



**culturesnapshot** *for M&A*

# **Sample Integration Report**

**Custom Selection of Culture Patterns**

**May 2009**

The **Culture Snapshot™** has been provided by Culture-Strategy Fit Inc.

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This document is a sample of a **Culture Snapshot™** report.  
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# TABLE OF CONTENTS

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Introduction..... 1

Key Findings..... 3

Culture Scorecard..... 7

Optional Questions..... 11

Interpretation Guidelines..... 14

Survey Results..... 16

Appendix A: Optional Questions & Item Statements..... Not included

# INTRODUCTION

111 Organization A and 179 Organization B employees completed the Culture Snapshot™ for Mergers and Acquisitions in May 2009. This is an 83% and 91% participation rate respectively which is exceptional.

The purpose of the survey is to identify areas of synergy and tension between the cultures of Organization A and Organization B. The results will be used as input to the development of integration plans for the combining of the two organizations.

The Culture Snapshot™ for Mergers and Acquisitions is a web-based survey that includes three optional, open-ended questions. The analytic model below was developed in collaboration with 30 leaders from both organizations and includes culture patterns that test areas that most often create tensions in mergers. [Note to reader: This model lines up with an earlier model developed to assess the culture of one of the organizations to deliver its strategy. The model was customize to add in more of the culture factors which create tensions during mergers and acquisitions].

## Organizational Culture Patterns

Agility	Direction	Engagement	Execution	Innovation
Adaptability	Future Focus	Empowerment	Planning Discipline	Idea Sharing
Ambiguity	Strategic Thinking	Identity	Problem Solving	
Expert Decision-Making		Involvement	Process Discipline	
Flexibility		Learning & Development		
Resilience				
Speed				
Performance Orientation	Risk Management	Teamwork & Collaboration	Trust	
Accountability	Problem Management	Collaboration	Authenticity	
Goal Alignment	Sustainability	Consultation	Fairness & Equity	
Managing Performance		Social Dynamics	Openness	
Results Focus		Responsiveness	Trust	

**LEGEND**

Culture Dimension

Culture Pattern

## Survey Participation

Role	Organization A # Complete	%	Organization B # Complete	%
Program Managers	9	8%	33	18%
Analysts	49	44%	94	53%
Administration	12	11%	12	7%
Directors	17	15%	23	13%
Project Managers	24	22%	17	9%
Total	111	100%	179	100%

Note 1: Analysts comprise 44% and 53% of the survey participants in Organization A and Organization B respectively. As a result, the responses of these groups will have a significant effect on the overall survey results.

## KEY FINDINGS

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***Client-Focused & Responsive***  
***Performance & Results-Focused***  
***Teamwork & Camaraderie***

These words describe the cultures of both Organization A and Organization B. It also highlights the finding that there are a lot of synergies and only two areas of potential tension between the two organizations. There are, however, a number of challenges that both organizations are dealing with. From this perspective, integration provides a unique opportunity to strengthen both organizations and position the combined entity for the future.

### Synergies

Synergies are the elements of culture in one or both organizations that support the transition to a merged organization. There are a number of these in Organization A and Organization B however the main ones are:

1. **Client-focused and responsive** - Both organizations pride themselves on being responsive to the needs of their clients in the business and are committed to delivering value.
2. **Performance and results-oriented** – Their focus on clients is the foundation of their focus on results and performance which includes delivering solutions that meet or exceed their clients' requirements.
3. **Team-oriented** – Both organizations are also very team-oriented with strong relationships and camaraderie among team members. This heavily influences the way that work gets done including the approach to the design, development and delivery of programs.
4. **Structurally aligned** – The structures of Organization A and Organization B are also aligned as both organizations seek to optimize the effectiveness of the team approach in delivering solutions to customers by organizing them by market segments or lines of business. This has allowed team members to develop strong relationships with business leaders and subject matter experts contributing to extensive knowledge of their customer's business and training requirements.

### Potential Tensions

Potential tensions refer to the elements of one or both cultures that may interfere with the integration of Organization A and Organization B. For the most part, the differences between the organizations present opportunities to strengthen the combined entity post integration. There are however two areas that may be a source of tension between them.

1. **Candor, openness and trust** – Organization B staff indicate a significantly higher level of these attributes than is evident in the Organization A results. This is a positive aspect of Organization B's culture however it also creates the expectation and desire for this to continue during and after integration. The challenge is that this is not likely to occur within Organization A especially given the very low scores in some groups including Project Managers.

Unfortunately, there is no quick or easy solution. The most important step is for leaders to acknowledge that there is a problem and come to terms with their role in creating the current situation. This should be quickly followed by acceptance of the responsibility to make the changes required to eventually create a more positive situation in the future.

2. **Differences in role flexibility** – It appears that Program Manager and Project Manager roles are clearly separated in Organization A whereas some market segments in Organization B have combined roles. This results in some Organization B staff having quite a bit of flexibility with respect to the product that they are delivering including the ability to make changes to meet the needs of their specific clients. A change that results in a loss or significant drop in flexibility and/or role scope may not be welcomed in these groups.

## Opportunities

Organization A and Organization B share a lot of practices and behavior norms that will ease the integration of the two organizations. They also present a number of opportunities that have the potential to make the whole stronger than the sum of its parts. The most significant are:

1. **Strengthen collaborative practices** – While both organizations are team-oriented, they tend to operate in silos that mimic market segments or lines of business. This contributes to sub-optimal idea and knowledge sharing, duplication of work and failure to take full advantage of operational synergies. Among the practices that should be examined are information and knowledge sharing across groups (includes sharing ideas and best practices), consultation, resource management, and internal responsiveness to requests for assistance.  
For example, both organizations use collaborative practices such as the Design Advisory Teams (DAT) in Organization B that bring designers/developers and facilitators together when new programs are required or existing programs need to be updated. This is an area of synergy that should be further leveraged to strengthen collaboration across teams, market segments and/or lines of business.
2. **Be ‘intelligently’ responsive** – Both organizations do whatever it takes to meet the needs of their clients in the business. The opportunity is to manage this so that there is minimal disruption and stress resulting from the reprioritization of work. This means paying special attention to areas that are highly reactive and being disciplined in resource management practices.
3. **Increase consistency and transparency in Human Resource practices** – Employees in both organizations indicate that there is favoritism in determining advancement and development opportunities. This is based at least to some extent in the belief that there is a lack of knowledge of and respect for the talents of all team members.
4. **Balance direction with higher levels of empowerment** – Both organizations provide clear direction and are very goal-oriented. This is also evident in the style of many managers who are directive and, in some cases, go to the extreme and micro-manage employees. On the other hand, there are a number of managers who empower their staff to make decisions. The opportunity is to strengthen the balance of direction and empowerment provided by all managers. This includes recognizing the value of the experts in the organization and the advantages to be gained by deferring complex decisions to the people who have the most knowledge.

This is intended as input to the development of integration plans. It is important that both parties explore these opportunities at a detailed level including discussing the implications for the combined organization.

## Recommendations

### 1. Strengthening ‘truth-telling’ or candor in Organization A

*“A culture of candor, established and reinforced by leaders who value and model it in their own behaviors, can be a source of competitive advantage for organizations. It ensures that good news travels fast and bad news travels faster, allowing mistakes to be recognized quickly and fixed promptly; people own their actions and own up to their errors so that they can learn from them; people know where they stand, know what’s expected of them, and know what it takes to get promoted and fired.”*

Jeffrey Gandz, Professor & Managing Director  
Richard Ivey School of Business

#### Approach:

Increasing the level of candor relies heavily on the skills and commitment of leaders. Our research has shown that leader behaviors have a powerful amplifying effect on organizational behavior norms and practices. Anyone who has worked with a very good leader or a really dysfunctional one can clearly recall the effect that this individual had on the culture of the organization. This is why it is extremely important that senior managers are aware of the ways that their behaviors are influencing others and their organization’s culture. The good news is that leader behaviors can be used in an intentional manner to accelerate culture change and strengthen alignment to strategy. This is not to suggest that changing behavior is easy but it is one of the most powerful tools that leaders have available to them.

For this reason, we recommend that Organization A begins to address this by focusing on capability development and accountability for demonstrating candor at the senior management level. This needs to be authentic so it is important that they are the architects of any changes or initiatives that are developed and take personal responsibility for implementing this in their organizations.

#1. Clearly articulate and describe the behaviors that leaders need to demonstrate to encourage candor. Include stories that provide powerful examples of candor in action. Some suggestions that can be used to help get started include:

- Personally model candor in both giving and receiving feedback.
- Be skeptical with respect to information that reaches you through formal channels, especially if it is always good. If bad news never reaches you, it is probably because you are sending subtle signals that suggest you don’t want to hear about it.
- Put the elephant on the table – don’t be afraid to open up conversations about the unspoken issues that everyone is thinking about but no one is talking openly about.
- Make it clear that you want straight, unfiltered and unvarnished feedback and that no one should censor what is being said.
- Make it as clear as you can that fear and intimidation is not acceptable and that managers using these behaviors are not welcome at Organization A.

#2. Provide training or coaching to individuals or teams that need to learn how to have candid conversations especially when it deals with performance or behaviors.

#3. Make candor a requirement at all leadership team meetings and leader-to-leader interactions.

- Include a candor check periodically to make it explicit that this is the expected way of working at Organization A.
- Avoid 'gotchas' and emphasize that this is new behavior and mistakes are expected. The important thing is to learn.

#4. Provide leaders with feedback on their skills in being candid.

- Introduce a simple measurement tool 3 to 6 months after implementation. Use this to provide leaders with personal feedback from their peers.

#5. Expand the approach into the functions and divisions.

- Allow enough time for senior leaders to build capability and be effective before rolling this out into lower levels. In some cases, leaders may find themselves confusing abrasiveness and finger-pointing with candor. It is important that they learn the difference and avoid damaging the many positive aspects of Organization A's culture.

## **2. Clarify design, development and delivery roles and related processes**

Organization A and Organization B Program Managers and Project Managers are used to being consulted and involved in changes that affect them. Given that the combining of the two organizations is likely to be accompanied by structural and process changes, there is a powerful opportunity to bring people from both organizations together to share best practices. This should include defining roles, responsibilities and collaborative practices that extend across market segments and lines of business. This has the additional value of generating solutions to strengthen collaborative practices and increase efficiencies thereby strengthening execution.

## **Next Steps**

### **1. Identify the implications of these findings for integration plans**

Exploring the survey results and findings in more detail provides a powerful opportunity for members of both organizations to develop a deeper understanding of each other (and themselves) as well as identify the implications for integration plans. To the extent possible, we recommend an inclusive approach that brings as many people as possible from both organizations together to conduct this exercise. This involves asking the question 'why' things are done the way they are and what would happen if...? A format that is very effective for these types of conversations is the World Café ([www.worldcafe.com](http://www.worldcafe.com)).

### **2. Share the survey findings and next steps with remaining Organization A and Organization B employees**

Given that it is unlikely that all employees will have the opportunity to participate in step one, it is important to share the survey results and next steps as soon as possible. This should be done in a manner that encourages discussion that is appreciative in nature.

### **3. Plan to monitor progress and measure results.**

One of the most effective methods we have used for monitoring progress is to convene a session (preferably face-to-face) of leaders and, if possible, a cross-section of employees. This session is used to share examples of changes that have occurred as a result of integration.

This session is also used to share lessons learned and best practices as well as identify other opportunities and brainstorm ideas and solutions to problems that have been encountered.










Eventually, we recommend conducting another Culture Snapshot to measure the change that has occurred and identify the next course of action to strengthen the culture of the combined organization.

## CULTURE SCORECARD

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The intent of the Culture Scorecard is to highlight the areas of synergy (green), tension or opportunity (red) and areas to monitor (gold). This is based on analysis of the survey results plus the responses to the optional questions taking into consideration a number of factors including the dynamics between the culture dimensions. It is not driven exclusively by average scores on survey items.

Table 1.0 Culture Scorecard

Culture Dimension	Scorecard
<b>Direction</b>	
<b>Agility</b>	
<b>Teamwork &amp; Collaboration</b>	
<b>Execution</b>	
<b>Risk Management</b>	
<b>Engagement</b>	
<b>Innovation</b>	
<b>Performance Orientation</b>	
<b>Trust</b>	

### Key Synergies

#### **Direction**

##### **Both organizations share a commitment to delivering value to their clients**

Organization A and Organization B employees are confident in the vision and direction that is laid out by their organizations. This includes the belief that their organizations are committed to delivering value to their clients in the business. There is very strong alignment in this dimension that suggests that this has the potential to be leveraged during integration.

#### **Risk Management**

##### **Both organizations try to be proactive and consider the long-term implications of decisions**

Both organizations make a serious effort to take a proactive approach to problem management by preparing for the possibility that problems may occur and addressing potential problems before they can develop into major challenges. This is important to being able to respond effectively to the needs of the business (see Agility). However, some roles such as Organization A's Administration and Organization B's Program Managers indicate that there is room to improve. These roles also report relatively low scores on the consideration of long-term

implications when making decisions. This suggests that they are in reactive work environments and are experiencing the challenges that are part of them (see the earlier Agility discussion).

## Performance Orientation

### **Both organizations are performance and results-oriented, however blaming is an issue in some groups**

Organization A and Organization B are performance-oriented organizations that employ practices designed to ensure that results are achieved. This includes the use of performance management and goal alignment practices ensure that team members know what is expected of them and are provided the feedback that they need to improve their performance (note: this does not include Organization A Administration which reports that 50% of employees do not receive adequate feedback on their performance) . This extends to understanding how their department assists other departments to achieve their goals. There is also a strong sense of urgency to achieve results and a belief that others can be depended on to deliver on their commitments.

There are however concerns that blaming or finger-pointing is being experienced by some team members particularly within Organization B Program Manager and Organization A's Administration and Project Managers. This is a concern as blaming can quickly erode trust and get in the way of collaboration thereby negatively affecting performance.

## Tension/Opportunity Areas

### Teamwork and Collaboration

#### **Camaraderie and teamwork is highly valued by members of both organizations**

*I would hate to lose the "team" aspect of Organization A. I enjoy they way we are grouped into teams under a central leader. It is very helpful to have a manager that we can reach out to on a day to day basis. It is also helpful to have peers in other markets (Organization A)*

*We have a strong team who support each other and are able to rely on each other when issues arise. I would hate to lose that camaraderie. (Organization B)*

In both organizations, the most frequent response to the question what would you hate to lose as a result of the integration is the camaraderie and teamwork that exists in the teams. It is therefore not surprising that the majority of people in both organizations also report that people treat each other with respect. The notable exception is the Administration role in Organization A where 58% of survey participants indicate otherwise.

There also appear to be challenges in effectively dealing with conflict particularly in the Program Manager roles in both organizations, as well as Administration and Project Manager roles in Organization A.

#### **Collaborative practices need to be strengthened in both organizations**

The survey results as well as the responses to the optional questions indicate that collaboration across groups is an area that can be improved in both organizations. For example, 36% of Organization A and 46% of Organization B employees know what other work is underway in their organizations that may affect them. In Organization A, this is most significant in Administration where a mere 8% of employees entered a positive response. Among Project Managers and Analysts 25% and 33% respectively entered a positive response. In Organization

B, the lowest scoring roles are Administration and Program Managers both reporting a positive response from 36% of participants. However, 64% of Project Managers indicate that they are aware of other work underway that may affect them.

In addition, 34% of Organization A employees believe that decisions are made without thoroughly understanding the positions of different stakeholders indicating weakness in the consultation process. 28% also indicate that they have to follow-up with others to get the assistance that they need suggesting sub-optimal levels of internal responsiveness. This is consistent across all the roles with particularly weak results in Administration.

Internal responsiveness is also an opportunity area in Organization B where 26% of employees indicate that they have to follow-up with others to get the assistance they need. This is of greatest concern in the Program Manager role where 49% of team members indicate they experience difficulties. The results on consultation are somewhat stronger although this is caused by strong scores reported by Managers and Project Managers. The results for the other roles are very similar to those reported by Organization A.

We suspect that the resource challenges noted earlier are playing a role in both organizations. Unfortunately, this is a vicious circle as weakness in collaborative practices is normally accompanied by duplication of effort, lack of best practice sharing, increased reactive work, and time spent solving problems. This increases workload and stress levels further eroding the ability to stop the cycle and begin operating collaboratively.

## Trust

### **There is a lack of candor in Organization A**

32% of Organization A team members indicate that they feel safe to speak openly and 39% believe that it is safe to question decisions. This is most evident in the Administration, Program Manager, and Project Manager roles. This indicates reticence to voice their opinions, ask difficult questions and challenge decisions. This makes it very difficult for leaders to gauge what people are really thinking and feeling, interferes with generative thinking and knowledge sharing beyond the safety of team boundaries and can negatively affect morale and performance.

*Additionally, possessing fear of sr. leaders fosters a negative work environment (Organization A)*

Organization B's results are much stronger particularly among Project Managers where 88% indicate that they feel safe to speak openly and question decisions. This is in contrast with the results of their Organization A peers who report that only 29% feel safe to speak openly and 38% believe it is okay to question decisions. A similar disparity is evident in the results of the Administration role however Program Managers did report lower scores that are closer to those of people in the same role within Organization A.

### **There are perceptions of favoritism in the treatment of people in both organizations**

31% of Organization A and 23% of Organization B's team members indicate that there is favoritism in the treatment of people. This includes 75% of Organization A Administration staff, 44% of Project Managers and 33% of Program Manager staff. Organization B's results are affected by perceptions of favoritism by 27% of Program Manager staff, 24% of Analysts and 24% of Project Managers.

This is at least in part the result of perceived favoritism in progression and advancement opportunities according to 27% of Organization A and 22% of Organization B staff. Responses to the optional questions suggest that perceptions of favoritism in the access to development opportunities may also be a factor in both organizations.

## **Agility**

### **Both organizations are responsive but can also be reactive**

The commitment to adding value to clients is evident in the Agility results. Both Organization A and Organization B are able to move quickly in response to customer needs and unexpected developments. This includes rapidly reprioritizing to adjust to changing circumstances. The challenge is to be able to accomplish this while maintaining a focus on long-term goals and minimizing disruption and stress.

While both organizations appear to be successful at staying focused on goals and objectives (see Performance Orientations), some roles in both organizations, such as Program Managers, indicate that the organization is not only responsive but also reactive. The Project Manager and Administration roles in Organization A also appear to experience a high level of reactivity. Reactive work environments are a common cause of disruption and stress especially in high performance organizations that take a 'no excuses' approach to achieving results.

*We, unfortunately, are directed to many times reaction without being given adequate time to reflect and create reasonable solutions - all driven from the top down...*  
(Organization A)

*Allowing the tail to wag the dog. We tend to be very reactive to company issues as opposed to being proactive. This results in almost everything being a Priority 1 project.*  
(Organization B)

A contributing factor to the stress in these environments is the challenge of effectively managing workload and resource allocation. As priorities are often changing, resource management is particularly challenging and requires a combination of disciplined practices and a flexible workforce.

Reactive and resource challenged environments often are lacking in reflective practices due to workload and time constraints. While there is room to improve, the focus on performance that characterizes both organizations ensures that an effort is made to identify opportunities for improvement including root cause analysis of problems (see Execution). This appears to be more extensive in Organization B where mistakes are treated as an opportunity to learn. This contrasts with Organization A where 67% of Administration and 42% of Project Managers indicate this is not the case.

### **People in more senior positions are relied on to make decisions**

In both organizations, decisions are primarily made by people in more senior positions rather than those with the greatest expertise in an area. This suggests a hierarchical and directive approach that is also evident in the results on Engagement.

The main difference in the Organization A and Organization B results is that Managers and Project Managers in the former organization believe that expertise plays a greater role than their counterparts in Organization A. People in these roles also report feeling more empowered to make decisions than their Organization A counterparts. This combination suggests that there is a higher level of involvement of senior managers in day-to-day decision-making in Organization A. It is however also possible that the stronger results in Organization B Manager and Project Manager roles reflect the belief that the people with the most expertise are also the ones in management positions.

While this may be the case, it is important that this assumption is tested and challenged otherwise experienced and capable people at lower levels may not have the decision-making authority and responsibility that is commensurate with their abilities.

## OPTIONAL QUESTIONS

At the beginning and end of the survey, respondents are provided an opportunity to answer three open-ended questions that ask:

1. What is one thing about the way we currently work together at Organization A/Organization B that you would hate to lose?
2. What is it about the way we currently do things at Organization A/Organization B that has the potential to get in the way of our future success?
3. What is one thing about the way we work together at Organization A/Organization B that we need to do better (start doing) if we are to be successful?

A complete set of the responses to these questions are provided in the separate Organization B and Organization A reports. In this section, we compare the most frequent themes in the responses of employees in both organizations.

### 1. What is one thing about the way we currently work together at Organization A/Organization B that you would hate to lose?

Organization B	%	Organization A	%
1. Teamwork & camaraderie <ul style="list-style-type: none"> <li>○ <i>People are always willing to help each other, and go out of their way to do so. No one guards their turf or has a big ego</i></li> </ul>	25%	1. Teamwork & camaraderie <ul style="list-style-type: none"> <li>○ <i>The level of support I receive from all my colleagues. Anytime I call to ask a question or need assistance everyone is ready to do their part. We truly live the Organization A Brand.</i></li> </ul>	31%
2. Collaboration <ul style="list-style-type: none"> <li>○ <i>We have very open lines of communication between the Project Managers and the Analysts which allows the Analysts to provide feedback about how things are going.</i></li> </ul>	10%	2. Openness <ul style="list-style-type: none"> <li>○ <i>Open communication avenues</i></li> </ul>	12%
3. Approach to training <ul style="list-style-type: none"> <li>○ <i>Having programs developed by a separate design department</i></li> <li>○ <i>Delivery Advisor Teams (DAT) - These teams allow us to adapt to change quickly and gives us the ability to communicate change to the entire footprint thru local representation.</i></li> </ul>	10%	3. Opportunities for personal development <ul style="list-style-type: none"> <li>○ <i>The way my boss is involved in my development. She wants me to go up in the company and it shows</i></li> </ul>	7%

Organization B	%	Organization A	%
<p>4. Ability to deliver solutions</p> <ul style="list-style-type: none"> <li>○ <i>the creative freedom to develop programs that fit the needs of our area</i></li> <li>○ <i>ability to assess line of business needs and implement necessary programs/ability to make change as necessary and not just maintain status quo</i></li> </ul>	7%	<p>4. Ability to deliver solutions</p> <ul style="list-style-type: none"> <li>○ <i>The ability to develop and foster relationships with the different lines of business. The flexibility we have in reaching out to our internal clients to identify and address their needs.</i></li> </ul>	6%
<p>5. Opportunities for personal development</p> <ul style="list-style-type: none"> <li>○ <i>Lots of different development opportunities – training, coaching, conferences etc.</i></li> </ul>	7%		

**2. What is it about the way we currently do things at Organization A/ Organization B that has the potential to get in the way of our future success?**

Organization B	%	Organization A	%
<p>1. Resource challenges</p> <ul style="list-style-type: none"> <li>○ <i>typically scheduled at over 100% capacity. No dedicated project manager overseeing projects - IDs do it all - PM and ADDIE.</i></li> </ul>	9%	<p>1. Insufficient communications</p> <ul style="list-style-type: none"> <li>○ <i>Lack of transparency regarding organizational changes, promotions, and management decisions.</i></li> </ul>	15%
<p>2. Approach to program design, development and delivery</p> <ul style="list-style-type: none"> <li>○ <i>typically scheduled at over 100% capacity. No dedicated project manager overseeing projects - IDs do it all - PM and ADDIE.</i></li> </ul>	7%	<p>2. Resource challenges</p> <ul style="list-style-type: none"> <li>○ <i>The teams are always made up of the same people. We need some fresh ideas.</i></li> <li>○ <i>I think that our resources are stretched thin a lot of the times and not just during conversions. I believe that many of the Organization A employees have a lot on their plates which can effect the goal we are trying to attain.</i></li> </ul>	10%

Organization B	%	Organization A	%
<b>3. Structure</b> <ul style="list-style-type: none"> <li>Organization B is still compartmentalized into the different lines of business so there is no communication or sharing of resources throughout the company.</li> <li>Currently design, development, and implementation is done by the same person. Becoming more structured/giving up this</li> </ul>	6%	<b>3. Structure</b> <ul style="list-style-type: none"> <li>It would more helpful if the rest of Organization A knew more about what GIS does and how the department is interpreted here. It often seems that we are not thought of in the same way as other areas of the organization.</li> <li>We need a clearer definition of roles and responsibilities. The fuzzy lines can cause unnecessary stress and conflict.</li> </ul>	10%
<b>4. Lack of consistency</b> <ul style="list-style-type: none"> <li>Across our departments at Organization B, we have some opportunities for greater synergy which would lead to an improved client experience and greater effectiveness, quality and work efficiencies.</li> </ul>	5%	<b>4. Technology</b> <ul style="list-style-type: none"> <li>Technology and equipment, is the LMS easy for our customers to use, NO, does the IS environment always work, NO, these are just examples</li> </ul>	6%
<b>5. Ability to meet needs of business</b> <ul style="list-style-type: none"> <li>Inability to quickly respond and update materials based on field needs</li> <li>As a team, we constantly struggle with the business to set priorities and for them to listen to our recommendations for what is best and how it is best presented.</li> </ul>	5%	<b>5. Approach to development and progression</b> <ul style="list-style-type: none"> <li>The way we handle personal development - managers pick &amp; choose who should be involved in what, limiting choice for individuals.</li> </ul>	6%

**3. What is one thing about the way we work together at Organization A/Organization B that we need to do better (start doing) if we are to be successful?**

Organization B	%	Organization A	%
<b>1. Communicate</b> <ul style="list-style-type: none"> <li>not just saying that communication is important but UNDERSTANDING it is important and listening to all voices. Making sure that every employee on every level hears the same information and therefore feels valued.</li> </ul>	17%	<b>1. Collaborate</b> <ul style="list-style-type: none"> <li>Lack of communication between departments in regards to procedures that affect both departments helps the business, but not cost effective</li> </ul>	22%
<b>2. Collaborate</b> <ul style="list-style-type: none"> <li>True collaboration (Ask to be equal partners in creating-rather than just asking for opinions and not using other peoples opinions or ideas in the end)</li> <li>More sharing of ideas/best practices across business lines.</li> </ul>	16%	<b>2. Communicate</b> <ul style="list-style-type: none"> <li>The flow of communication needs to be improved. Right now there is no consistency in the communication of information, especially as it relates to the integration. Some are very "in the know" while others know nothing.</li> </ul>	10%

Organization B	%	Organization A	%
3. Modify some approaches <ul style="list-style-type: none"> <li>We need to start asking employees and managers for what needs to be done instead of guessing and forcing programs that may not be needed.</li> </ul>	10%	3. Develop employees <ul style="list-style-type: none"> <li>Stop drawing lines in the sand. If people want to step toward greater responsibility and stretch their talent Organization A should foster that rather than stifling it.</li> </ul>	10%
4. Develop employees <ul style="list-style-type: none"> <li>Encourage development, including the opportunity for attending 'outside' workshops to allow for new ideas, techniques, etc.</li> </ul>	8%	4. Respect and value employees <ul style="list-style-type: none"> <li>We all need to be treated with the same respect, it should not matter what level you are, how you got to Organization A.</li> </ul>	8%
5. Work more effectively with the business <ul style="list-style-type: none"> <li>Clearly communicate our capabilities, capacity, and limitations to the line of business to level set expectations.</li> </ul>	5%		

## INTERPRETATION GUIDELINES

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### Survey Scale

The scale used in the charts and tables in this survey is as follows:

- 1 = strongly disagree
- 2 = disagree
- 3 = neutral
- 4 = agree
- 5 = strongly agree
- NA = not applicable




### Results Charts

Bar charts are used as the main format for presenting the survey results. In general, scores below a 3.00 suggest a potential opportunity area and scores below a 2.50 indicate a strong possibility of an opportunity area. Both are worthy of further investigation. Scores above 4.00 indicate an area of probable strength while scores above 4.50 indicate significant strength. These areas should be examined for their potential as levers to further strengthen change readiness. Scores between a 3.00 and 4.00 are ambiguous as they may indicate a range of responses, a polarization of responses at both ends of the scale or a neutral response.

### Distribution of Response Tables

A Distribution of Responses Table accompanies each results chart. This table indicates the number of people who responded with a specific score. For example, in the following table, the average score for the group was 3.82. Of the 30 people who responded, 1 strongly disagreed, 4 disagreed, 3 were neutral, 12 agreed and 9 strongly agreed.

**Legend**

Items with scores $\geq 4.00$ (Strength)	
Items with scores $> 3.00$ and $< 4.00$ (Monitor)	
Items with scores $\leq 3.00$ (Opportunity)	

Organization: Example  
Date: 2007

Identity	Group	Ave	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
1. This is a great place to work	Total	3.83	1	4	3	12	9	1

This information is particularly important when analyzing scores that are in the mid-range. For example, an average score of 3.00 could mean that everyone responded with a neutral (3) or that half of the people responded with a 2.00 and half with 4.00. If the former is true, then it is likely that the item is not of particular interest or concern to people, however, if the latter is the case then there may be a problem in one or more areas of the organization that requires clarification and attention.

### Scorecard Coding

To assist in identifying synergies and tensions, it can be useful to apply a 'green, gold and red' assessment to each pattern that is examined.

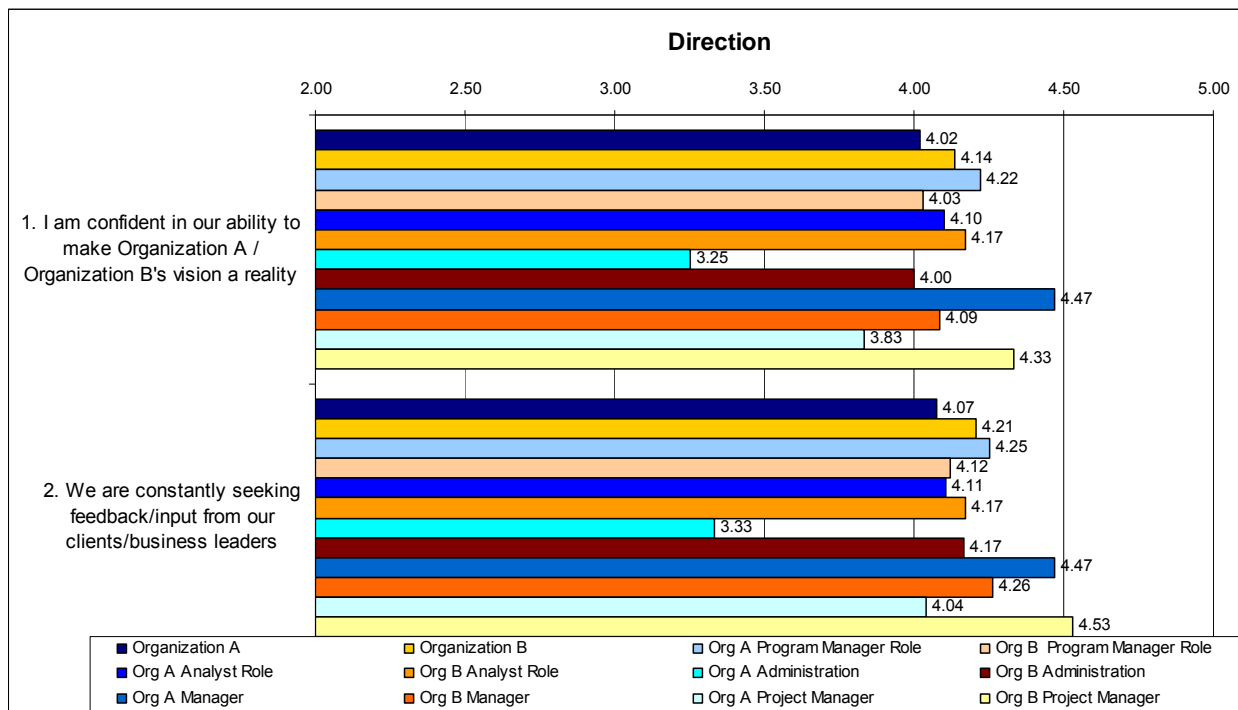
 Synergy/Strength     Monitor     Tension/Opportunity

# SURVEY RESULTS

This section of the report provides the graphs and tables that contain the Organization A and Organization B survey results. The results are intended to be used as a basis for conversations that develop a deeper understanding of the culture of the two organizations and as input to integration plans.

## Direction

*Direction* is the extent that an organization uses practices that help to create a shared vision of the future. It includes the future focus culture pattern.

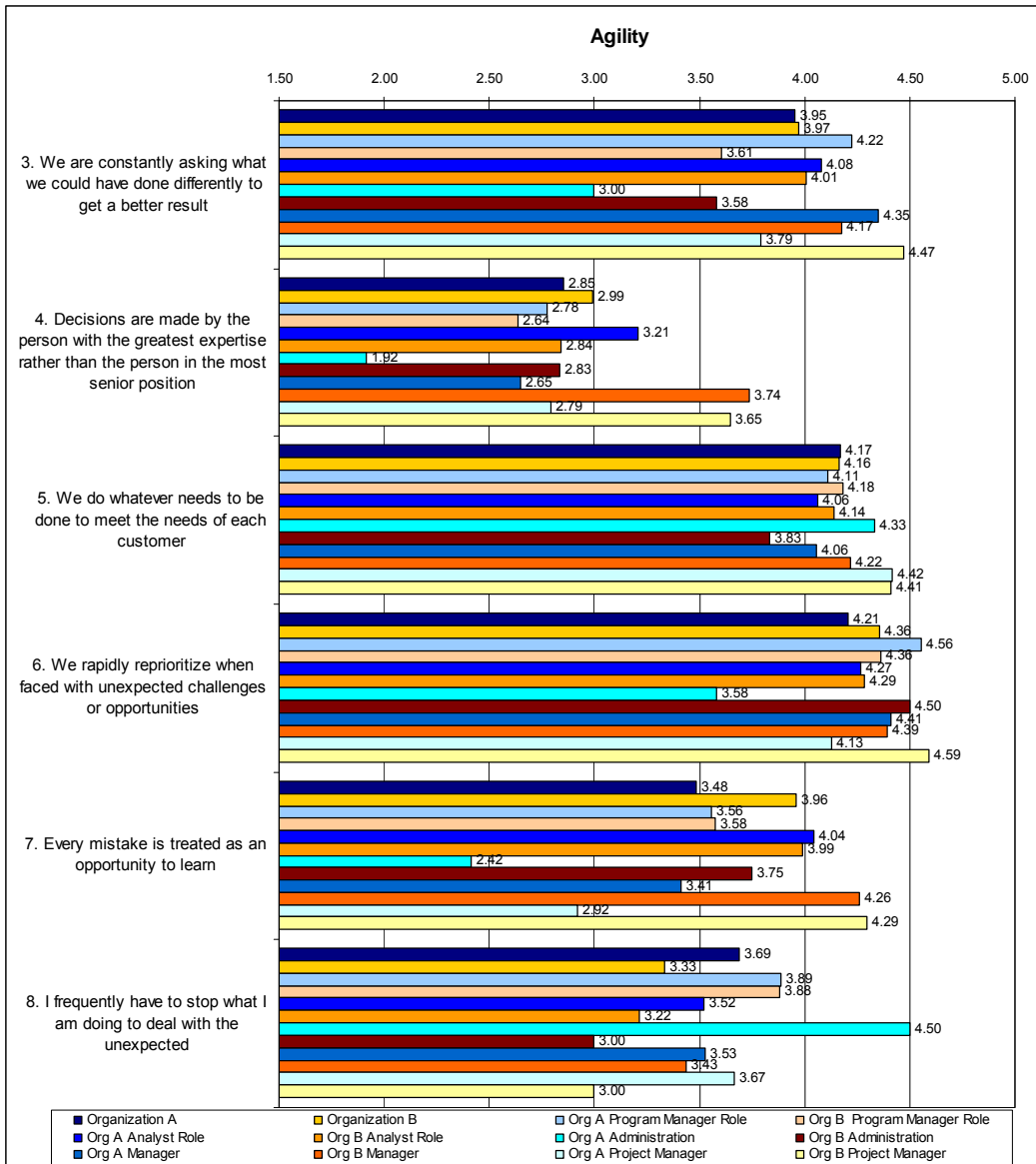


Direction	Group	Ave	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
1. I am confident in our ability to make Organization A / Organization B's vision a reality	Organization A	4.02	0	7	19	50	35	0
	Organization B	4.14	0	5	26	85	60	3
	Org A Program Manager	4.22	0	0	2	3	4	0
	Org B Program Manager	4.03	0	2	4	18	9	0
	Org A Analyst	4.10	0	1	8	25	15	0
	Org B Analyst	4.17	0	0	19	40	35	0
	Org A Administration	3.25	0	3	4	4	1	0
	Org B Administration	4.00	0	2	0	5	4	1
	Org A Manager	4.47	0	0	2	5	10	0
	Org B Mgr	4.09	0	1	2	14	6	0
	Org A Project Manager	3.83	0	3	3	13	5	0
	Org B Project Manager	4.33	0	0	1	8	6	2

Direction	Group	Ave	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
2. We are constantly seeking feedback/input from our clients/business leaders	Organization A	4.07	2	6	15	44	41	3
	Organization B	4.21	1	8	23	68	79	0
	Org A Program Manager	4.25	0	1	0	3	4	1
	Org B Program Manager	4.12	0	3	4	12	14	0
	Org A Analyst	4.11	0	1	8	23	15	2
	Org B Analyst	4.17	0	4	14	38	38	0
	Org A Administration	3.33	1	3	2	3	3	0
	Org B Administration	4.17	1	0	0	6	5	0
	Org A Manager	4.47	0	0	2	5	10	0
	Org B Mgr	4.26	0	1	5	4	13	0
	Org A Project Manager	4.04	1	1	3	10	9	0
	Org B Project Manager	4.53	0	0	0	8	9	0

## Agility

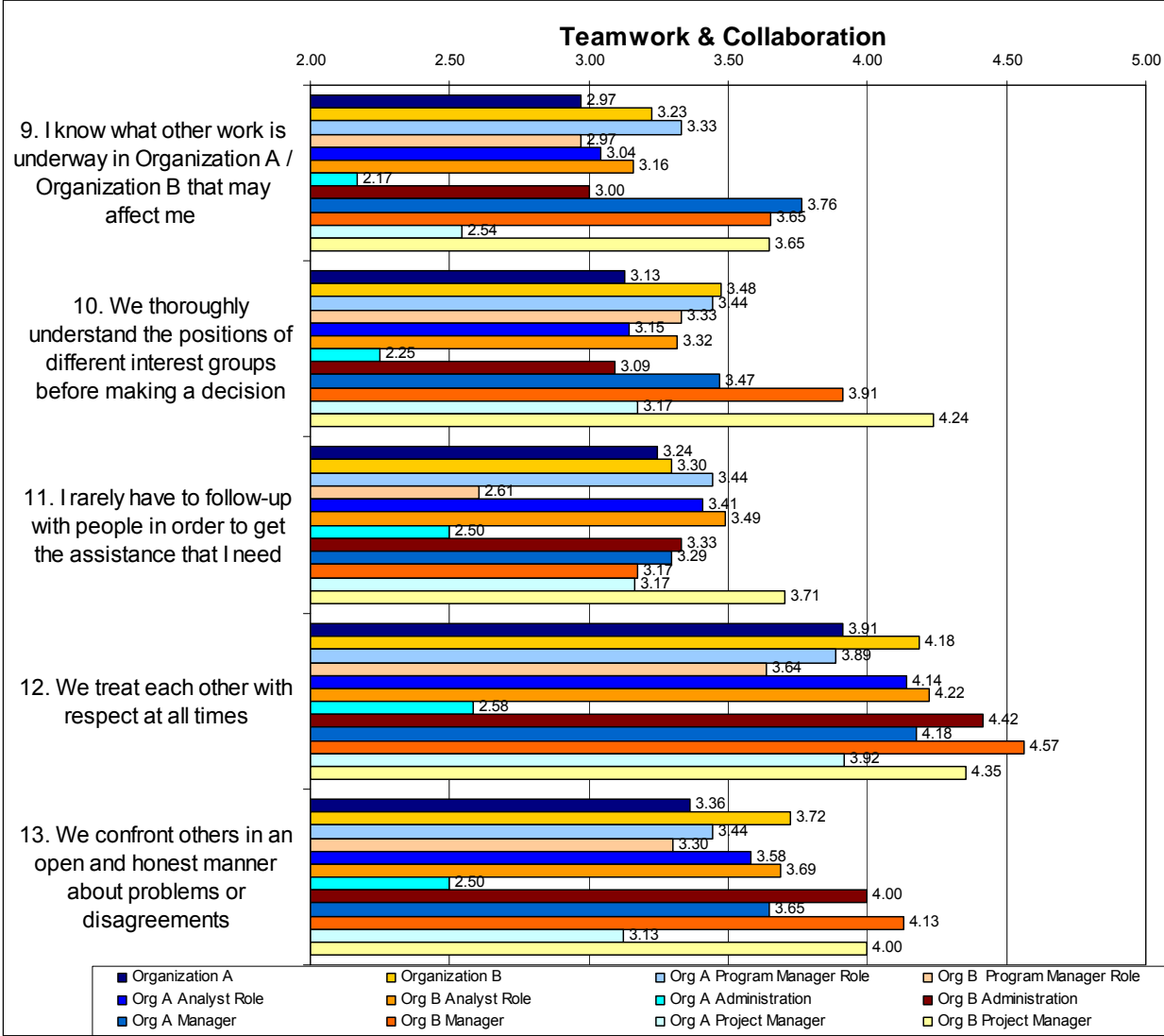
*Agility* is the extent that an organization uses practices that create the ability to effectively take advantage of opportunities and respond to challenges in the internal and external environment. It includes culture patterns that examine flexibility, adaptability, speed and resilience.



Agility	Group	Ave	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A	
3. We are constantly asking what we could have done differently to get a better result	Organization A	3.95	2	8	17	50	34	0	
	Organization B	3.97	1	18	28	70	62	0	
	Org A Program Manager	4.22	0	0	2	3	4	0	
	Org B Program Manager	3.61	0	7	7	11	8	0	
	Org A Analyst	4.08	0	1	7	28	13	0	
	Org B Analyst	4.01	0	6	16	43	29	0	
	Org A Administration	3.00	1	4	3	2	2	0	
	Org B Administration	3.58	1	1	3	4	3	0	
	Org A Manager	4.35	0	0	2	7	8	0	
	Org B Mgr	4.17	0	4	1	5	13	0	
	Org A Project Manager	3.79	1	3	3	10	7	0	
	Org B Project Manager	4.47	0	0	1	7	9	0	
	4. Decisions are made by the person with the greatest expertise rather than the person in the most senior position	Organization A	2.85	17	22	37	28	6	1
		Organization B	2.99	21	44	48	45	20	1
Org A Program Manager		2.78	2	0	5	2	0	0	
Org B Program Manager		2.64	6	12	5	8	2	0	
Org A Analyst		3.21	0	11	20	13	4	1	
Org B Analyst		2.84	11	26	30	19	7	1	
Org A Administration		1.92	7	2	1	1	1	0	
Org B Administration		2.83	3	1	4	3	1	0	
Org A Manager		2.65	2	7	3	5	0	0	
Org B Mgr		3.74	1	2	4	11	5	0	
Org A Project Manager		2.79	6	2	8	7	1	0	
Org B Project Manager		3.65	0	3	5	4	5	0	
5. We do whatever needs to be done to meet the needs of each customer		Organization A	4.17	1	7	13	40	49	1
		Organization B	4.16	1	9	26	67	76	0
	Org A Program Manager	4.11	0	1	0	5	3	0	
	Org B Program Manager	4.18	0	1	8	8	16	0	
	Org A Analyst	4.06	0	3	11	14	20	1	
	Org B Analyst	4.14	0	5	12	42	35	0	
	Org A Administration	4.33	0	0	1	6	5	0	
	Org B Administration	3.83	1	1	1	5	4	0	
	Org A Manager	4.06	1	1	1	7	7	0	
	Org B Mgr	4.22	0	2	2	8	11	0	
	Org A Project Manager	4.42	0	2	0	8	14	0	
	Org B Project Manager	4.41	0	0	3	4	10	0	
	6. We rapidly reprioritize when faced with unexpected challenges or opportunities	Organization A	4.21	2	4	8	52	45	0
		Organization B	4.36	2	7	9	68	93	0
Org A Program Manager		4.56	0	0	1	2	6	0	
Org B Program Manager		4.36	1	1	1	12	18	0	
Org A Analyst		4.27	0	1	3	27	18	0	
Org B Analyst		4.29	1	4	7	37	45	0	
Org A Administration		3.58	1	3	0	4	4	0	
Org B Administration		4.50	0	1	0	3	8	0	
Org A Manager		4.41	0	0	2	6	9	0	
Org B Mgr		4.39	0	1	1	9	12	0	
Org A Project Manager		4.13	1	0	2	13	8	0	
Org B Project Manager		4.59	0	0	0	7	10	0	
7. Every mistake is treated as an opportunity to learn		Organization A	3.48	9	18	15	47	21	1
		Organization B	3.96	6	9	29	77	58	0
	Org A Program Manager	3.56	0	2	1	5	1	0	
	Org B Program Manager	3.58	2	4	7	13	7	0	
	Org A Analyst	4.04	0	3	6	25	14	1	
	Org B Analyst	3.99	3	3	18	38	32	0	
	Org A Administration	2.42	2	6	2	1	1	0	
	Org B Administration	3.75	1	1	0	8	2	0	
	Org A Manager	3.41	2	2	3	7	3	0	
	Org B Mgr	4.26	0	1	1	12	9	0	
	Org A Project Manager	2.92	5	5	3	9	2	0	
	Org B Project Manager	4.29	0	0	3	6	8	0	
	8. I frequently have to stop what I am doing to deal with the unexpected	Organization A	3.69	0	20	21	42	27	1
		Organization B	3.33	2	50	41	57	28	1
Org A Program Manager		3.89	0	0	3	4	2	0	
Org B Program Manager		3.88	0	4	6	13	10	0	
Org A Analyst		3.52	0	12	9	17	10	1	
Org B Analyst		3.22	2	27	25	27	12	1	
Org A Administration		4.50	0	0	0	6	6	0	
Org B Administration		3.00	0	4	4	4	0	0	
Org A Manager		3.53	0	4	3	7	3	0	
Org B Mgr		3.43	0	7	2	11	3	0	
Org A Project Manager		3.67	0	4	6	8	6	0	
Org B Project Manager		3.00	0	8	4	2	3	0	

## Teamwork & Collaboration

*Teamwork and Collaboration* is the extent that an organization creates the conditions that encourage and enable organization members to work together effectively to achieve the goals of the organization. It includes culture patterns that examine responsiveness, consultation, relationship building and social dynamics.



Teamwork & Collaboration	Group	Ave	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
9. I know what other work is underway in Organization A / Organization B that may affect me	Organization A	2.97	9	30	32	35	5	0
	Organization B	3.23	10	48	38	54	27	2
	Org A Program Manager	3.33	0	2	2	5	0	0
	Org B Program Manager	2.97	1	15	5	8	4	0
	Org A Analyst	3.04	2	12	19	14	2	0
	Org B Analyst	3.16	6	24	24	27	12	1
	Org A Administration	2.17	2	7	2	1	0	0
	Org B Administration	3.00	1	3	3	3	1	1
	Org A Manager	3.76	0	2	3	9	3	0
	Org B Mgr	3.65	1	4	3	9	6	0
	Org A Project Manager	2.54	5	7	6	6	0	0
	Org B Project Manager	3.65	1	2	3	7	4	0

Teamwork & Collaboration	Group	Ave	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A	
10. We thoroughly understand the positions of different interest groups before making a decision	Organization A	3.13	4	33	20	49	3	2	
	Organization B	3.48	5	25	52	63	27	7	
	Org A Program Manager	3.44	0	2	2	4	1	0	
	Org B Program Manager	3.33	1	6	10	13	3	0	
	Org A Analyst	3.15	0	15	11	22	0	1	
	Org B Analyst	3.32	3	16	29	30	10	6	
	Org A Administration	2.25	2	7	1	2	0	0	
	Org B Administration	3.09	1	1	5	4	0	1	
	Org A Manager	3.47	0	4	2	10	1	0	
	Org B Mgr	3.91	0	2	4	11	6	0	
	Org A Project Manager	3.17	2	5	4	11	1	1	
	Org B Project Manager	4.24	0	0	4	5	8	0	
	11. I rarely have to follow-up with people in order to get the assistance that I need	Organization A	3.24	5	26	23	51	6	0
		Organization B	3.30	12	35	39	74	19	0
Org A Program Manager		3.44	1	1	1	5	1	0	
Org B Program Manager		2.61	5	11	9	8	0	0	
Org A Analyst		3.41	0	11	11	23	4	0	
Org B Analyst		3.49	5	14	20	40	15	0	
Org A Administration		2.50	2	5	2	3	0	0	
Org B Administration		3.33	1	3	0	7	1	0	
Org A Manager		3.29	0	3	6	8	0	0	
Org B Mgr		3.17	1	5	6	11	0	0	
Org A Project Manager		3.17	2	6	3	12	1	0	
Org B Project Manager		3.71	0	2	4	8	3	0	
12. We treat each other with respect at all times		Organization A	3.91	2	15	12	44	38	0
		Organization B	4.18	1	10	23	66	79	0
	Org A Program Manager	3.89	0	2	0	4	3	0	
	Org B Program Manager	3.64	1	5	7	12	8	0	
	Org A Analyst	4.14	0	3	6	21	19	0	
	Org B Analyst	4.22	0	4	11	39	40	0	
	Org A Administration	2.58	2	5	2	2	1	0	
	Org B Administration	4.42	0	1	0	4	7	0	
	Org A Manager	4.18	0	0	2	10	5	0	
	Org B Mgr	4.57	0	0	2	6	15	0	
	Org A Project Manager	3.92	0	5	2	7	10	0	
	Org B Project Manager	4.35	0	0	3	5	9	0	
	13. We confront others in an open and honest manner about problems or disagreements	Organization A	3.36	7	18	25	48	12	1
		Organization B	3.72	0	29	31	78	40	1
Org A Program Manager		3.44	0	2	2	4	1	0	
Org B Program Manager		3.30	0	10	6	14	3	0	
Org A Analyst		3.58	1	5	14	21	7	1	
Org B Analyst		3.69	0	15	19	39	20	1	
Org A Administration		2.50	2	6	1	2	1	0	
Org B Administration		4.00	0	2	0	6	4	0	
Org A Manager		3.65	1	0	4	11	1	0	
Org B Mgr		4.13	0	2	2	10	9	0	
Org A Project Manager		3.13	3	5	4	10	2	0	
Org B Project Manager	4.00	0	0	4	9	4	0		

Further tables omitted for brevity.