



Optimizing Organizational Performance

Organization-wide insights into worker engagement, productivity, team performance and team leader effectiveness



The TOI Scorecard – The Insights You Need

Business leaders that strive to improve the engagement, productivity and performance of every workforce talent are often challenged with disparate data.

- Engagement surveys measure organizational commitment and intent to stay.
- Team results measure the performance of the overall team.
- Individual performance ratings differentiate among the top and bottom 10% with little differentiation across the other 80% of the workforce.

The TOI Scorecard measures individual team member engagement, productivity, and contributions within and across the teams in your organization giving you a clear view of the drivers of team performance results.

The TOI Scorecard analytics provide:

- Identification of the strengths of the practices across your organization as well as areas to address across the organization, instead of one team at a time
- Insights into the effectiveness of individual team leaders, informing personalized team leader development
- Team-specific talent underutilization costs to inform investments in development

The TOI Scorecard Process

1. Initial Client Meeting

We gain an understanding of the business context: business goals, current and targeted results, and your organizational structure. We learn about your challenges, what you would like to achieve and discuss opportunities.

2. Stakeholder Alignment Session

We meet with key stakeholders to understand their top business priorities and key challenges. We review the project scope, objectives, timing, and expectations for leader support.

3. Communications Plan

We partner with your internal communications team to develop and cascade communications for all audiences about the initiative: business leaders, managers, team leaders, team members, employees. Our communications support continues throughout the initiative with timely progress updates, through our key findings and next steps your organization will take.

4. Discovery Meetings

Business SMEs meet with us to provide an overview of core business processes, technology platforms, information sharing practices and business performance metrics.

We meet with Team Leaders and Team Sponsors to introduce the Talent Optimization Team Assessment and the *Fit to Flow* team development framework. We learn about team design, practices, and team performance measures. Team Leaders share their team's goals, strengths, and challenges.

5. Team Talent Optimization Index (TOI™) Assessments

We meet with each team separately to introduce the team assessment process. Team members complete the TOI assessment, describing their experiences on the team. Then we conduct a focus group with team members to gain a deeper understanding of the team's practices.

6. Diagnosis

We analyze the TOI data and focus group results for each team, identifying team strengths, challenges, and pain points. A team TOI assessment report is prepared for each team, summarizing findings, recommended actions and development plans for the team leader.

7. TOI Scorecard Analysis

We analyze the TOI data across all teams to identify consistent themes impacting engagement, productivity, and performance across all teams and isolate strengths and challenges unique to a particular team.

We measure costs of Talent Underutilization using the TOI results and the salary costs of the team members' time requirements. Business leaders may also calculate impacted costs to the business.

8. Leadership Insights Session

We share the TOI Scorecard results with the leadership team and discuss findings, implications, and review recommended action plans. We facilitate the discussion with the leadership team to identify organization-wide initiatives. We provide the level of support you need to develop and implement the plan and measure impact and outcomes.

9. Team Leader Action Plans

We meet with each team leader to review their team assessment results and personal development plan. Team Leaders receive the level of support needed to communicate results and action plans with their team members.

10. Team Development Initiatives

We offer three levels of team support:

- (1) coaching sessions with team leaders,
- (2) a team workshop to learn about the Fit to Flow team practices model and how the practices are measured in the TOI assessment. We share the team's assessment results and provide individual team members with their personal TOI report ("MyTOI") which includes personal action plans to improve their productivity and their contributions to the team.
- (3) a four-week action learning program with the team applying the *Fit-to-Flow* model, conducting weekly calibration sessions to review and recognize individual and team progress and facilitate the team recalibration session to enhance team productivity and performance.

11. Team Re-Assessments

Following the implementation of team development action plans, we re-administer the TOI to identify the progress the teams have made and ways in which they can build a go-forward plan to further enhance and sustain strong team performance results.

Team Leader Effectiveness is assessed at this time, which is usually 4- 8 weeks following the initial TOI Assessment. We analyze changes in the team's 6 Practice Scores, the change in the overall TOI score and team performance trends.