 5 Analysis).

Collaboration Workshops (Collaborator Skills): Address the significant gap between high scenario selections (158) and low top 5 selections (17) by conducting collaboration workshops to enhance cross-functional teamwork (Scenario Selection Sort Observations - Table 1).

Enhance Employee Training (Employee Awareness): Close the gap between high scenario selections (126) and low top 5 selections (17) by offering more comprehensive employee training programs that improve awareness and engagement (Scenario Selection Sort Observations - Table 1).

Refine Waste Management Strategies (Waste): Given the recognition of waste as a challenge (109 scenario selections), develop and implement waste reduction strategies, and provide training to reduce resource wastage (Scenario Selection Sort Observations - Table 1).

Time Management Workshops (Time Management): Since Time Management is the only employee-related category in the top 5, offer time management workshops and tools to enhance productivity and help employees manage their tasks more effectively (Top 5 Analysis).

Cross-Functional Training (Workgroup Management): Address the disparities in workgroup management skills by offering cross-functional training programs to improve team leadership and collaboration (Category Score Details).

Data-Driven Decision-Making Culture (Scenario Popularity): Promote a culture of data-driven decision-making by regularly analyzing survey data, conducting sentiment analysis, and involving employees in decision-making processes (Scenario Popularity).

Strategic Planning Initiatives (Planning and Preparation): Given the high number of scenario selections (119) but low top 5 selections (17) in Planning and Preparation, invest in strategic planning initiatives to bridge this gap (Scenario Selection Sort Observations - Table 1).

Senior Leadership Training (Organizational Positioning Development): To address the challenges in Organizational Positioning Development, consider providing senior leaders with training and resources to make more effective strategic decisions (Scenario Selection Sort Observations - Table 1).

These recommendations align with the specific challenges and observations identified in the survey data, offering a next-step strategic roadmap for Lighthouse Financial Services to address its most pressing issues and achieve sustainable improvements.

Section 10: The 28 Survey Category Descriptions (in alphabetical order)

Barrier Elimination

Once you know where you want to go as an organization and begin your journey, you will no doubt encounter barriers, hurdles, and other obstacles along the way. By learning how to better identify and eliminate these obstacles that are prohibiting forward progress, you will open the path to change in a positive, constructive way that will include employees at all levels in your organization.

- Projects or initiatives are stuck or advancing too slowly for the company to meet their goals.
- There are complaints from employees that they can't get the work done because there are roadblocks, speedbumps, or obstacles in their way.
- What seems "easy" to move forward on by one person is "difficult" for another person and it is important to understand the difficult issues.

Brainstorm Management

Brainstorming sessions often fail to produce the kind of results one had hoped to achieve for the simple reason that there is a lack of structure guiding the session. The brainstorming session also often falls victim to strong personalities that dominate the session and prohibit the quieter participants from contributing in ways that are within their comfort zone. Having structure without stifling creativity allows the best ideas to reach the table for consideration.

- Brainstorm or idea generation sessions are dominated by certain people, prohibiting everybody to participate.
- Brainstorm or idea generation sessions lack structure and focus. They are side railed too easily and fail to produce results.
- Brainstorm or idea generation sessions are self-run. There is no facilitator present to guide the session to be completed in a timely manner.

Collaborator Skills Analysis

Knowing what skills your employees possess, compared to what skills are needed for their position, and identifying where the skills gaps exist (potentially leaving your department vulnerable) is vital knowledge. On the flip side, your staff may possess skills that are not being tapped into simply because you didn't know that the people had the skills. Having a profile of each employee can help managers make duty assignments with more ease and certainty.

- Some employees don't seem to be the best fit for a position but aren't horrible either. How to find their best fit based on their skill set?
- Some "good" employees are never invited to be on projects mainly because the breadth and depth of their skills is not fully understood. The company needs to learn more about these people so that they can avoid continually relying on a few people or overloading those people.
- Certain departments have been caught without the needed skills present among the staff, causing issues, backlogs, or customer issues.

Communications Complaints

It is always interesting to hear employees say that they feel there is a lack of communication in the organization when we are more technologically connected today than ever before. The question isn't "do we" or "don't we" communicate. The real question is "how do we communicate information to satisfy the varied needs of the employees?" Making sure the lines of communication are open, the vehicles for

communication are in place, and the employees understand the value of communication for completing their jobs are all critical for every organization.

- There is a general perception or evidence that there is poor or inadequate communication in the company and a task force or team has been assembled to look for ways to improve.
- Employees complain that information needed to do work arrives late, or not at all, impacting their performance and productivity.
- People who need information must babysit the sender to get the information in a timely manner, causing bottlenecks and frustration.

Curriculum Development

Both schools and organizations have a need for training their people – whether that person is a student or an employee. Having a curriculum that flows from level to level and addresses all four areas of skills development is crucial to a learner's success. Without material and information that flows, provides smooth transitions and hand-offs, or continuity, learners struggle to reach the required level of proficiency while educators/trainers become frustrated and ineffective.

- A new training program is coming up that requires a comprehensive program developed by a small group of contributors.
- A small task force has been tasked with revitalizing an old training program into something with a new approach.
- Customer training has not been well received, scored high evaluation scores, or received satisfactory comments. A group of trainers has been tasked with coming up with something different.

Customer Service Complaints

Without customers we have no reason for staying in business. We all strive to have superior customer service, but do we know what our customers really think about our organization, our products, our services, our policies, our delivery times, and countless other topics? By analyzing the customer experience from multiple angles, organizations are able to identify areas in need of improvement as well as identify reasons that explain why customers come back again and again.

- The company has received poor customer satisfaction survey results and/or customer complaints.
- There is a high level of customer churn or cancellations of services, and the company wants to analyze possible reasons.
- There is an inconsistent customer journey experience during the customer journey that management wants to make more consistent.

Decision Ripple Effect

We make decisions every day with the intention of creating a positive impact on the organization somewhere in the future. Yet several decisions end up having a negative impact either on the organization's system (people, processes, etc.) or directly on the employees as the decision is communicated throughout the organization. Anticipating the impact beforehand and developing action plans to ensure that all decisions have a positive impact on the organization can reduce stress, wasted time, and emotional reactions.

- Decisions are made without fully considering the impact it will have on the people doing the work.

- Certain leadership members' decisions have created chaos in the past because of poorly anticipating the impact on the people and processes.
- There are complaints about decisions made in the past that have increased workload or created confusion within a process and now the company wants to avoid those same issues.

Delegation Resistance

While employees complain that managers don't delegate enough, managers may have valid reasons for keeping certain tasks and decisions close to their vest. Managers agree that delegating selected tasks and decisions to the staff can build skills, boost morale, and improve workflow. However, for delegation to be successful, the manager needs to be comfortable with the delegation process – defining the delegation process, establishing the feedback loops, making sure the person being delegated to has the necessary information and skills, and then allowing the staff to take the reins.

- An employee has been promoted to the department supervisor role and is not willing to let go of the work from the old position.
- 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.
- A person is getting his/her debut as a Project Leader and needs a structured approach on how to delegate tasks to project members.

Departmental Positioning Clarity

A department cannot easily measure change efforts without first having a firm understanding of where they are. Once all department staff understand how the department fits into the organization, it is much easier to effect changes and understand the impact these changes will have on the department as a whole. Additionally, a departmental positioning guide creates a sense of belonging and contribution for the employees as they learn how their daily work helps the organization reach its strategic goals.

- Newly created departments don't have a complete understanding of how they fit into the company and would like clarification.
- A department's role and activities have morphed over time as they adjusted to company changes. Employees are confused about what the department's core focus is today, impacting priorities and workload.
- A department is mandated to do a radical overhaul of its core focus. The department manager wants to redefine with department purpose and role with the staff.

Details/Perception Management

The devil is in the details. We've heard that over and over. And organizations are not immune to the need to pay attention to details. Whether it is worn carpet in the entryway, a cracked window in the warehouse, a grumpy receptionist, or a customer-unfriendly return policy, these things create perceptions for your staff and your customers. Left unattended, the perception turns into reality, and once a reality in your organization, people might begin to believe that management doesn't care, so why should they? And so, the downward spiral begins...

- The company is in an older office setting, and it is obvious that some attention is needed to the physical attributes of the office.
- Customers complain or ask questions about the stability of the company because of certain "details" that seem to go unattended.
- The office upkeep/improvement budget was cut and it is beginning to show the consequences of that through "small" maintenance and upkeep details around the office.

Directional Inefficiency

Boats go faster when everybody is rowing in synch, with the same power, and in the same direction. An organization is no different. Successful organizations learn to synchronize all activities that help them move in the forward direction toward defined goals. They identify any distractions that might impede their movement or slow them down. Getting everybody rowing together, as a team, creates efficient and effective progress.

- The management team recognizes that some areas of the organization are out of synch with the overall company strategy and need to be realigned.
- A new direction or strategy has been set and now the senior management members need to align together as a team behind the new direction.
- A department seems to be in chaos after growing too quickly or experiencing a major reset in purpose and focus. Management sees the need to align the department people around the company strategy.

Eliminating Process Waste

In a world where rising operating costs, lower margins, downsizing, and the need to become “lean” is hitting all organizations across all industries, the last thing we can afford is processes and procedures filled with wasteful activity. Amazingly, some experts feel that over 50% of all process-related tasks add no value and should be considered waste. Identifying various forms of waste and developing waste elimination plans will help an organization reach its “lean” goals.

- There are perceptions that people waste time or that processes are slow or wasteful. Management wants to investigate the perceptions by analyzing key processes.
- Process costs are high and need to come down, but people don’t know where to start looking for cost savings within a process.
- Processes were established pre-current technology and tools being used and no process analysis has been done to identify where waste can be eliminated.

Employee Awareness/Comradery

Your employees are diverse in everything from their generation to their value system. Yet they still need to work together as a team and find ways to use each other’s experiences, expectations, and internal drive to get the work done as efficiently and effectively as possible. While some aspects of how a person is “wired” are obvious, other aspects are not seen in the workplace. By learning about 20 information points that help define who a person is, your staff will have more success working together on a daily basis.

- 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.
- Some departments have been merged and the people need to work together as a team. Clicks have started between small groups, excluding others. People know each other by their job title and name. The team needs to build connections, trust, and confidence in each other.
- Department employees don’t engage with each other outside of the position tasks and interactions. The manager wants to break the ice and create some human connections/bonds.

High-Level SWOT Analysis

Every couple of years, organizations should assess the current state of their organization (strengths and weaknesses) as well as future opportunities and threats from outside by doing a SWOT analysis. Ideally, contributors to the analysis only focus on the most critical and pertinent information to help drive their

decisions and direction. By capturing SWOT information from multiple perspectives (people or levels in the organization), management can identify gaps and can work to fill those gaps.

- The company has never done an organizational SWOT analysis and doesn't know where or how to go about doing this activity.
- SWOT analyses have been done in the past, but they take too much time from the leadership team which results in revisiting the SWOT happens less frequently. Something more streamlined that requires less leadership time is needed.
- SWOT Analyses are periodically performed but the results are too detailed in mundane information. The activity's results need to be more focused and actionable.

Internal Restructuring Needed

Restructuring an organization or a department can be a complicated task, especially if the management team or the manager have never gone through the exercise before. The challenge facing management is how to disconnect the departments or people and reconnect them to form a picture that makes sense to the staff and the workflow. When pieces don't seem to make sense to the employees, they spend valuable time trying to understand or second guess the logic behind the changes. By creating a visual of the new structure from various perspectives before announcing it to the staff, management can anticipate aspects of the reorganization that might create confusion and wasted time. Taking the initiative to provide additional information explaining the changes will go far with the staff.

- A mid- to -high-level employee is retiring or leaving the company. The company wants to use the opportunity to see if there is a way to rethink and optimize the org chart.
- Some departments have shrunk in headcount, and it might be time to consolidate people and departments.
- There is new senior management or owners. The time is right to review the structure for possible changes to org chart.

Organizational Positioning Clarity

As an organization grows and adds staff and layers, it becomes increasingly important to ensure that all the employees have a firm understanding of how the organization strategically positions itself in the marketplace. This information creates a clear vision and direction for the individual departments and the employees to follow. Without a top-level positioning document to educate the staff, an organization risks having people stray from the path, wasting time and resources along the way.

- No high-level company positioning document exists resulting in a variety of individual interpretations of what the company stands for among the management and employees.
- Employees and customers seem confused about what the company niche or position is in the market because no high-level positioning document exists to provide clarity.
- Company products, services, and initiatives seem to be taking the company in various directions at the same time and the management wants to reconcile everything into one place so that a company strategy and communication plan can be developed.

Planning and Preparation

Often, we know about upcoming changes in time to prepare our people, processes, and training in such a way that the change is as efficient, effective, and painless as possible. Other times we will need to conduct a strategic planning session with our staff on how the organization (and specific departments) will reach its future goals. In either case, employees buy-in to the change initiatives when they are involved in the preparation and planning process.

- The company has realized that projects regularly hit “Pause” and regroup over the plan. Digging into the “why” the constant regroups are needed resulted that a lack of overall initial planning goes into project initiatives.
- Project members and/or leadership team members don’t seem to be on the same page when it concerns how to advance an upcoming project or initiative.
- Projects are jumped into without much more planning than deciding who will be on the project team and setting a deadline. The norm and expectations are that things will be figured out over time. But some recent project failures indicate that a new approach is needed.

Priority Conflict Management

With certain projects, the laundry list of things to do seems to go on forever while the resources available (and their skills) seem to be on the short side. Aligning the tasks to complete with the resources and their skills, considering deadlines, milestones, and dependencies can be a daunting task without a structured approach to tackling the list of to-do items.

- There are several “big” projects on the horizon across departments and could have conflicting priorities.
- The same employees are on multiple projects at the same time and need help in prioritizing how to spread their time and talent.
- 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.

Process Development

Have you ever just wanted to build a process from scratch – your way? Have you ever been put into a situation where there were no formalized processes, resulting in inefficiencies on several fronts? Is your company growing in ways that require new processes to be carefully, yet quickly defined and developed? Starting with a blank sheet of paper can be overwhelming without a guided step-by-step methodology to map out a process and fully understand what is needed to launch the process.

- 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.
- There are informal processes that need to be documented for ISO or audit purposes.
- The company has a process that is so old, outdated, broken, or just beyond the tweaking point that the company just wants to start over and build a new process from scratch.

Process Improvements

Organizations are made up of a myriad of interconnected processes that require periodic review and improvement. Managers need to make sure everybody involved knows how they contribute to the process, how their tasks affect others in the process, and how their work contributes to the organization. Whether small, incremental change or vast process re-engineering is the goal, working with the process players is the most effective way to initiate improvements.

- A process isn’t “broken”, but it could use some tweaking and updating to today’s work and demands.
- A new department head inherited “old” processes. He/she sees the need to review those processes with the staff to see where they want to or see a need for changes to be made.
- The current business model and strategies have rendered certain processes outdated. A decision was made to take the time to do an update, upgrade, or overhaul to some core processes.

Product Upgrades and Refreshing

Organizations are expected to reinvent themselves, their products, and their services on a regular basis, if they want to stay competitive in the marketplace. That reinvention can be quite an expensive investment, depending on the extent of the changes. However, before abandoning a product and beginning development on something totally new, organizations should first look at their existing products and services from all angles to see where smaller, more manageable updates can be made, while still pleasing the customer. By analyzing products and services from 20 different perspectives, organizations may be able to update a product or service without being forced to undergo a total redesign.

- Products or services need to be updated but there is no official “Product Manager” on staff to drive the updating/upgrading project. A structured framework is needed to guide the process.
- There are complaints about current products or services and a product revisit, review, upgrade, update, or analysis is needed.
- A product or service has more than three years in the market without having a facelift or update. The company wants to review if anything should be done about that.

Project Definition

Important projects deserve time to properly scope the work to be done. Without a clear objective, scope, and approach spelled out, the project team cannot align their time, energy, and talent to make the project a success. Additionally, without a clear scope, team members aren’t able to define deliverables, secure project funding, or define tangible returns for the organization.

- An important project is on the horizon that needs to go as smoothly as possible and as formally/structured as possible.
- On a project, there are several project team members who haven’t worked together on a project before. The Project Lead wants to detail the Project Charter through a group effort.
- There is a time-sensitive project coming up that will require tight control and transparency of the tasks and accomplishments and leaves no room for a “Regroup” after starting the project.

Strategy Against Competitors

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Task/Workload Management

Making sure you have the right people in the right positions allows departments and organizations to meet their goals in an efficient and effective manner. Balancing workloads across employees with different skill sets, interests, and priorities can be a constant challenge for even the most seasoned manager. Purging unnecessary tasks and setting priorities keeps a department lean, mean, and focused.

- A new department supervisor or manager doesn't really know what the various departments employees do in any sort of detail outside their job title and broad job description.
- A department will be adding or losing staff and is wondering how to distribute the workload with the new staff.
- A department that has priorities and workload changing every so many months finds it challenging to follow the company's strategic changes and initiatives.

Time Management

While some people seem to manage their workload with ease, other people always seem to struggle to meet deadlines. Is it a case of time mismanagement or mismanaged workloads? In either case, understanding how people spend their days, what types of tasks they spend their time on, and looking for ways to streamline their workload can dramatically improve productivity.

- A department has identified collaborators who regularly miss deadlines and expect that the root cause is poor time management skills. A deep dive is needed to resolve the problem.
- 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.
- 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.

Vision/Mission/Values Clarity

Every large organization has them and lives by them. Most mid-size organizations understand the need to have them if they want to drive aligned growth across the employees and divisions. Most small companies feel that having a defined Vision, Mission Statement, and Set of Values is overkill and only a benefit for bigger companies. Not so. Small companies need alignment, focus, and direction just as much as the bigger guys do. It's critical to success.

- No Vision, Mission, Values Statement exists, and the company owner doesn't know where to begin in creating one.
- The current statement was created a long time ago by the then owner or President. It has been decided that it is time for a refresh.
- Employee actions, activities, department policies, and leadership decisions demonstrate that the Vision, Mission, Values and Company Culture are out of step with the day-to-day. Time to align things.

Workgroup Success Management

High-performing teams can produce extraordinary results time and time again. However, so many teams and workgroups that are put together for short projects fail to produce their desired results. Very often, the problem is not in what the team was expected to accomplish, but rather that the team was not organized for success from the beginning. Proper planning and preparation should be the first order of business for the team members if they want to ensure their success.

- Official teams and workgroups have inconsistent results. An analysis of why this is taking place reveals that they tend to jump into the work without taking the time to create a Team Charter.
- There are several teams that fail or fall short of their goals and outputs, signaling a need to approach team planning differently.
- A large team project is coming up and can't fail. A more formal approach to organizing the team from the beginning is needed so that team and project success is designed into the project.

Section 11: Who are we?

Established in 2003, **Innovative Management Tools (IMT)** has evolved over two decades, originally focused on creating 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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