

# Organizational Assessment—Part 1

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Sometimes a leader wants an independent assessment of the health of his or her organization.

Perhaps the organization has hit a plateau, with no significant growth in recent years. Maybe the organization has grown rapidly, and the leader wants to make an evaluation of whether it is appropriate to slow down for awhile and regroup. Or maybe the organization has performed poorly lately, and the leader wants to learn why.

You visit your doctor once a year for a physical exam. This is the same thing for organizations!

The assessment process usually begins with dialogue about the purpose of the evaluation and the method of inquiry. When I conduct the assessment, I ask questions such as:

- Why are you considering doing an assessment?
- What do you want to learn about the organization?
- What questions might uncover the information you desire?
- How and when could interviews with employees be conducted?

Usually, it is desirable to seek information from a cross-section of employees. I usually ask the leadership team to consider what criteria they'd like to use in selecting participants. For example, I often recommend that we interview individuals who:

- tell the truth about what they believe
- don't change their story based on who they talk to
- can speak firmly and honestly to those in power positions
- can support the company position firmly and honestly to their peers and direct reports
- have a track record of service to internal and external customers
- have a track record of working to improve the organization, not just complain about it

A realistic expectation is to do 7-10 one-hour interviews in a day, usually on-site. I suggest:

- two or three key leaders
- other individuals representing a mix of demographics, lengths of service, skills, etc.

I help the leaders develop a plan for inviting the selected individuals to participate in the interviews. Usually, one of the leaders and I conduct a meeting to share the following information:

- why and how the assessment will be done
- why these individuals were selected
- how they are to interact with others in the organization (honest dialogue is encouraged)
- why honesty of response is desired in the interviews
- why individual responses will not be identified, unless a person specifically requests it

I usually finalize the interview questions with the organization's leaders before the assessment day, so there are no surprises, for me or for the organization.

On the day of the interviews, I like to have all the participants meet with me for lunch. I ask an organizational leader to be present for 10-15 minutes to learn how the interviews are going and to answer questions from the employees.

When the leader leaves, I create a safe space for open dialogue. We talk about the process, how the individual's responses will be aggregated in the report, how the report will be shared back with the leaders and with the interviewees, what will happen next, etc.

Before I leave the site at the end of the day, I provide a quick debrief to the organization's leaders, letting them know how the day went and whether there are any major "watchouts." I also clarify the anticipated timing for the subsequent steps.

Please join me next week to learn what happens in the days and weeks that follow.