



Talent Optimization Index Team Assessment Results

Report Prepared for

Management Team

Sample Report

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How This Report Is Organized

How to Read Your Results

Pages 3-4

This page describes how the Talent Optimization Index and the Six Practice scores are calculated and how to interpret your results.

Your Overall Results

Page 5

The overall results are displayed on a graph, indicating the team's scores on each of the practices, and the Team's Talent Optimization Index (TOI) Score, calculated by combining each of the Practice scores.

The Six Practices Snapshot indicates the team's average (mean) score for each of the practices.

Six Practices - Detailed Results

Pages 6 - 11

The detailed results section displays the team's average score as well as the scores of each team member for each Practice, indicating where each team member stands.

If one team member's scores are far lower than others, the gap needs to be addressed to optimize the productivity of every team member.

The interpretation of this data includes the information gathered in the focus group sessions, providing the necessary context to understand the scores.

Implications and Actions

Page 12

This section summarizes the results for all Six Practices and the most important priorities to address first.



How to Read Your Results

How the Talent Optimization Index (TOI) Score is Calculated

The TOI Score is calculated by combining each of the six Practice scores and converting the total score to into a percentage (100%).

How the 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.

Item scores are added together calculate the Practice score.

Each Practice score is multiplied by 2 to convert the score to a 50-point scale.

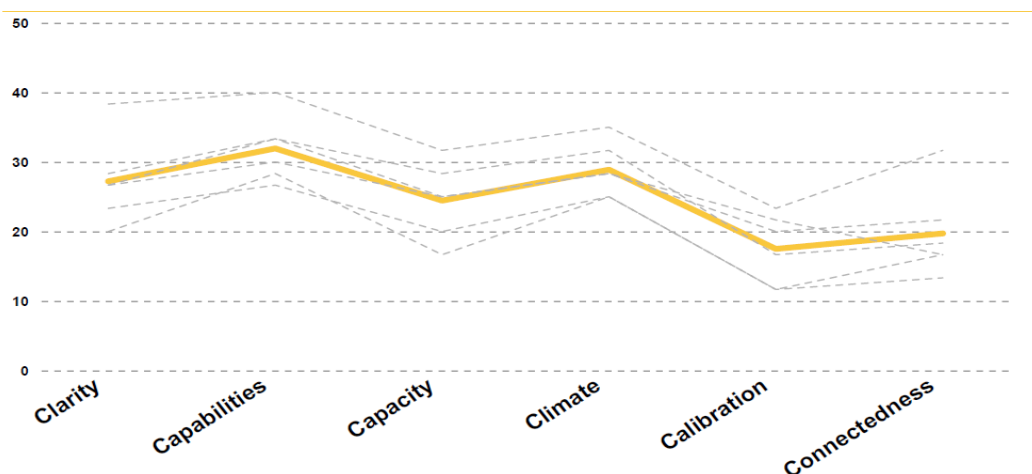
Strongly Disagree	Disagree	Somewhat Agree	Agree	Strongly Agree
0	0	0	0	0
1	2	3	4	5

How the Team's Practice Scores are Calculated

The Team's Score on Each Practice area is calculated by averaging the scores of each team member. The results are shown on a graph, depicted below.

The team's average score is indicated by the solid yellow line.

The scores of each team member are indicated by the dotted lines.



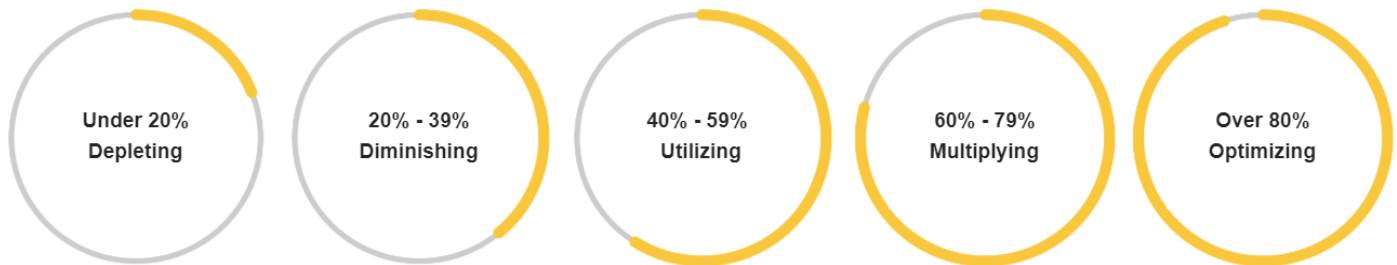


Interpreting Your Talent Optimization Index (TOI) Score

TOI scores are assigned to one of five categories describing the extent to which the team environment utilizes the time, talents, and every of every team member.

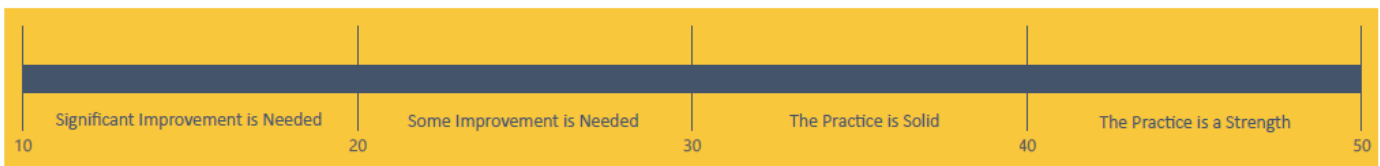
The TOI scores range from a low of 10% to a high of 100%

The visual below describes each of the TOI score categories.

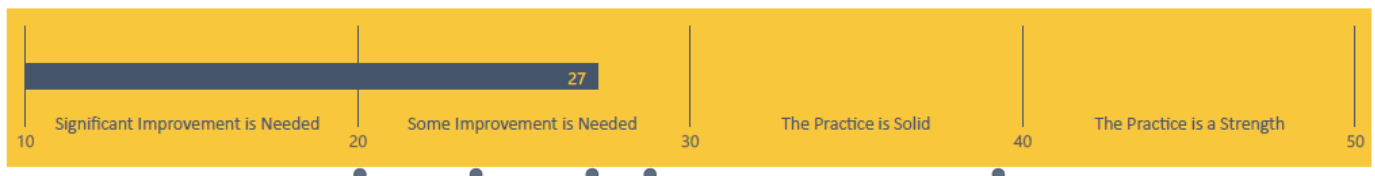


Interpreting the Six Practices Scores

The Six Practices scores range from 10 - 50.



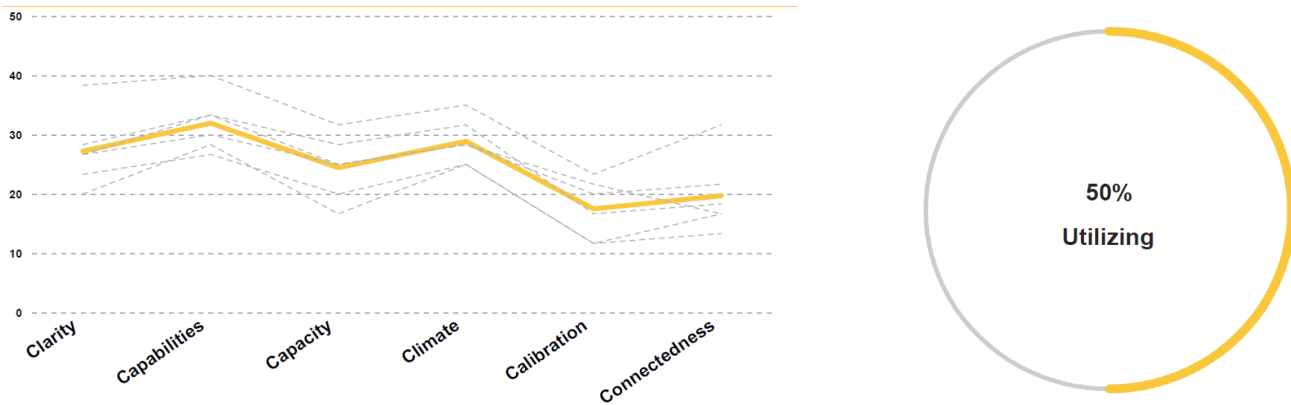
Your team's results for each of the Six Practices will be displayed on a bar chart. The markers below the bar chart will indicate each team member's score on the Practice.





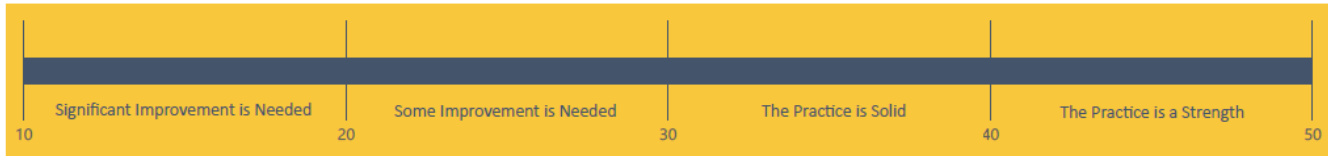
Your Talent Optimization Index Score

Your team's overall Talent Optimization Index (TOI) score of 50% indicates it is leveraging about half of the team's talents, time, and energy.



Six Practices Snapshot

The Six Practice definitions and the team's average (or mean) score for each practice is displayed below.



<p>Clarity 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.</p>	27
<p>Capabilities 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.</p>	32
<p>Capacity Team members have the time, tools, and energy to fully participate and the team utilizes resources effectively and efficiently.</p>	24
<p>Climate Team members understand the unique talents of each member and know how to leverage their complementary talents to achieve more impactful results.</p>	29
<p>Calibration The team is aligned on processes and practices; the team monitors progress and productivity.</p>	18
<p>Connectedness 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.</p>	20



Detailed Results - Clarity

How To Read the Detailed Results

The bar chart displays the team's average score. The markers below the bar chart indicate each team member's score on the Practice. This provides you with an understanding of each team member's experience.

If one or more of your team members scores in the "improvement needed" area, their experiences will impact the productivity and performance of other team members and need to be addressed.

Clarity

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.

27



Interpreting the Data

The team's average score, 27, is overly high due to the score of 38 for one team member. The other team members' scores range from 20 - 27, indicating improvement is needed.

Insights from the Focus Group

This team is tasked with leading a significant change in serving customers as the business transitions to a self-service model for customer reports. Some team members are concerned that customers will not receive the level of personal attention they have been given and expect to receive from the support associates; they are concerned that achieving this goal will have a negative impact on both customers and associates. The anticipated benefits of the outcomes need to be clearly stated and supported with data and metrics. This will likely require the team sponsor and key stakeholder involvement. In addition, the work of the team needs to include a plan for the "people side" of change, starting with this team, then including all key stakeholders, particularly customers and associates.



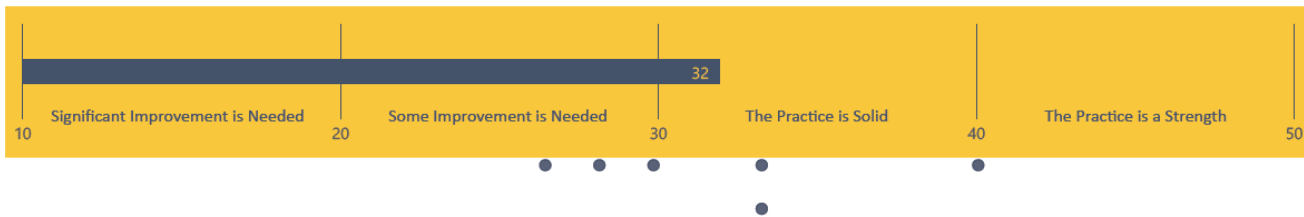
Detailed Results - Capabilities

How To Read the Detailed Results

The bar chart displays the team's average score. The markers below the bar chart indicate each team member's score on the Practice. This provides you with an understanding of each team member's experience.

If one or more of your team members scores in the "improvement needed" area, their experiences will impact the productivity and performance of other team members and need to be addressed.

Capabilities 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.	32
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Interpreting the Data

The team's average score, is 32, is inflated due to the score of 40 for one team member. All other team members' score range from 20 - 27, indicating improvement is needed. In focusing on Goal Clarity (the first practice) it is important to specifically link the work to be done with team member capabilities.

Insights from the Focus Group

The lack of clearly defined goals and workstreams are impacting the scores on this Practice. Many team members are unclear how their capabilities are contributing to the team's goals and how their contributions are being measured.



Detailed Results - Capacity

How To Read the Detailed Results

The bar chart displays the team's average score. The markers below the bar chart indicate each team member's score on the Practice. This provides you with an understanding of each team member's experience.

If one or more of your team members scores in the "improvement needed" area, their experiences will impact the productivity and performance of other team members and need to be addressed.

Capacity Team members have the time, tools, and energy to fully participate and the team utilizes resources effectively and efficiently.	24
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Interpreting the Data

The team's average score, 24, indicates this Practice is an area of improvement. Only one team member scored above 30; all others scored below 30. Additionally, the low score of 17 for one team member indicates the team member is struggling to find the time and energy required to fully participate, which is impacting this member's productivity as well as the productivity of other team members.

Insights from the Focus Group

Team members have not been "freed up" from day-to-day activities to dedicate the time and energy required for the team.

They described being stretched thin, handling the day-to-day and responsibilities of this team. The time and energy drain are compounded due to staffing shortages on the teams they manage daily.

Addressing this issue requires the engagement of the team sponsor and some key stakeholders. Left unaddressed, Capacity issues will have an even greater negative impact on team productivity and performance.



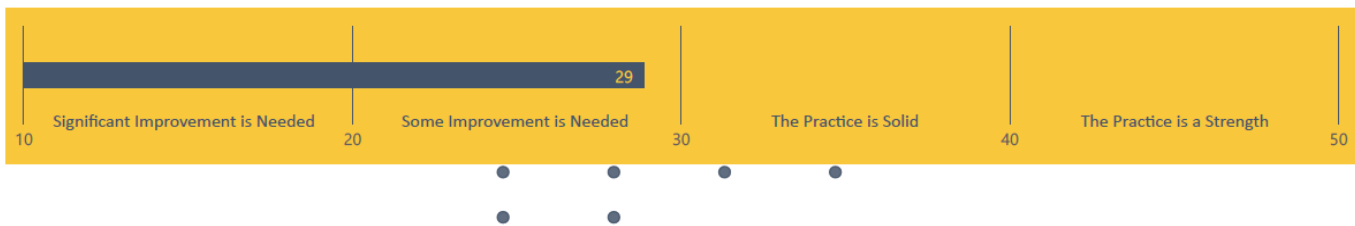
Detailed Results - Climate

How To Read the Detailed Results

The bar chart displays the team's average score. The markers below the bar chart indicate each team member's score on the Practice. This provides you with an understanding of each team member's experience.

If one or more of your team members scores in the "improvement needed" area, their experiences will impact the productivity and performance of other team members and need to be addressed.

Climate Team members understand the unique talents of each member and know how to leverage their complementary talents to achieve more impactful results.	29
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Interpreting the Data

The team's average score of 29 is artificially high due to one team member's score of 35. The results of the majority of the other team members are 28 or lower. Focusing on Clarity and Capabilities should help improve Climate.

Insights from the Focus Group

Team members described being assigned to tasks and activities based on their job titles and being directed to "stay in their lane". Many feel that they have knowledge and experiences that would add value in setting priorities and identifying root cause issues. Moreover, team members feel they have little input into how to determine which information to gather and how to interpret the results of the data.



Detailed Results - Calibration

How To Read the Detailed Results

The bar chart displays the team's average score. The markers below the bar chart indicate each team member's score on the Practice. This provides you with an understanding of each team member's experience.

If one or more of your team members scores in the "improvement needed" area, their experiences will impact the productivity and performance of other team members and need to be addressed.

Calibration The team is aligned on processes and practices; the team monitors progress and productivity.	18
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Interpreting the Data

The team's average score of 18 indicates this Practice is in need of significant improvement. The lack of Calibration is taking a toll on Capacity and overall team productivity.

Insights from the Focus Group

The team members indicated a lack of discipline and consistency in measuring and tracking progress and productivity. The team has not established a regular cadence of progress reviews. Barriers are not addressed until they become obstacles that required significant time and efforts to remove. Individual team member workloads are not considered in assigning tasks; at times some team members have very little work assigned while other team members feel overloaded.



Detailed Results - Connectedness

How To Read the Detailed Results

The bar chart displays the team's average score. The markers below the bar chart indicate each team member's score on the Practice. This provides you with an understanding of each team member's experience.

If one or more of your team members scores in the "improvement needed" area, their experiences will impact the productivity and performance of other team members and need to be addressed.

Connectedness 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.	20
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Interpreting the Data

The team's average score of 20 indicates significant improvement is needed. The scores of the individual team members indicate that the low score of 20 is artificially high due to one team member's score of 32. The results of all other team members indicate this is a Practice in significant need of improvement. impacting individual and team productivity.

Insights from the Focus Group

Team members described gaps in sharing information within the team that resulted in re-work and duplication of efforts. Additionally, requests for information from other teams and departments is slow, causing significant delays. The team indicated that communications from the Team Sponsor, alerting the team of shifting stakeholder priorities, resulted in producing reports that were no longer relevant.



Implications and Actions

Summary

The consistent theme impacting individual and team performances, as indicated in low scores in most all Practices, is the lack of goal Clarity. Team members need more data and facts to understand the benefits to the business and customers that will result with the adoption of the self-service model.

While the longer-term benefits may be positive, in the short-term, the transition will require customers and support associates to change the ways they access information and provide support. Currently, the workplan for the change is vague' some team members view it as non-existent. The work of the team needs to include the change impacts and change plan.

A clearer statement of the goals and anticipated benefits needs to be supported by additional facts and data. Goal Clarity also encompasses the key workstreams and milestones for the team. A more detailed work plan will enable the mapping of team member capabilities, capacity, and resources.

Priorities

#1	Present the Talent Optimization Index (TOI) results to the team. Review strengths and challenges identified. Seek team member input about how the challenges are impacting team member productivity. Discuss actions for improvement, starting with a clear focus on Goal Clarity.
#2	Conduct a working session with all team members, the team sponsor and SME's from Finance and Technology Operations to review the business case. Enlist a facilitator to guide discussion and review of the team's goals, progress measures and success metrics. Develop the Change workstream plans: establish the roadmap, project milestones, timing and engagement of Change Leads.
#3	Team Leader to meet 1:1 with each team member following the working session to review alignment of capabilities and capacity.

Action Plan
