



# TOI Scorecard Report

## Team Performance Assessment Results for the Business Operations Unit

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**Report Prepared for**

**Sales Operations Team  
ABC Company Inc.**

*Illustrative Example*

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# How This Report is Organized

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## How To Read The TOI Scorecard Results

### The Talent Optimization Index (TOI) Score

The Talent Optimization Index (TOI) Score is the measure of how effectively a team is leveraging the time, talents, and energy of every team member. TOI Scores link directly with team performance results. Teams with higher TOI scores outperform teams with lower TOI scores. The TOI is calculated by combining each of the Six Practice Scores.

### The Six Team Practice Scores

The Practice Score data provides indicates how each of the Practices is impacting the performance of each team. It is used as a diagnostic tool to identify team strengths and gaps as well as organizational strengths and gaps.

### How the Team's Six Practice Scores are Calculated

Team members describe their experiences by responding to 5 questions in each of the six Practice areas.

Item responses are scored on a 1- 5 scale, shown below.

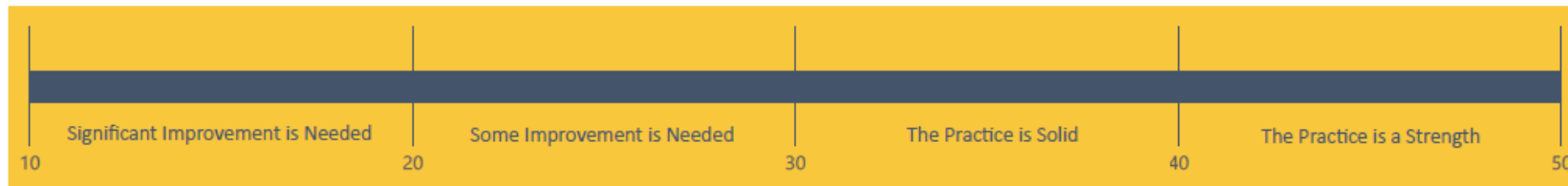
The team's scores for each of the Six Practices is the average (mean) of each team member's responses corresponding to the Practice. (The team's total score is converted to a 50-point scale).

Strongly Disagree	Disagree	Somewhat Agree	Agree	Strongly Agree
0	0	0	0	0
1	2	3	4	5

### Interpreting the Six Practices Scores

The Team Practice Scores range from 10 - 50.

As illustrated below, scores below 20 indicate significant improvement is needed. Scores over 40 indicate the Practice is a Team Strength.

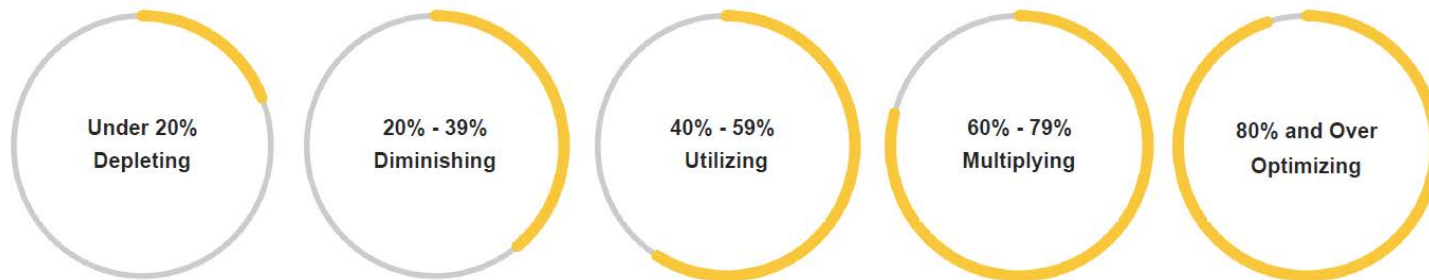




## How To Read The TOI Scorecard Results (cont'd.)

### How to Interpret TOI Scores

The TOI Score is calculated by combining each of the six Practice scores and converting the total score into a percentage (100%). TOI Scores are assigned to one of five categories, indicated below.



### How to Interpret the TOI Scorecard Results

The TOI Scorecard dashboard provides a snapshot of how effectively your teams are leveraging the talents and productivity of their team members. As you review the results of the teams across your organization, keep in mind that every organization, and teams within organizations, have different levels of expertise.

*Focus on the patterns and themes to identify areas for improvement, rather than absolute scores. What is most important is moving each team to its next higher level, using initial results as the starting point.*

### How We Calculate Talent Underutilization Costs

Our standard for a team that is optimizing the talents and contributions of every team member is the 80% TOI Score. We use this benchmark to calculate the salary costs of talent underutilization for teams with TOI Scores lower than 80%. We calculate the costs based on total hours dedicated to the team goals and the average salary cost of all team members. This data provides a reference point for business leaders in prioritizing team improvement investments.

*We recognize team underperformance can have significantly greater costs to the business and we encourage business leaders to consider those factors as well.*

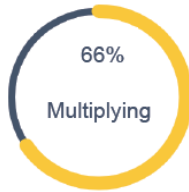


# TOI Scorecard Results Summary

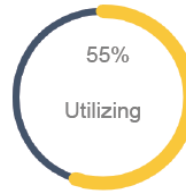
Customer Support



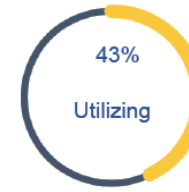
Sales



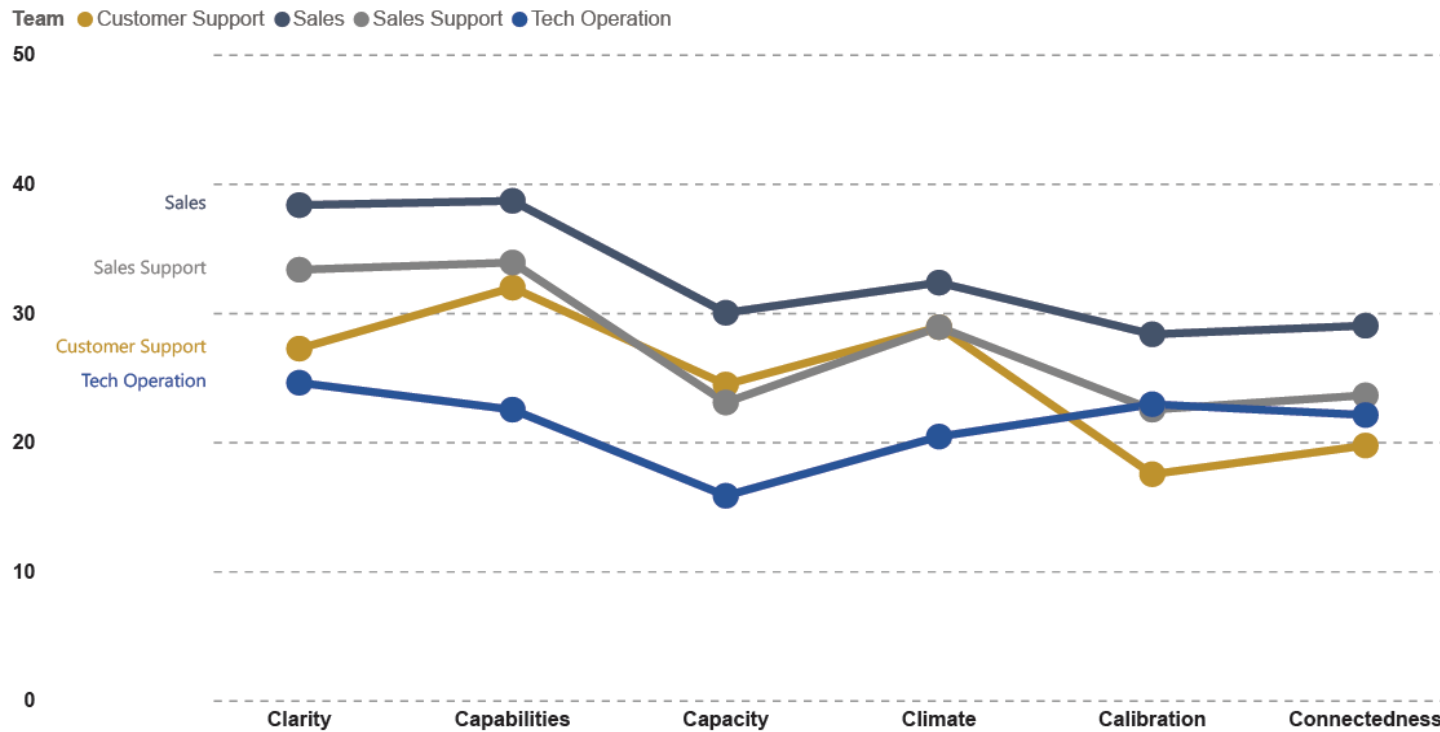
Sales Support



Tech Operation



The visual below provides a clear view of where each of the teams stand on each of the Team Practices. Across all teams, "Connectedness" is the lowest Practice score, indicating an area of improvement across the business unit.

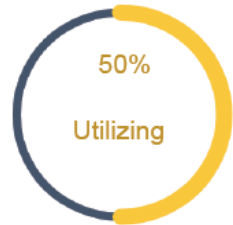




# TOI Scorecard Results Summary

## Costs of Talent Underutilization

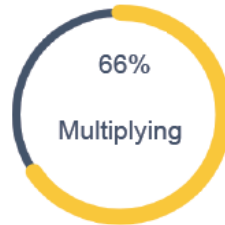
Customer Support



\$75K

Talent Underutilization Cost

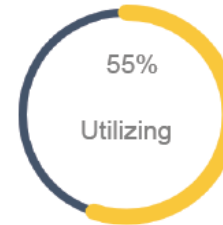
Sales



\$55K

Talent Underutilization Cost

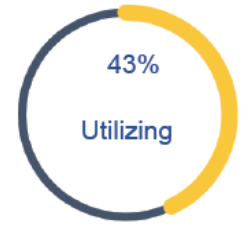
Sales Support



\$79K

Talent Underutilization Cost

Tech Operation



\$96K

Talent Underutilization Cost

The costs of talent underutilization are calculated for each team based on the average salary of the team members and the total work-hours of team members. The Tech Operation team has higher salary costs than the Support teams and more dedicated work hours.

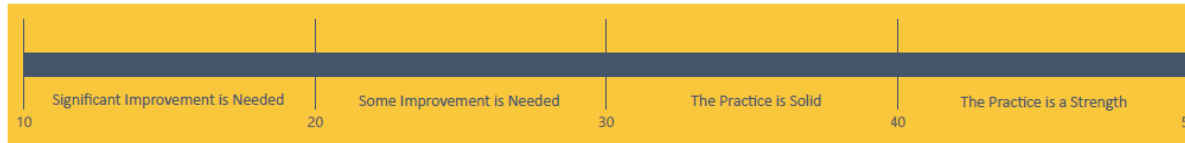
Taken together with the low TOI score, the Tech Operation team is incurring the greatest talent underutilization costs.

While the Customer Support team's TOI score is slightly lower than the Sales Support team, their salary costs are lower.



# Reading the Team Practice Score Results

Team Practice scores range from 10 - 50. Team Practice Scores are interpreted by considering the team's mean (average score) and the standard deviation, indicating the extent to which individual team member scores differ. For this analysis, a standard deviation greater than 4.00 indicates some individual team member scores varied significantly. The team's average score may be artificially low or high due to one team member's score.



Team Practice strengths are highlighted in green; Team Practice improvement areas are highlighted in red.

		Sales	Sales Support	Customer Support	Tech Operation
<b>Team Talent Optimization Index (TOI) Score</b>		66%	55%	50%	43%
<b>Clarity</b>					
The importance and impact of the team's goal is understood by every team member. Key milestones, measures of progress and metrics of success are clearly stated.	Mean Score	38.33	33.33	27.22	24.58
	Std. Deviation	4.56	2.98	6.21	0.83
<b>Capabilities</b>					
Each team member understands how their unique capabilities contribute to the work of the team and how the impact of their contributions will be measured.	Mean Score	38.67	33.89	31.94	22.50
	Std. Deviation	2.98	5.13	4.76	3.19
<b>Capacity</b>					
Team members have the time, tools, and energy to fully participate and the team utilizes resources effectively and efficiently.	Mean Score	30.00	23.06	24.44	15.83
	Std. Deviation	2.64	1.95	5.44	0.96
<b>Climate</b>					
Team members understand the unique talents of each member and know how to leverage their complementary talents to achieve more impactful results.	Mean Score	32.33	28.99	28.89	20.42
	Std. Deviation	5.60	4.43	3.90	0.83
<b>Calibration</b>					
The team is aligned on processes and practices; the team monitors progress and productivity.	Mean Score	28.33	22.50	17.50	22.92
	Std. Deviation	5.14	2.74	5.03	0.83
<b>Connectedness</b>					
The team uses technology tools efficiently and effectively to share information within and across the team; team members share information effectively across networks outside of the team.	Mean Score	29.00	23.61	19.72	22.08
	Std. Deviation	5.08	4.00	6.45	2.50



# Interpreting the Team Practices Scorecard Data

## Insights from the Focus Groups

The data collected from 1:1 interviews and focus groups with team members provides the necessary context to interpret the data and priorities for each team.

## Business Unit Scorecard Results

Each of the four teams has unique goals, challenges, and talents, reflected in part in the range of TOI scores. One Practice is an area of improvement across all teams: Connectedness. Insights from the focus groups: information sharing varies widely across each of the teams as well as other teams and functions across the organization. Messaging occurs through individual chats, Teams chats, emails and mobile text messaging. Files and documents may be located on a Microsoft Teams site, OneDrive folders external to the Microsoft Teams folders, or department specific Workgroup drives with limited access. Recommendation: Establish and adopt a consistent Data and Information Management Governance framework.

## Sales Team

The Sales Team can take their productivity and performance to an even higher level by including individual performance and productivity as part of their weekly Calibration reviews. The Business Unit-wide data and information sharing practices will also improve the sales team's productivity and performance.

## Sales Support Team

The Sales Support team needs to focus on Climate - understanding the talents of each team member and how to best leverage them and adopt a disciplined, weekly Calibration review focusing on individual productivity and performance. While Capacity needs to improve, insights from the focus group indicated that far too much time was spent on re-work and redundancies.

## Customer Support Team

The Customer Support team needs to gain a better understanding of all Six Practices. While Capacity is low, it is due to time wasted working on the wrong things - or too much time spent on low priority tasks. Clarity is the most important practice to focus on first.

## Tech Operations Team

The Tech Operations team productivity and performance is impacting the Business Unit in terms of costs of talent underutilization for this team and impacting all other teams since the integration of the technology platform and applications is impacting all other teams. The team members are frequently "pulled" from team activities for urgent requests for help. The first step needed to help this team succeed is support from the Team Sponsor and Key Stakeholders in providing other resources to address urgent issues and requests so that the team members can dedicate the time and energy needed to this team's work.

This team needs to gain a better understanding of the Six Practices and adopt a disciplined, weekly Calibration review to rebalance resources as priorities change.





## Implications and Recommended Actions

### Summary

All of these teams (and likely all other teams in the business unit) will operate more effectively and efficiently by more consistent data management and information sharing processes.

While all teams will likely see increased talent optimization by participating in the team development coaching workshops, investing in developing the Tech Ops team practices and processes is most important.

This team has the lowest level of talent optimization and highest talent underutilization costs, and, their work impacts the productivity of all other teams since they are responsible for developing and implementing automated processes.

### Priorities

<b>#1</b>	The senior leadership team needs to determine the best course of action to address the inefficiencies and productivity losses associated with the disparate data and information management systems.
<b>#2</b>	Tech Operations team: review this team's TOI results with team sponsors, business unit leadership and key executive stakeholders to discuss findings and implications. Address resource constraints and initiate team development intervention plan.
<b>#3</b>	Tech Operations Team: Conduct Team development workshops with all team members, providing detailed insights into understanding individual TOI scores. Apply the six practices framework through action learning sessions, guiding the team through by action- three rounds of "review and recalibrate" sessions. Re-administer TOI after four weeks to assess impact and address any outstanding priorities.
<b>#4</b>	Review the detailed TOI team assessment report for each team with the respective team leaders. Engage team sponsors and key stakeholders in the review sessions as appropriate. Assess the level of support the team leaders for the Customer Support and Sales Support teams need. Develop action plans with team leaders to address their top priorities.