

# Organizational Vital Signs

OVS provides a practical, rapid, reliable process for tracking the people side of the organization. Easily customized, the OVS compares various constituencies to identify areas of alignment and misalignment as well as strengths and weaknesses in the organizational climate.

**OVS** ORGANIZATIONAL  
VITAL SIGNS

## OVS Applications

### Transformation

From new strategy, restructuring, RIF, or M&A, organizations frequently face the need for significant structural change. But the brutal fact is that the vast majority of these efforts fail to produce the desired outcome – usually because people are not on board. The first step to changing that pattern is to understand the current reality. To what degree are your people committed and on board? What’s their level of trust and readiness? Do you have the leadership to drive the change? If not, where are there pockets of opportunity?

### Planning

In the past, organizational value was primarily determined by financial and material assets. Some leaders are seeing it differently – they genuinely believe that people are their greatest asset, and they take seriously the responsibility for planning for the development of this resource. In the past, they may have used other tools to collect employee perspective, but it was vague, slow, and cumbersome. OVS quickly provides just enough data to keep the employees on the performance dashboard.

### ROI

As described for the TVS, there is a growing need to measure the efficacy of development programs. By using the OVS before and after an intervention, the results become transparent – increasing focus and accountability.

## OVS Administration

There are typically four phases to using the OVS:

1. Customization
2. Delivery
3. Presentation
4. Planning

### 1. Customization Phase (OVS Administration)

Part of the unique value of OVS is the ability to rapidly customize the tool; this planning process also serves as part of the engagement process. Using this opportunity, key stakeholders begin to consider key questions for the organization's continued growth.

#### 1. Planning

The consultant and client meet to define a project and communication plan, with key questions such as:

- What are the project goals?
- Who will take the OVS? (Tip: as the tool is very low cost, more is better. While statistical significance may require a relatively small number, having the majority of participants creates momentum.)
- When will the survey commence, end? (Tip: Shorter time periods with an extension, if needed, seem to be more effective.)
- Do all employees have access to computers? If not, will managers make their computers available (and leave the room while employees answer the survey)? Or will computers be set up and staffed by HR in the break room (for example) for employees to complete the questionnaire?
- Will a paper version be required? If so, how will it be collected? Who will employees trust to turn in the reports? (Tip: Paper surveys add time and expense to the project.)
- Who needs to be told about the survey? Who will provide that communication? When? (Tip: It usually requires 2-3 communications to get

sufficient response. It's helpful when middle managers, as well as senior managers, support this.)

- Once the report is generated, who will receive results? How?
- How will results be communicated back to managers and employees?

## 2. Questionnaire Setup

The OVS report will offer comparisons between different constituencies such as departments, sites, job roles, etc. In order to make a comparison, respondents will need to identify which of these groups they belong to.

The consultant and client need to define the demographic questions and possible answer choices.

In addition to the 38 items built into the questionnaire, it can be useful to ask a selection of organization-specific questions. For example...

- If you could tell the CEO one idea to improve the company, here's your chance. What do you want to tell \_\_\_(name)? (open)
- Which of our core values are we **most** successfully bringing to life in the organization? (multiple: loyalty, integrity, people, growth, value)
- Which of our core values are we **least** successfully bringing to life in the organization: (multiple: loyalty, integrity, people, growth, value)
- In regards to the previous question, what's one way we could improve this? (open)
- The national sales office effectively supports field reps (rating)
- The sales reps effectively dialogue with office staff (rating)
- The national office supports you to be successful (rating)
- We are one organization with one shared mission (rating)
- When we say \_\_\_\_ (slogan) here, we really mean it (rating)
- As an organization, we are serious about our commitment to green business (rating)
- Please give an example of why you gave the rating above (open)
- I am appropriately included in decisions (rating)

The consultant logs into the Tools Intranet to create the project. Project setting variables include:

- Project name
- Consultant and client logos
- Project closing date
- Questionnaire and norm languages
- Instructions on the survey
- Demographic questions and answer choices (up to 6 questions and 18 options for each; note that graphs with over 5 groups are hard to read).
- Custom questions - and answer choices if multiple choice; up to 18 questions can be added, and up to 6 options are available for multiple choice.

On project creation, a custom URL is automatically generated for the survey.

## **2. Delivery Phase (OVS Administration)**

The survey is communicated to those who should complete it. Depending on the organization, this could include a mix of emails, voicemail announcements, stand-up meetings, and direct calls to key managers asking them to remind their team members.

At any time, the consultant can check the Tools Intranet to see the number of responses in each demographic category. This can identify, for example, if a particular constituent group is not responding at a sufficient rate.

Typically we recommend a short window of time to complete the survey + extension(s); for example 4-5 days, plus a 3-day extension. Then, an additional extension if needed.

Once the survey is closed, the consultant can log in and generate the report.

## **3. Presentation Phase (OVS Administration)**

In a typical project, an individual or small team from the client will drive the project. Usually the consultant shares the data first with that team (in person or virtual meeting).

Typically the results are then shared with the senior leadership team (in person or virtual meeting).

Next, it is invaluable to communicate results back to the organization; for example, some combination of:

- Senior managers can brief their direct reports (certain graphs or data from the report can be provided).
- A memo can be drafted capturing key points from the feedback and leadership response.
- Meetings can be held to present and discuss the feedback.

In the Planning phase, these steps should be scheduled in advance so there is little lag between the completion of OVS data collection and the presentation of results.

#### 4. Planning Phase (OVS Administration)

Usually the OVS will lead to action planning. This final phase might consist of meetings and proposal development to address key issues raised through the assessment process. This leads to a new scope of work.

## OVS Cost

OVS is priced based on number of people in the survey group, as follows:

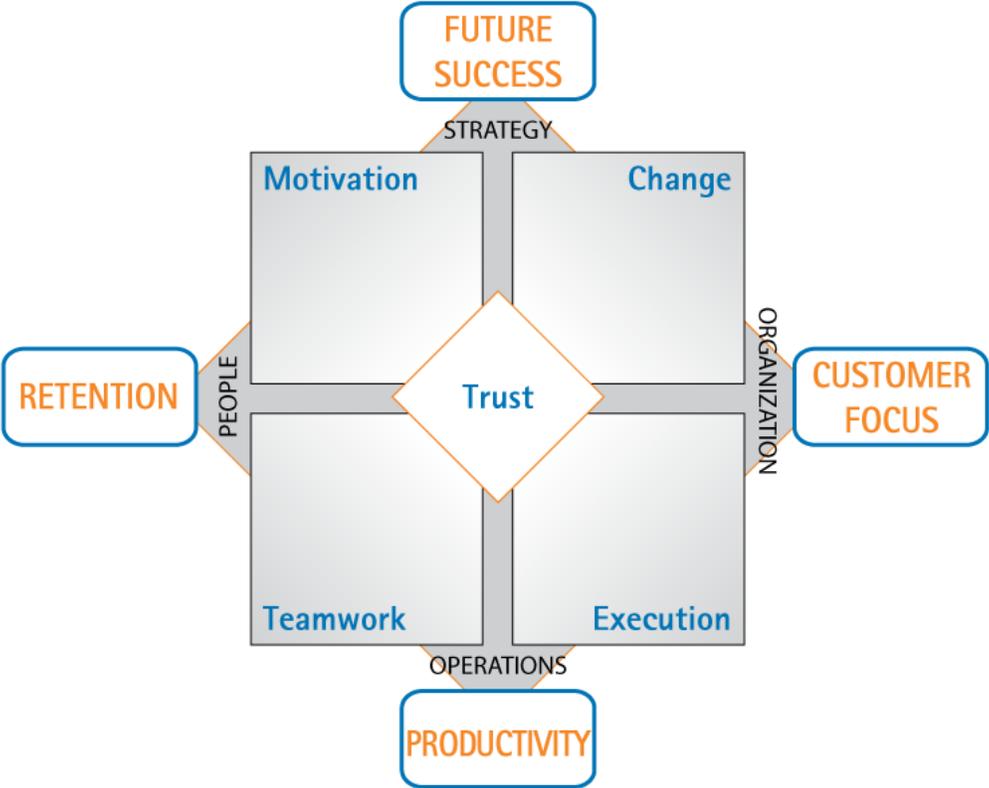
Project Size	Credits	Consultant Price*	Suggested Retail
<50 people	750	\$713	\$990
51-250 people	1500	\$1275	\$1,990
251-500 people	3000	\$2340	\$2,990
501-1000 people	4500	\$3510	\$4,990
1001+ people	7500	\$5850	\$7,990

\*This price based on purchase of one assessment. Credits are priced by volume, and can be used interchangeably toward any VS or SEI assessment.

# OVS Model

All the Vital Signs tools use the same core model of performance drivers. In addition, each VS tool includes a **second questionnaire** about performance outcomes. These outcomes are different for each tool.

The OVS outcomes are shown in the following graphic:



## OVS Outcomes Defined

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Customer Focus	Do people perceive a commitment to genuinely care for customers in order to create loyalty?
Productivity	Are people accomplishing the work at hand and the work that matters in an efficient manner?
Future Success	Is the organization moving in a sustainable, valuable direction?
Retention	How committed are employees to remaining in the organization?

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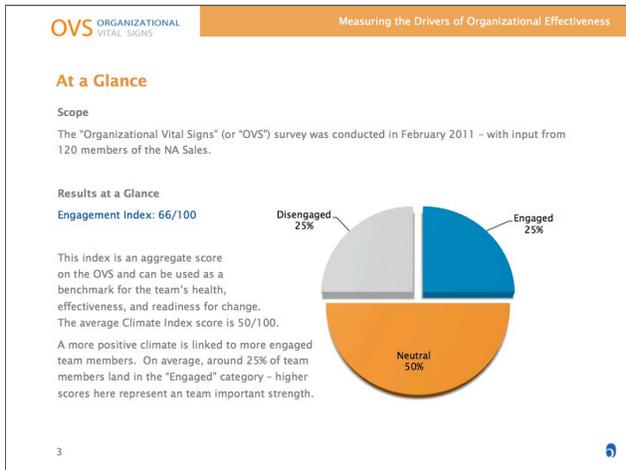
As you can see visually, above, there is one outcome per dimension. For example, Productivity is an outcome tied to Operations, which is a mix of Teamwork + Execution (on a baseline of Trust which is part of all dimensions).

## OVS Sample Result

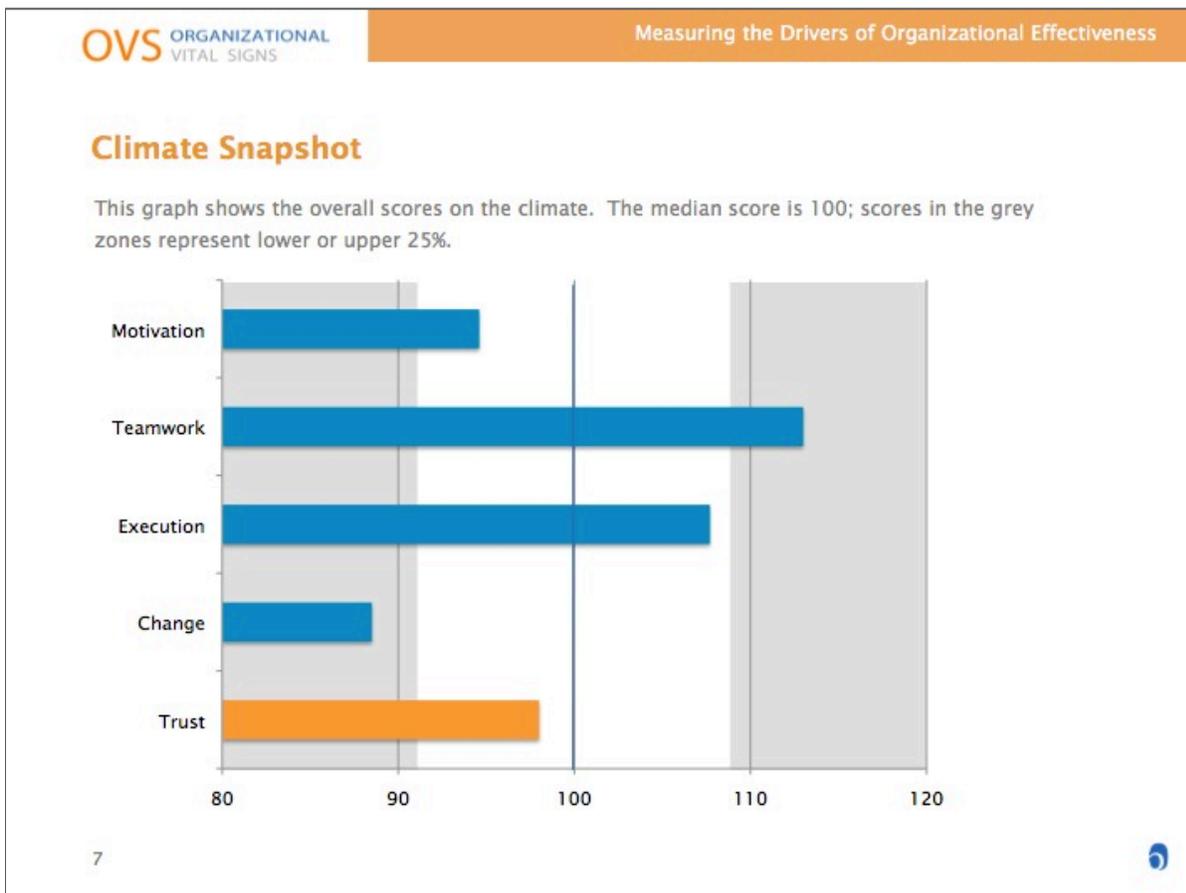
The OVS report includes:

- Executive Summary: Summary including overall engagement index and graph breaking down the group into engaged vs not-engaged vs undermining
- The Vital Signs Model: Introduction to the framework
- Climate Snapshot: Graph and numerical table of scores
- Climate and Performance: Explanation of outcomes
- Outcome Scores: Graph and numerical table of scores
- Combined Scores: Graph of drivers and outcomes together
- Critical Items: Graph of highest and lowest scoring items
- Comparisons: Graph of scores based on demographic groupings
- Conclusions: Synthesis and recommendations
- Comments (Appendix): Text of narrative comments

Sample from the Executive Summary showing the engagement index:



Sample of a Climate Snapshot. The mean score is 100. Scores in the lower quartile (left grey bar, Change in this case) represent areas of significant challenge. Scores in the upper quartile (right grey bar, Teamwork in this case) represent significant strengths.



This sample of a Comparison graph is based on roles (Team Member, Manager, Senior Manager). The Comparison graphs are generated based on the custom demographic questions. Thus, any relevant comparisons could be included (such as comparisons by role, position, seniority, job classification, work location, project focus, etc).



This sample of a Critical Items chart shows the overall highest and lowest scoring questions. This provides both nuance and depth of understanding about the climate and helps move the discussion of results toward action.

