Organizational Assessment—Part 2

by Dennis Hooper, copyright © 2005, published in the *Houston Home Journal* on Tuesday, April 26, 2005

Last week's column described initial steps in evaluating the health of an existing organization. If you would like a copy of that column, call me at (478)-988-0237 or send an e-mail to dhooper2@juno.com.

To review those steps and to identify the remainder of the process, here's a description of an actual assessment that my colleague and I recently completed. (Sometimes I work with a partner; sometimes I work alone.)

Tom and I met with Mary and Stan (not their real names) to learn about their interest in evaluating XYZ Company (also a disguised name).

We helped Mary and Stan decide who among the XYZ employees Tom and I should interview. We shared with them some criteria that previous leaders have found helpful in making their selections.

As usual, the interview day was exhausting, with the XYZ employees providing a deluge of information! At the end of the interviews, we provided a quick briefing to Stan and Mary, letting them know how the conversations went and firming up the timing of the next steps.

Preparing the summary report is always a daunting challenge! We sort the interview information to determine what is currently working in support of the organization's objectives and what is hindering progress. We look for common themes as well as "golden nuggets" of unique value.

Tom and I always work to provide a balanced picture. We acknowledge existing strengths of the organization, because these form the foundation for future improvements. We also name the limitations, as they provide the opportunities for new action and they describe concerns identified by the employees.

Tom and I typically provide a written report to the organization's leaders within ten working days. When possible, we prefer an in-person meeting to address questions and provide encouragement. With Stan and Mary, it wound up being a phone call. We helped them think through their plans for how they will followup with the organization in using this evaluation.

We provided the same report to the interviewed XYZ employees just a few days after briefing Mary and Stan. We had selected a date and time when Stan and Mary, Tom and I, and all the employees who participated could attend. We always prefer to do this in person, so that we can test the accuracy of the report from the body language and tone of voice of the participants.

Mary and Stan kicked off the meeting, reviewing why they had initiated this intervention—what they hoped to accomplish by putting the organization under a microscope. Tom and I described how we generated and formatted the report.

We give the participants time to read the summary. Tension is usually high, as everyone is wondering if the news is bad. We allow the room to be quiet so folks can read without distraction, but an occasional humorous comment sneaks out. As folks skim the report, the mood in the room begins to relax.

Mary and Stan shared their thoughts about what will happen next with this information. By now, the participants had high energy to identify and make improvements. Their involvement had enrolled the participants to expect and even lead change efforts!

Stan and Mary continued to use Tom and me to identify opportunities and support their implementation, capitalizing on the trust we had built with the employees.

Assessments are exciting opportunities. People are stimulated to think in new ways about "what could be" for their organization!

The XYZ Company increased reliability, customer and employee satisfaction, and profits. Could your organization benefit in a similar way?