

The Strategic Alignment Survey

Organization-Wide Report
At July 2005

For:

Company ABC



Presented By:

integro
leadership institute

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The Strategic Alignment Survey™

Employee *alignment* is critical. When employees are not aligned with the organization's goals and strategies, the right work does not get done... or it does not get done right. What many managers fail to realize is that if employees are not *aligned* with the organization's *Purpose, Values* and *Vision*, they are very unlikely to be aligned with your goals, strategies and processes.

When employees feel connected to the purpose and vision of the organization, they have a clear understanding of how important the products and services you provide are to your customers and the community. They also see a clear connection between what they do and the success of your organization in fulfilling its purpose.

As a result, *aligned employees* see their work as meaningful. They look forward to coming to work, and have a sense of pride in what they do and the organization they work for.

When there is a high level of *trust* throughout the organization:

- Expectations are clear, disagreements are discussed and resolved and individual performance is discussed and agreed on without having to rely on a formal process.
- Information is exchanged freely as needed, feelings and opinions are openly discussed and people do not have hidden agendas.
- Differences are valued, employees feel respected for their contribution, and have input into how the organization can be more successful.
- People keep their commitments, strive for excellence in everything they do, and can count on each other for support.

This is a place where people want to work... a workplace based on *trust* and *personal responsibility*.

The *Strategic Alignment Survey*™ measures four key areas that have an impact on employee alignment and engagement, and provides feedback by division, business unit, location, and work teams across the organization. The four sections of this report are:

Section One – Kinds of People

- Whether employee behavior is *Self-Directed, Rebellious* or *Compliant*

Section Two – Group Trust Level Report

- The degree to which group members practice *trust building behaviors*

Section Three – Values That Build Trust

- The *values* that must be present for trust to develop

Section Four – Group Alignment Report

- The degree to which group members are *aligned* with the organization's *Purpose, Values, Vision, Goals, Procedures* and *Roles*

Section One – Kinds of People

This section is measuring employees' perceptions of the behavior of their co-workers, based on the *kinds of people* described in Integro's *Personal Responsibility Model*.

This model identifies three *kinds of people*:

Self-Directed – people who are personally responsible, and two kinds of *Other-Directed* people – those who tend to be **Compliant**, and those who are **Rebellious**.

The survey asks employees to respond to the following question:

What percentage of the people that you work with would fit each of the following three descriptions? Please ensure your total for all three equals 100%.

- Person 1** - Will not be told what to do; feels frustrated; feels entitled to better treatment; does just what they have to do to keep their job; tends to blame others when things go wrong. (**Rebellious**)
- Person 2** - Does what they are asked to do; does not feel committed to the organization... it's just a job; sticks to the rules and stays out of trouble. (**Compliant**)
- Person 3** - Is committed to the organization; open-minded and willing to learn; accepts personal responsibility for their performance; uses initiative and creativity to improve results. (**Self-Directed**)
(Respondents to the survey do not see the labels shown in parenthesis.)

Reading the Graph: The pie chart shows the average percentage of scores for the three descriptions, for all employees in this group that respond to the questions.

Important Note: While we have used the title “Kinds of People” for this section, we are really talking about how employees are currently behaving. It is important to understand that Rebellious and Compliant behaviors are natural responses from employees who perceive themselves to be in an Authoritarian environment.

It is also possible for the same person to use all three types of behavior in one day.

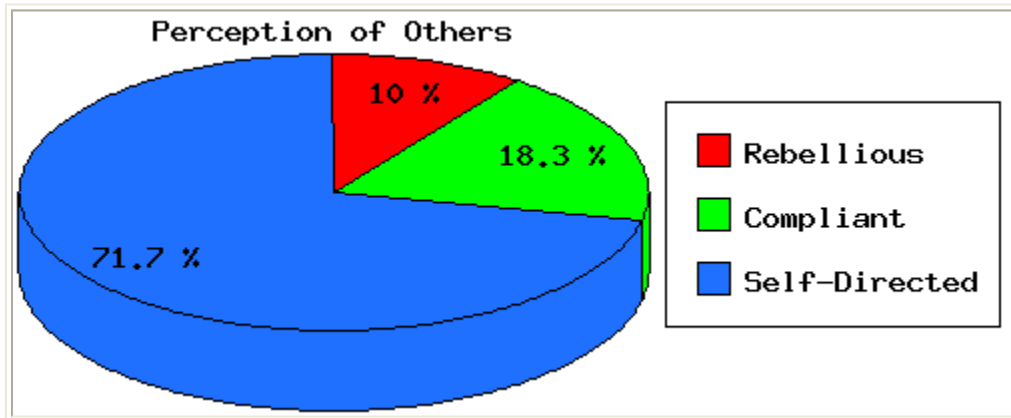
Therefore this result is not a *portrait* of the employees in your group, merely a *snapshot* of how they were behaving at the time this survey was taken.

Key Questions:

- How do you need your employees to behave to achieve your objectives?
- Is your present leadership approach going to allow your employees to be *self-directed*?
- What kind of culture do you need to create to attract and retain *Self-Directed* people, and get your currently *Rebellious* and *Compliant* people to behave in a *self-directed* way?

Section 1 - Kinds of People

Employee behavior perceived by coworkers
Company ABC
Organization-wide Report
July 2005



Overall Group Values		Int'l Average
Rebellious	10.0 %	11%
Compliant	18.3 %	30%
Self-Directed	71.7 %	59%

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Section One – Kinds of People

Kinds of People Comparison Organization Wide

Reading the Report:

This report shows a summary of the **Kinds of People Report** – the percentage of each of the three types of people that employees perceive in the workplace. The table shows the percentages of *Rebellious*, *Compliant* and *Self-Directed* people for each group within the organization, compared to the organization as a whole, and the International Average. The average score for the whole organization is shown at the top of the table, with each group identified for reporting purposes listed below.

Section 1 - Kinds of People Summary

Employee behavior perceived by coworkers

Company ABC

Organization-wide Report

July 2005

	Rebellious	Compliant	Self-Directed
Overall	10.0 %	18.3 %	71.7 %
Group Breakdown			
Group	Rebellious	Compliant	Self-Directed
Accounting	3.8 %	15.0 %	81.2 %
Sales and Marketing	12.5 %	30.0 %	57.5 %
Customer Service	10.0 %	18.3 %	71.7 %
Operations	4.2 %	15.0 %	80.8 %
	Rebellious	Compliant	Self-Directed
International Average	11%	30%	59%

Section Two - Group Trust Level Report

This report is measuring the degree to which employees perceive the four *elements of trust* are present in their work group. The elements of trust and the behaviors measured are:

Congruence - the degree to which employees (1) have clearly defined and agreed behavioral standards, (2) make sure expectations are clear, (3) are willing to discuss and resolve disagreements and (4) practice what they preach.

Openness - the degree to which employees (1) openly share information and opinions, (2) discuss feelings with one another, (3) do not withhold relevant information from one another, and (4) are comfortable receiving feedback from each other.

Acceptance - the degree to which employees (1) are really listened to, (2) are accepted for who they are, (3) feel it is safe to express conflicting views, and (4) encourage and support each other.

Reliability - the degree to which employees (1) can rely on each other to get the job done, (2) do what they say they will do, (3) take ownership of their jobs and, (4) have high standards of quality in everything they do.

Although it is common to get a spread of responses on each scale, there is usually a tendency for some consistency in group scores, so the elements that need most work can easily be identified.

The percentages for each element represent the raw scores from the questions asked compared to the maximum possible score.

- A score of 70% for Openness is saying that the total aggregate score for the team is 70% of what is possible, not that 70% of the team is open.
- There is no way of looking at the report and calculating this percentage.

Often, the most underrated element is *Acceptance*. It is this element that creates the climate for the other three to increase. When team members feel that they are valued and respected, they are more comfortable being open and honest with each another.

Key Questions:

- Which of the *Elements of Trust* are we best at and worst at?
- What are the factors that contribute to our strengths and areas we need to improve?
- What barriers need to be removed to increase the trust level on all four elements?

Section 2 - Group Trust Level Report

The level of Trust Building behaviors
Company ABC
Organization-wide Report
July 2005

		Group Trust Level	Int'l Average
Congruence	<p style="text-align: center;">Trust Level</p>	55.5%	69.0%
Openness	<p style="text-align: center;">Trust Level</p>	64.3%	69.0%
Acceptance	<p style="text-align: center;">Trust Level</p>	73.2%	76.0%
Reliability	<p style="text-align: center;">Trust Level</p>	62.8%	79.0%

Section Two - Group Trust Level

Group Trust Level Comparison Organization Wide

Reading the Report:

This report shows a summary of the **Group Trust Level** – the degree to which employees perceive each *Element of Trust*[™] being present in their work group. The table shows the scores for each element, *Congruence*, *Openness*, *Acceptance* and *Reliability* as a percentage of the maximum possible score for each group within the organization, compared to the organization as a whole, and the International Averages. The average score for the whole organization is shown at the top of the table, with each group identified for reporting purposes listed below.

Section 2 - Group Trust Level Summary

The level of Trust Building behaviors
Company ABC
Organization-wide Summary
July 2005

	Congruence	Openness	Acceptance	Reliability
Overall	60.5 %	76.0 %	88.0 %	73.1 %
Group Breakdown				
Group	Congruence	Openness	Acceptance	Reliability
Accounting	56.2 %	68.8 %	87.5 %	78.1 %
Sales and Marketing	53.1 %	84.4 %	100.0 %	59.4 %
Customer Service	83.3 %	91.7 %	95.8 %	79.2 %
Operations	62.5 %	70.8 %	95.8 %	77.1 %
International Average	Congruence	Openness	Acceptance	Reliability
	69%	69%	76%	79%

Section Three – Values That Build Trust

Section Two of this report looked at the Trust Building Behaviors, and this section measures the Values that must be present to drive the trust building behaviors. There are two values that need to be present for each of the four **Elements of Trust**.

The eight values are:

Congruence

- **Straightforwardness:** People are clear about what is expected of them
- **Honesty:** Having high standards of honesty in everything we do

Openness

- **Receptivity:** Giving new ideas and methods a fair hearing
- **Disclosure:** Communicating openly one's own ideas and opinions

Acceptance

- **Respect:** People are valued for who they are
- **Recognition:** People get the recognition they deserve

Reliability

- **Seeks Excellence:** Striving to do our best in everything we do
- **Keeps Commitments:** People follow through on their responsibilities

In the questionnaire employees are asked two questions about each of these values:

- How important is this to you personally?
- How well does your organization operate by this value?

Employees do not see the Elements of Trust or the name of the value, just the description.

Reading the Graph: Each of the eight values shows the average score on the first bar (on a scale of 1 to 10) of how important these values are to your employees. The second bar represents the average score for employees' perceptions of the organization's performance on each value. The column on the right shows the number of respondents who completed these questions. The **Trust Values Gap Score** in the box at the top of the page shows the sum of all of the gaps.

Interpretation: The difference between "personal importance" and "organizational performance" can have a significant impact on employee engagement and commitment. If employees indicate that these values are "important" to "very important" to them, and then rate the "organization's performance" significantly lower, they are saying is: "This is important to me but my organization doesn't operate this way."

Key Questions:

- Which values are most important to our employees?
- What do we need to do to improve our organization's performance in these values?

Section 3 - Values That Build Trust

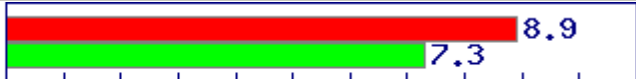
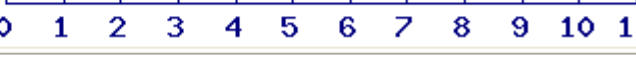
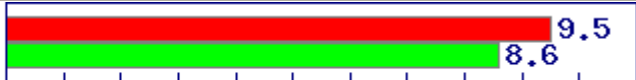
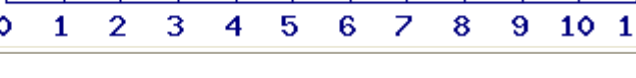
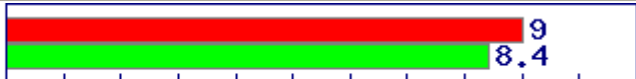
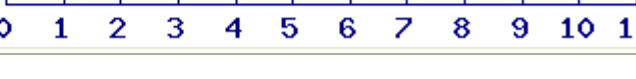
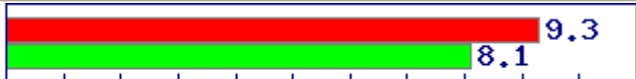
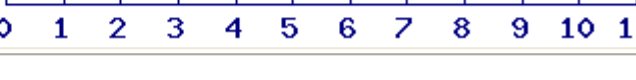
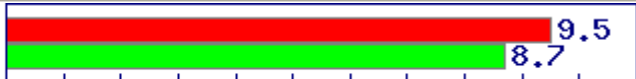
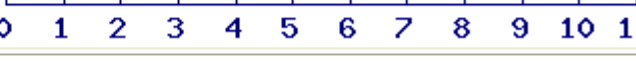
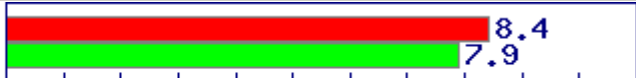
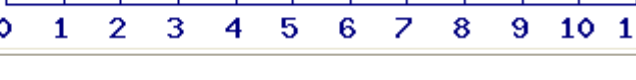
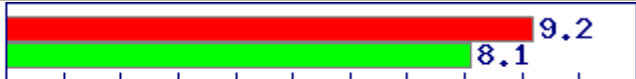
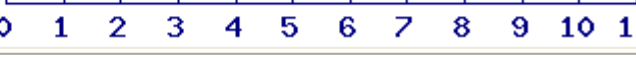
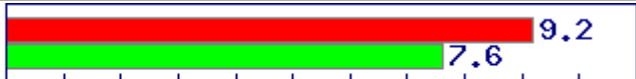
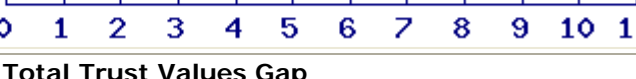
The gap between Employee Expectation and the degree to which the Organization operates by these Values

Company ABC

Organization-wide Report

Your Trust Values Gap Score is 8.4

The graphs below show the Personal Importance and Perceptions of Work Performance for each of the eight values.

	Gap	Int'l Avg
Straightforwardness		
Personal Importance  8.9 Work Performance  7.3 0 1 2 3 4 5 6 7 8 9 10 11	1.6	1.9
Honesty		
Personal Importance  9.5 Work Performance  8.6 0 1 2 3 4 5 6 7 8 9 10 11	0.9	1.6
Receptivity		
Personal Importance  9 Work Performance  8.4 0 1 2 3 4 5 6 7 8 9 10 11	0.6	1.5
Disclosure		
Personal Importance  9.3 Work Performance  8.1 0 1 2 3 4 5 6 7 8 9 10 11	1.2	1.6
Respect		
Personal Importance  9.5 Work Performance  8.7 0 1 2 3 4 5 6 7 8 9 10 11	0.8	1.5
Recognition		
Personal Importance  8.4 Work Performance  7.9 0 1 2 3 4 5 6 7 8 9 10 11	0.5	2.6
Seeks Excellence		
Personal Importance  9.2 Work Performance  8.1 0 1 2 3 4 5 6 7 8 9 10 11	1.1	1.6
Keeps Commitments		
Personal Importance  9.2 Work Performance  7.6 0 1 2 3 4 5 6 7 8 9 10 11	1.6	2.0
Total Trust Values Gap	8.4	14.2

Section Three – Values That Build Trust

Trust Values Gap Analysis Organization Wide

Reading the Report:

This report shows a summary of the **Trust Values Gap** for each group identified for reporting purposes. The *Total Importance* shows the sum of the average level of *Personal Importance* to all employees in each group, and the *Total Performance* is the sum of the average scores for *Work Performance* in each group. The difference between *Total Importance* and *Total Performance* is the *Trust Values Gap* score for that group. The table shows the *Trust Values Gap* score for each group within the organization compared to the organization as a whole and the International Average. The average score for the whole organization is shown at the top of the table.

Section 3 - Values That Build Trust Summary

The gap between Employee Expectation and the degree to which the Organization operates by these Values

Company ABC
Organization-wide Report
July 2005

	Total Importance	Total Performance	Trust Values Gap
Overall	75.1	66.4	8.8
Group Breakdown			
Group	Total Importance	Total Performance	Trust Values Gap
Accounting	75.5	61.7	13.8
Sales and Marketing	74.3	73.0	1.3
Customer Service	74.5	72.7	1.8
Operations	76.7	64.3	12.3
	Total Importance	Total Performance	Trust Values Gap
International Average	74.9	60.7	14.2

Section Four - The Group Alignment Report

This report is measuring two things:

Clarity - how clear each individual believes their work group is on the *purpose, values, vision, goals, procedures* and *roles*.

Approval - to what degree each employee *approves* of the *purpose, values, vision, goals, procedures* and *roles*.

Clarity

It is important to understand the difference here between what we are measuring on *clarity* and *approval*. With *clarity*, we are measuring each employee's perception of how clear they believe their work group is, not how clear the individual is. When people are asked how clear they are, some individuals may not want to admit not being clear. By asking whether they perceive the group to be clear, we get a more accurate picture of clarity.

It is also possible that an individual, the team leader for example, may be very clear on the vision themselves, but believe that the team is very unclear about that vision.

Approval

With *approval*, we are measuring the individual's personal approval. So it is possible to have a *smiling yellow face* in a *very unclear* position on the graph. This would tend to indicate that this person is clear about that item themselves, and approves of it, but believes that the team is very unclear.

The percentages for *Team Clarity* and *Team Approval* represent the raw scores from the questions asked compared to the maximum possible score.

- A score of 70% for Team Clarity is saying that the total aggregate score for the team is 70% of what is possible.
- There is no way of looking at the report and calculating this percentage.
- That is also true of the approval scores... a person does not have to totally approve of each question to get a smiling face, so you can have all smiling faces and a score of less than 100%.

The main benefit of the **Group Alignment Report** is that you can see at a glance in which of these key areas you need to focus on increasing clarity, and where there is a need for more approval.

Key Questions:

- On which items is our group most in alignment?
- How well do we perform in these values?

Section 4 - Group Alignment Report

The Degree to which Group Members are in Alignment
 Company ABC
 Organization-wide Report
 July 2005

	Very Unclear		Moderately Unclear		Moderately Clear		Very Clear	Group Clarity	Group Approval	Int'l Clarity	Int'l Approval
Purpose	2		1 1 1	3 2	4 5	8 3	24 2	79.8 %	83.6 %	88.0 %	89.0 %
Values	1 2	1 1	1 1	2 9	6 9	8 1	14	67.9 %	77.4 %	78.0 %	86.0 %
Vision	1 1	3	1 1	1 6 3	4 12 1	8 2 1	9 2	67.3 %	67.6 %	71.0 %	80.0 %
Goals		1	1 2	3 3	10 4	10 5	17	76.8 %	85.4 %	80.0 %	85.0 %
Procedures	1		1 2	1 4 4	1 11 1	6 6 2	12 3 1	74.7 %	65.2 %	78.0 %	69.0 %
Roles	1	2	1 1	3 3	1 11 2	2 3 3	17 3 3	76.8 %	61.6 %	84.0 %	69.0 %

Position = Clarity

Countenance = Approval

Section Four - The Group Alignment Report

Group Alignment Comparison Organization Wide

Reading the Report:

This report shows a summary of the **Group Alignment** – the degree to which employees in each group are aligned with the organization’s *Purpose, Values, Vision, Goals, Procedures* and *Roles*. The table shows the level of *Clarity* and *Approval* for each group within the organization compared to the organization as a whole, and the International Average. The average score for the whole organization is shown at the top of the table, with each group identified for reporting purposes listed below.

Section 4 - Group Alignment Summary

The Degree to which Team Members are in Alignment
 Company ABC
 Organization-wide Report
 July 2005

	Purpose		Values		Vision		Goals		Procedures		Roles	
	Clarity	Approval	Clarity	Approval	Clarity	Approval	Clarity	Approval	Clarity	Approval	Clarity	Approval
Overall	82.7 %	82.7 %	73.1 %	89.1 %	61.5 %	75.6 %	70.5 %	78.8 %	63.5 %	67.3 %	78.8 %	68.6 %
Group Breakdown												
Group	Purpose		Values		Vision		Goals		Procedures		Roles	
Accounting	87.5 %	75.0 %	75.0 %	91.7 %	58.3 %	66.7 %	58.3 %	66.7 %	50.0 %	62.5 %	62.5 %	66.7 %
Sales and Marketing	75.0 %	83.3 %	75.0 %	87.5 %	58.3 %	75.0 %	75.0 %	70.8 %	66.7 %	79.2 %	87.5 %	79.2 %
Customer Service	80.6 %	94.4 %	88.9 %	97.2 %	75.0 %	86.1 %	83.3 %	97.2 %	75.0 %	80.6 %	88.9 %	77.8 %
Operations	88.9 %	88.9 %	80.6 %	94.4 %	55.6 %	75.0 %	61.1 %	88.9 %	61.1 %	66.7 %	83.3 %	72.2 %
International Average	Purpose		Values		Vision		Goals		Procedures		Roles	
	88%	89%	78%	86%	71%	80%	80%	85%	78%	69%	84%	69%

The Question Statistics Report

This report shows the distribution of answers for each question with both the numbers of employees at each point on the scale, and the percentage of the whole group that number represents.

The questions are listed on this report by item, making it easier to respond to questions others have about what is actually being measured. It also shows whether there is any significant difference in the spread of answers.

This report is provided for the organization as a whole, not for individual workgroups. Employees have been advised that their responses are confidential, and for smaller work groups it can become obvious that one employee is answering the questions differently to the rest of the group. This can lead to unnecessary speculation as to who this might be.

Strategic Alignment Survey
Company ABC
Question Response Statistics
16 Completed Responses

ID #	Res #	Pct	Question Text		Options
			Count	Percentage	
1	16	100%	1. Do people in this group have adequate knowledge of what other team members are doing?		
			0	0.0%	Never
			4	25.0%	Seldom
			5	31.2%	Sometimes
			5	31.2%	Usually
			1	6.2%	Always
			1	6.2%	No Response
2	16	100%	2. Is there gossip among individuals within the group?		
			3	18.8%	Never
			5	31.2%	Seldom
			4	25.0%	Sometimes
			2	12.5%	Usually
			1	6.2%	Always
			1	6.2%	No Response
3	16	100%	3. Overall, do people in the group respect each other's contribution?		
			0	0.0%	Never
			0	0.0%	Seldom
			0	0.0%	Sometimes
			9	56.2%	Usually
			6	37.5%	Always
			1	6.2%	No Response
4	16	100%	4. Can individuals within the group count on others to give support when they need it?		
			0	0.0%	Never
			0	0.0%	Seldom
			7	43.8%	Sometimes
			7	43.8%	Usually
			1	6.2%	Always
			1	6.2%	No Response

Comments Report

This report lists the literal comments employees have provided for each of the 58 questions in the survey. This report is not for general distribution, and typically is provided to members of the senior team to better understand the issues that employees have raised in response to the questions.

Although the comments report is available for each group in the organization, it is not recommended that it be produced for groups of less than 20 people, or where comments can easily be attributed to a particular individual. It is vital that confidentiality is maintained.

Comments Report

Company ABC
Organization-wide Report
July 2005

1. Do people in this group have adequate knowledge of what other team members are doing?

- We have too little communication among ourselves to know
- It just keeps changing and is hard to keep up with
- We are in the beginning stages of development and have not had all the information needed to proceed with the process up until the last week in February.
- The conference calls are helpful in this regard
- The monthly conference calls will definitely help us stay current with each other.
- We have not really started communicating at this level as yet.
- If "the job" is facilitation of an event, I think the knowledge and skill level of Associates varies widely.
- Would love to have more success stories - the newsletter and conference calls are helping...

2. Is there gossip among individuals within the group?

- I am not aware of any but I am sure it is not never
- We all are individuals with different ideas and reasons for and how to use this material.
- This won't really happen until we all get together and create this type dialogue.
- Finding time is a problem
- There has been some discussion about members who were not present.

3. Overall, do people in the group respect each other's contribution?

- People are very open and accepting in my experiences thus far.
- However, I sometime find it amusing that even with all the emotional intelligence training we have experienced we still find it easy to misinterpret, misread or otherwise misunderstand one another's needs and/or motivation and become impatient with each others.
- We are excellent at this!
- What a great group of people overall.