

HALO SERVICE
FEEDBACK FROM YOUR MANAGEMENT SNAPSHOT[©]
BASED ON THE CAPABILITY SNAPSHOT[®]
The Global Standard For Evaluating Organizations

An integral and indispensable part of an organization evaluation is understanding and making sense of the results. This is true for the Management Snapshot as much as for the Capability Snapshot.

We will be contacting you to arrange a confidential group sensemaking session (by telephone), included in the cost of the Management Snapshot, to assist you in the sensemaking process.

There are four sections or modules in this feedback report. A guide is provided for each section. It is suggested that, prior to the telephone sensemaking session, you read the complete report.

In addition, and because the Management Snapshot is based on the principles of the Capability Snapshot, we recommend that you:

- Review the DISCOVER section of our web site beforehand,
- Keep a printout of the Understanding it page, which includes the framework model and definitions of the 5 Strategic Challenges and 15 Essential Capabilities, handy for reference.

SECTION I

STRATEGIC CHALLENGES MODULE

Guide

The Capability Snapshot is based on a researched model that sets an ideal for organization success. The realization of this vision is based on the organization striving towards five Strategic Challenges, each of which is operationalized by three Essential Capabilities.

The first page of this report module contains a bar chart which displays your management group rating of each Challenge ranked in descending order.

The second page contains a lens which shows the strategic alignment of your organization, and the make-up of each Strategic Challenge rating based on the scores for each Essential Capability that comprise them. The lighter shaded areas on the lens reflect the strongest Challenges, while the darker shaded areas reflect the weaker ones.

The third page contains a line chart that shows the Challenge rating of each individual respondent. In addition, there is a bar chart showing the average Challenge rating of the group in the same order as in the line chart.

Points to consider

1. The absolute rating (score) is not as important as the ranking. However, a guideline comparison of the group Organization Rating (the average of the 5 Challenges) is shown in Section IV. The top ranked Challenge could be considered a strength, especially if the three Capabilities whose average it is based on are closely ranked together (see Section II). If not, your management group should try to understand the basis for this divergence.
2. The line chart comparing the individual ratings to the average highlight converging or diverging perspectives among the respondents. If the ratings of each are close together and their pattern is similar, the management group have a common view of the organization. Any divergences (either in the pattern or if one or more respondents is widely separated from the others) should be discussed and understood.
3. The lens will indicate the strategic focus of the organization, i.e. is it aligned to the present or future, etc. Is this the desired focus?

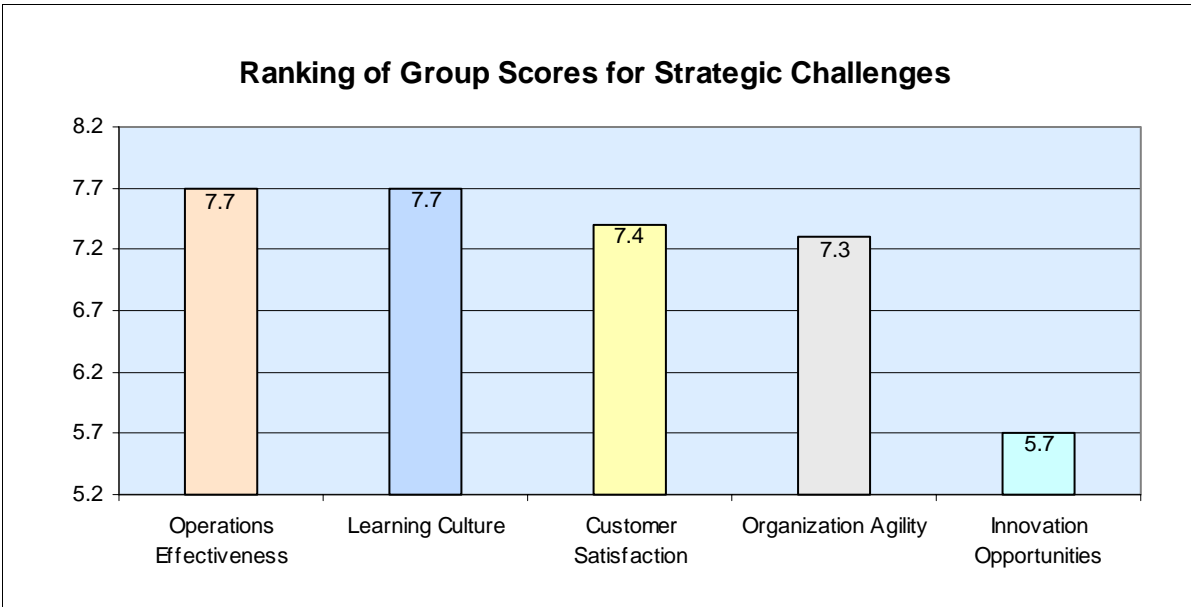
Questions to stimulate group discussion

Is this the strategic alignment the group anticipated?

Discuss the divergence of their ratings and try to identify why.

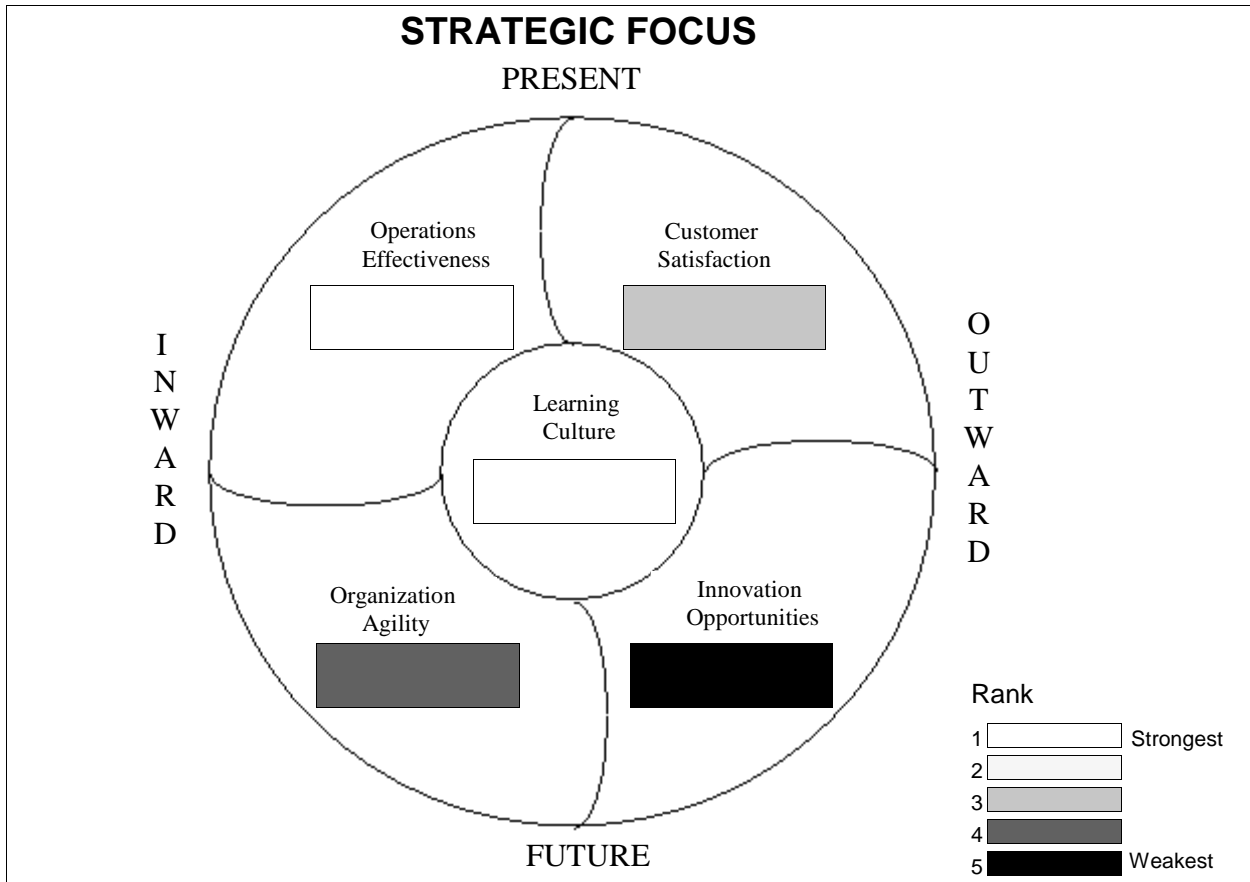
Would customers and employees agree with the ranking of management?

SECTION I - STRATEGIC CHALLENGES



Strategic Challenges	Rank	Group Score
Learning Culture	1	7.7
Operations Effectiveness	1	7.7
Customer Satisfaction	3	7.4
Organization Agility	4	7.3
Innovation Opportunities	5	5.7

SECTION I - STRATEGIC CHALLENGES



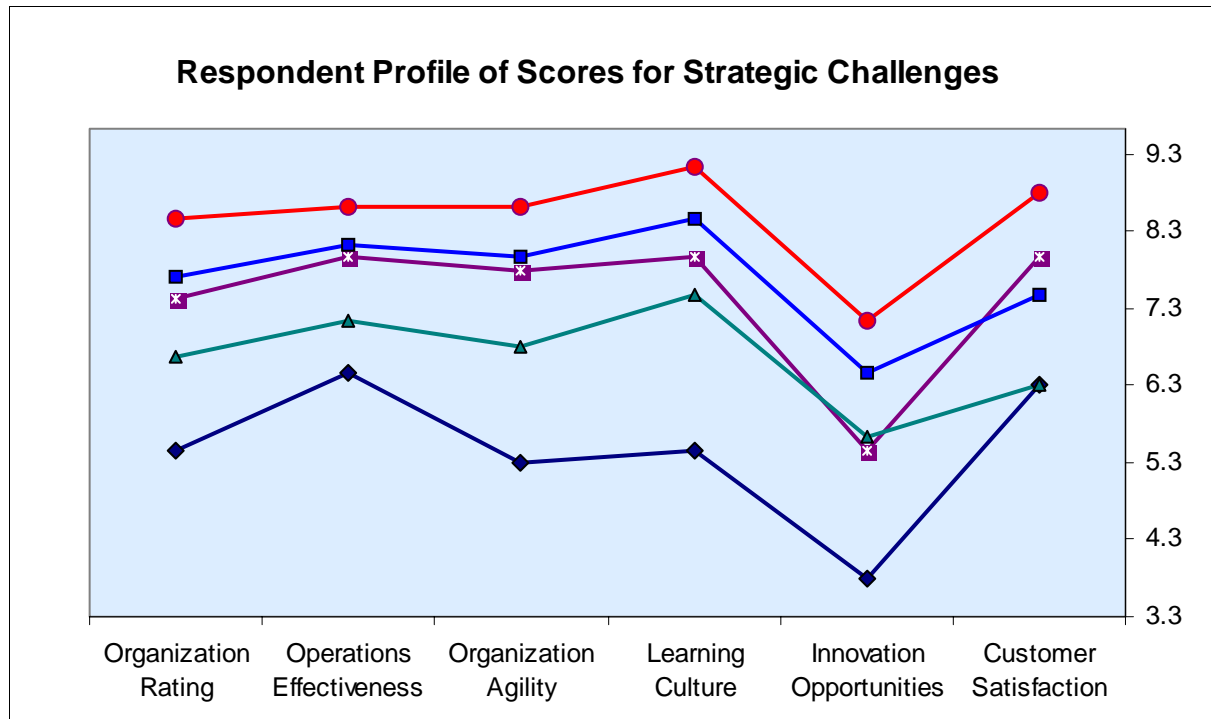
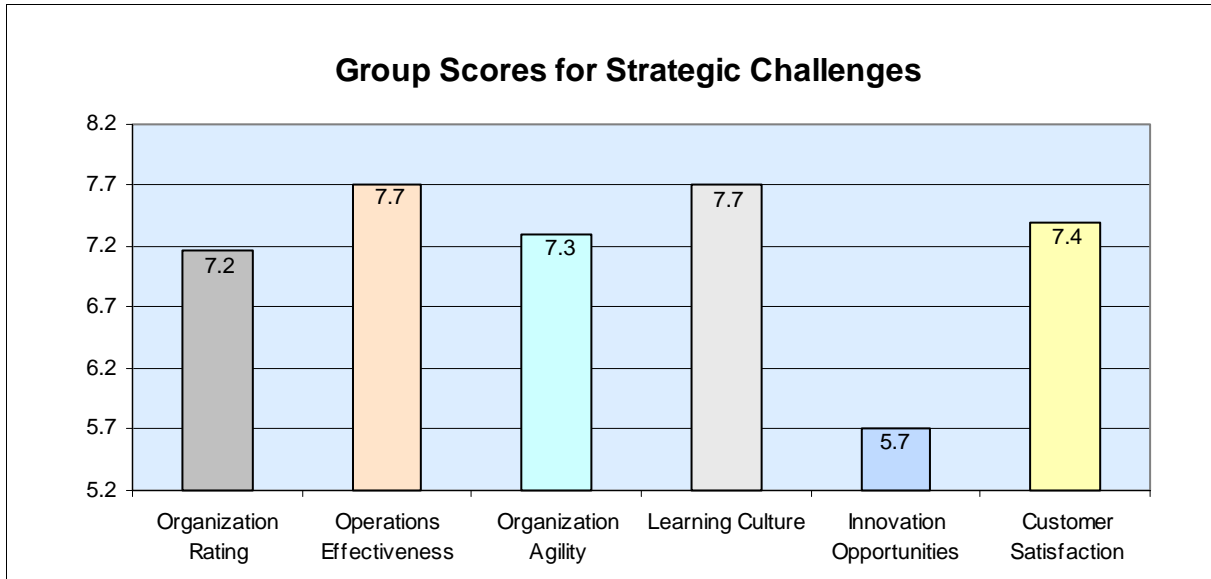
Time Perspective

		PRESENT	FUTURE												
F O C U S	I N W A R D	Operations Effectiveness Group Score: 7.7 Rank: 1 <table border="1" style="width: 100%; margin-top: 5px;"> <tr><td>Cost Management</td><td style="text-align: right;">6.9</td></tr> <tr><td>Time Utilization</td><td style="text-align: right;">8.5</td></tr> <tr><td>Quality Improvement</td><td style="text-align: right;">7.7</td></tr> </table>	Cost Management	6.9	Time Utilization	8.5	Quality Improvement	7.7	Organization Agility Group Score: 7.3 Rank: 4 <table border="1" style="width: 100%; margin-top: 5px;"> <tr><td>Rethinking Strategy</td><td style="text-align: right;">7.7</td></tr> <tr><td>Redesigning Structure</td><td style="text-align: right;">7.9</td></tr> <tr><td>Reengineering Processes</td><td style="text-align: right;">6.4</td></tr> </table>	Rethinking Strategy	7.7	Redesigning Structure	7.9	Reengineering Processes	6.4
	Cost Management	6.9													
Time Utilization	8.5														
Quality Improvement	7.7														
Rethinking Strategy	7.7														
Redesigning Structure	7.9														
Reengineering Processes	6.4														
O U T W A R D	Customer Satisfaction Group Score: 7.4 Rank: 3 <table border="1" style="width: 100%; margin-top: 5px;"> <tr><td>Customer Focus</td><td style="text-align: right;">7.4</td></tr> <tr><td>Customized Value</td><td style="text-align: right;">7.2</td></tr> <tr><td>Customer Partnering</td><td style="text-align: right;">7.6</td></tr> </table>	Customer Focus	7.4	Customized Value	7.2	Customer Partnering	7.6	Innovation Opportunities Group Score: 5.7 Rank: 5 <table border="1" style="width: 100%; margin-top: 5px;"> <tr><td>Prod./Serv. Development</td><td style="text-align: right;">5.3</td></tr> <tr><td>Market Foresight</td><td style="text-align: right;">5.2</td></tr> <tr><td>Knowledge Leverage</td><td style="text-align: right;">6.7</td></tr> </table>	Prod./Serv. Development	5.3	Market Foresight	5.2	Knowledge Leverage	6.7	
Customer Focus	7.4														
Customized Value	7.2														
Customer Partnering	7.6														
Prod./Serv. Development	5.3														
Market Foresight	5.2														
Knowledge Leverage	6.7														

Implementation

Learning Culture Rank: 1 <table border="1" style="width: 100%; margin-top: 5px;"> <tr><td>Employee Involvement</td><td style="text-align: right;">8.3</td></tr> <tr><td>Competence Development</td><td style="text-align: right;">7.9</td></tr> <tr><td>Teamwork Commitment</td><td style="text-align: right;">7</td></tr> </table>	Employee Involvement	8.3	Competence Development	7.9	Teamwork Commitment	7	Group Score: 7.7
Employee Involvement	8.3						
Competence Development	7.9						
Teamwork Commitment	7						

SECTION I - STRATEGIC CHALLENGES



SECTION II

ESSENTIAL CAPABILITIES MODULE

Guide

Fifteen Essential Capabilities, that determine an organization's ability to survive and succeed in the future, are defined in the framework model used in the Capability Snapshot (see "Understanding It"). The measurement of these Essential Capabilities creates a baseline from which to identify organization wide initiatives for improvement, and a guide for where improvement should be directed.

The first part of this report module contains a bar chart which displays your management group rating of each Capability ranked in descending order. This is followed by the two Organization Practices (derived from the two questions in the survey) that make up each Capability. These two grouped questions are displayed in the same rank order as are the Capabilities together with the average score each received.

The final page shows a line chart that displays the rating for each Capability by each respondent. In addition, there is a bar chart showing the average Capability rating of the group in the same order as in the line chart.

Points to consider

1. Although the scores are important, the ranking in the bar chart indicates the gaps the group perceives exist between the Capabilities. The greater the gap, the stronger the message. In addition, see whether the three Capabilities making up each Challenge are grouped together in the ranking or are widely separated. If the latter, look at the two questions making up each of the Capabilities under study. The nature of the questions (whether they are specific and pointed or soft and diffuse) can result in differences.
2. As with the Challenges, the highest ranked Capabilities could be considered strengths, while the lowest – weaknesses and the two Organization Practices making up the Capability should be considered in the same way.
3. Look at the average scores the two question related to the Capability received. Are they close together or widely separated? If the latter, is it due to the nature of the question (see 1 above)?
4. Also, as with the Challenges, the line chart comparing the individual ratings to the average highlight converging or diverging perspectives among the respondents. If the ratings of each are close together and their pattern is similar, the management group have a common view of the organization. Any divergences (either in the pattern or if one or more respondents is widely separated from the others) should be discussed and understood.

Questions to stimulate group discussion

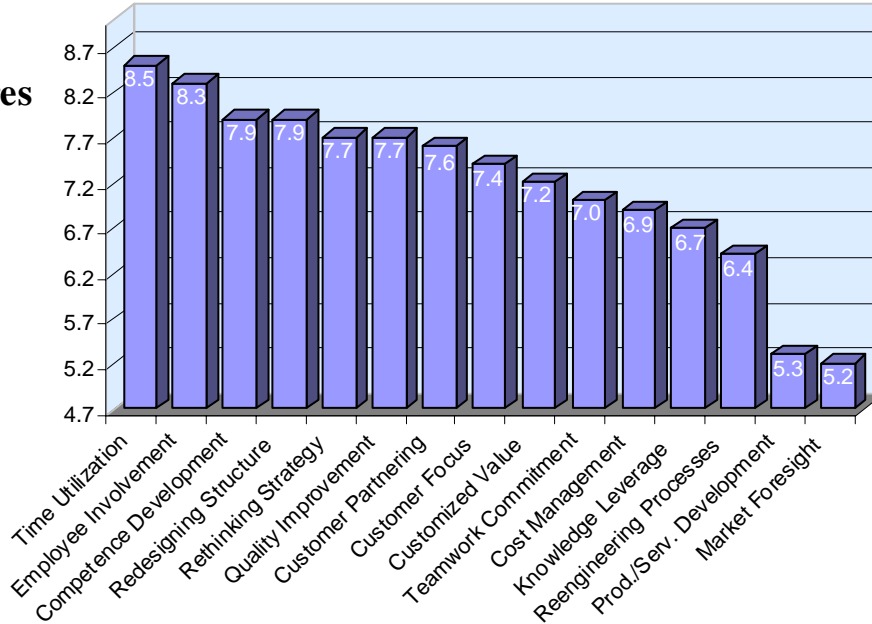
Discuss the ranking and ratings and understand the divergence of opinion.

Are their immediate initiatives that can be initiated to take advantage of the strengths they perceive, and improve upon the weaknesses.

Do one or more questions have divergent maximum and/or minimums. Is this important. Would other stakeholder categories (employees, customers, etc.) in the organization agree with these?

SECTION II - ESSENTIAL CAPABILITIES

Ranking of Group Scores of Essential Capabilities



TIME UTILIZATION

8.5

... is conscious of the value of time in satisfying customers?	8.6
... delivers complete orders in accordance with customer's time schedule?	8.4

EMPLOYEE INVOLVEMENT

8.3

... encourages all of its employees to be dedicated to the best interest of its customers?	9.0
... empowers the people dealing with customers to use their own judgment in responding to problems?	7.6

COMPETENCE DEVELOPMENT

7.9

... ensures that its people possess the knowledge and skills needed to do a good job?	8.6
... invests in attracting, training and developing the strongest talent?	7.2

REDESIGNING STRUCTURE

7.9

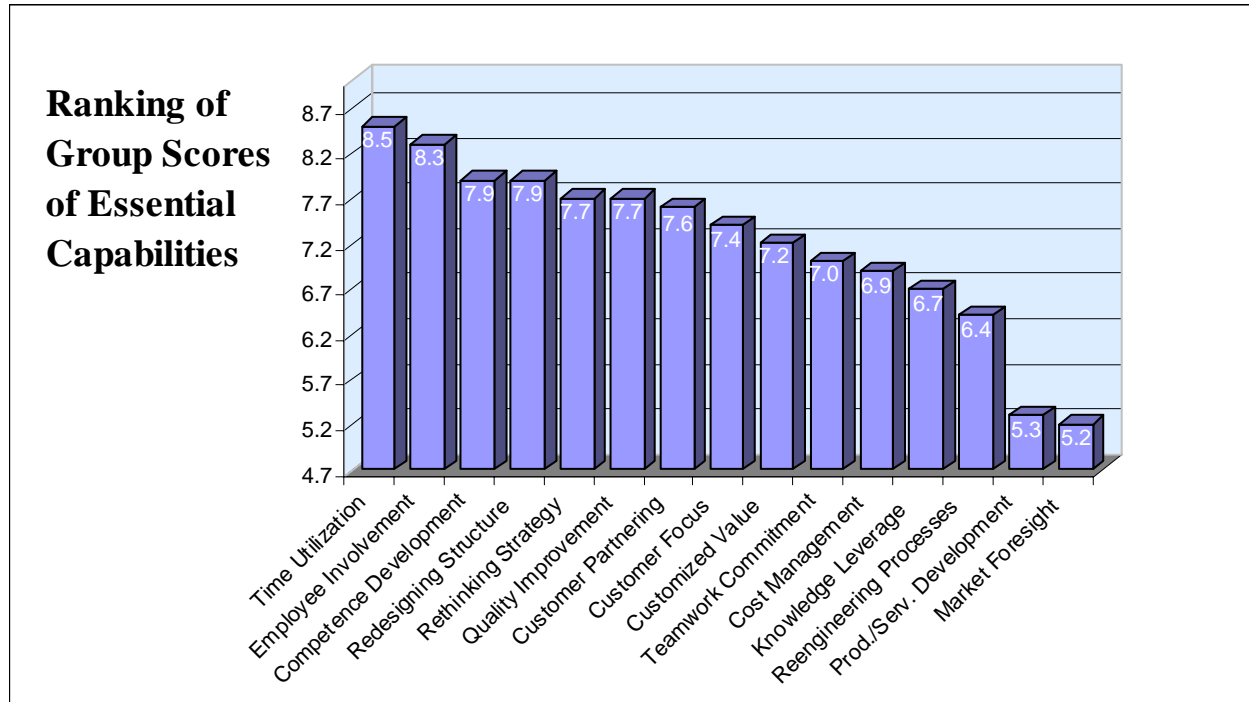
... maintains a flexible organization that can adapt to change?	8.2
... gives customers easy access to the right person(s) for taking care of their concerns?	7.6

QUALITY IMPROVEMENT

7.7

... delivers high-quality products that meet customer expectations?	7.8
... makes the quality of its service as important as the quality of its products?	7.6

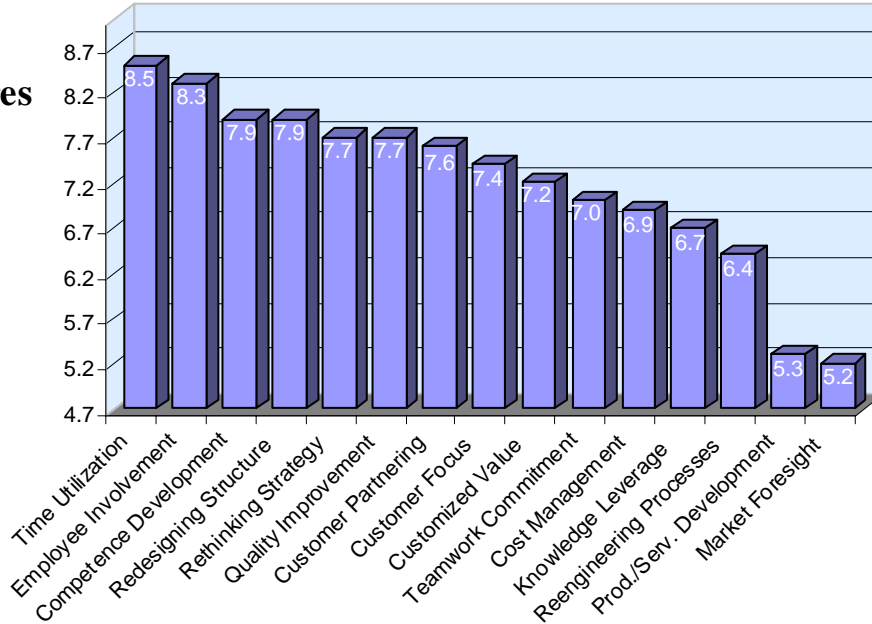
SECTION II - ESSENTIAL CAPABILITIES



RETHINKING STRATEGY		7.7
... communicates a clear statement of the principles and values of the company?		9.0
... focuses on products and services that differentiate it from the competition?		6.4
CUSTOMER PARTNERING		7.6
... builds close relationships with its clients based upon integrity and trust?		7.8
... helps its customers become better suppliers to their customers?		7.4
CUSTOMER FOCUS		7.4
... responds to customer requests and/or complaints in a constructive manner?		8.2
... listens carefully to customer suggestions and comments?		6.6
CUSTOMIZED VALUE		7.2
... shows special consideration for the particular needs of each customer?		7.6
... handles special, non-standard, non-routine requests from customers?		6.8
TEAMWORK COMMITMENT		7.0
... encourages teamwork as a way of doing things?		9.2
... invites customers to be part of task forces when solving problems?		4.8

SECTION II - ESSENTIAL CAPABILITIES

Ranking of Group Scores of Essential Capabilities



COST MANAGEMENT

6.9

... provides its customers with the best value for their money?

7.0

... keeps its own operating costs as low as possible?

6.8

KNOWLEDGE LEVERAGE

6.7

... seeks out the best way of doing things wherever they may be found and applies them?

7.2

... makes the best use of available knowledge, expertise and technology?

6.2

REENGINEERING PROCESSES

6.4

... streamlines its methods and procedures for servicing clients better?

7.0

... strives to integrate its information systems with those of its customers and its suppliers?

5.8

PROD./SERV. DEVELOPMENT

5.3

... is creative and innovative in the products it provides?

6.6

... asks for and uses customer ideas in adding new features to current products or in developing new products?

4.0

MARKET FORESIGHT

5.2

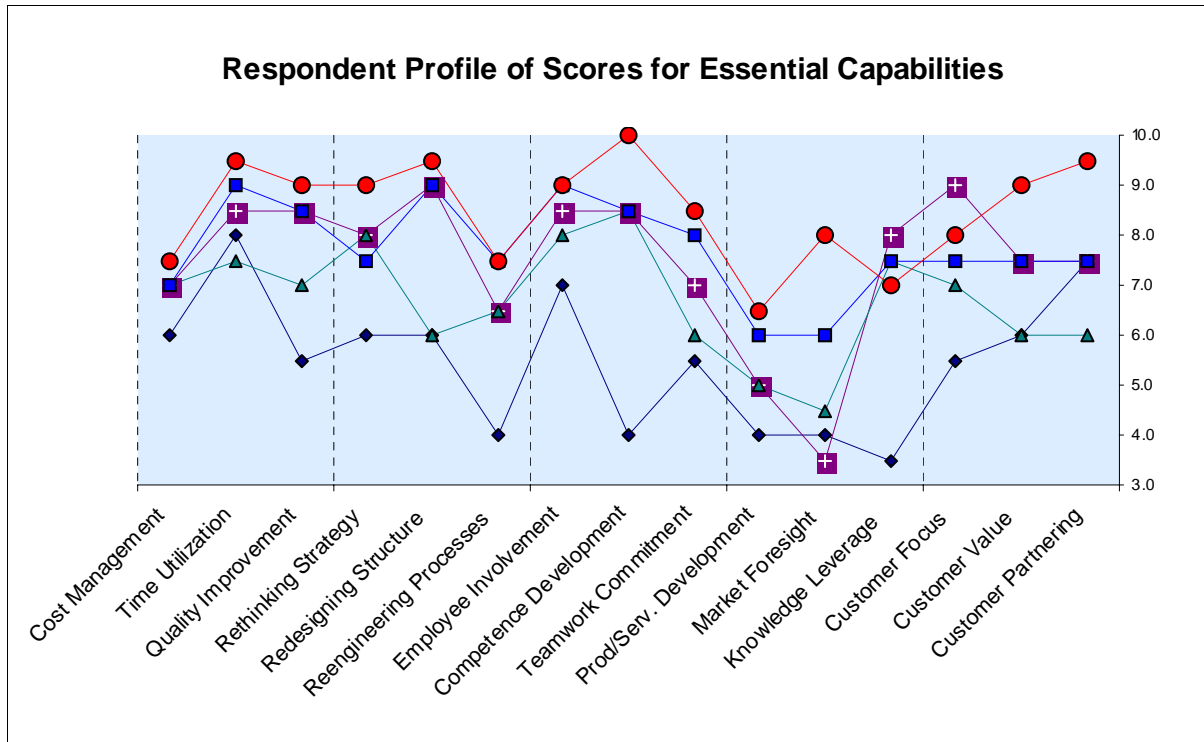
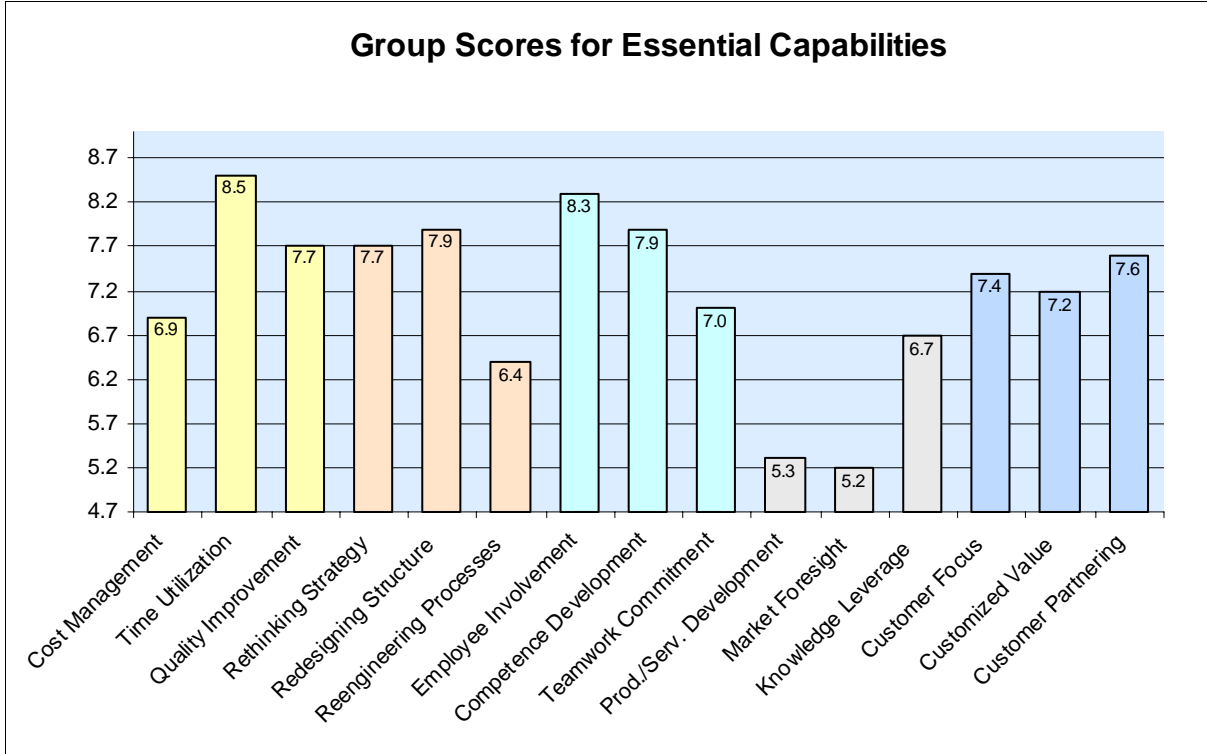
... anticipates emerging market trends and changing customer expectations?

5.6

... anticipates the future needs of customers ahead of customer requests for specific products or services?

4.8

SECTION II - ESSENTIAL CAPABILITIES



SECTION III ORGANIZATION PRACTICES MODULE Guide

In order to quantify the Essential Capabilities that determine an organization's ability to survive and succeed in the future, the Management Snapshot (based on the Capability Snapshot) poses a series of structured questions on each of the Essential Capabilities that represent organization practices and programs of the industry type that best matches your organization.

Note that the comprehensive Capability Snapshot would use questions customized to your organization's practices and programs.

This report module contains the average scores of the responses to the each of the questions together with the maximum and minimum score. These questions representing your Organization Practices are displayed in descending rank order of the average score.

Points to consider

1. This display represents the group perception of the strongest and weakest practices of your organization represented by the questions.
2. Also look at the maximum and minimum scores for each question. Are they close to the average or widely separated? If the former, there is more consensus and the validity of the rank of the practice is reinforced. If the latter, the reason for the divergence should be understood.

Questions to stimulate group discussion

Does the group agree with this ranking? Why are there differences in opinion?
Are their immediate initiatives to take advantage of the strengths, and improve upon the weaknesses.

SECTION III -ORGANIZATION PRACTICES

In your opinion, to what extent do you see HALO SERVICE as an organization that...

ORGANIZATION - PRACTICES RATINGS:	High	Low	AVG
... encourages teamwork as a way of doing things? <i>CAPABILITY - Teamwork Commitment</i>	10	8	9.2
... communicates a clear statement of the principles and values of the company? <i>CAPABILITY - Rethinking Strategy</i>	10	6	9.0
... encourages all of its employees to be dedicated to the best interest of its customers? <i>CAPABILITY - Employee Involvement</i>	10	7	9.0
... is conscious of the value of time in satisfying customers? <i>CAPABILITY - Time Utilization</i>	10	8	8.6
... ensures that its people possess the knowledge and skills needed to do a good job? <i>CAPABILITY - Competence Development</i>	10	6	8.6
... delivers complete orders in accordance with customer's time schedule? <i>CAPABILITY - Time Utilization</i>	9	7	8.4
... responds to customer requests and/or complaints in a constructive manner? <i>CAPABILITY - Customer Focus</i>	9	7	8.2
... maintains a flexible organization that can adapt to change? <i>CAPABILITY - Redesigning Structure</i>	10	6	8.2
... builds close relationships with its clients based upon integrity and trust? <i>CAPABILITY - Customer Partnering</i>	9	6	7.8
... delivers high-quality products that meet customer expectations? <i>CAPABILITY - Quality Improvement</i>	9	6	7.8
... shows special consideration for the particular needs of each customer? <i>CAPABILITY - Customized Value</i>	9	6	7.6

SECTION III -ORGANIZATION PRACTICES

In your opinion, to what extent do you see HALO SERVICE as an organization that...

ORGANIZATION - PRACTICES RATINGS:	High	Low	AVG
... makes the quality of its service as important as the quality of its products? <i>CAPABILITY - Quality Improvement</i>	9	5	7.6
... empowers the people dealing with customers to use their own judgment in responding to problems? <i>CAPABILITY - Employee Involvement</i>	8	7	7.6
... gives customers easy access to the right person(s) for taking care of their concerns? <i>CAPABILITY - Redesigning Structure</i>	9	5	7.6
... helps its customers become better suppliers to their customers? <i>CAPABILITY - Customer Partnering</i>	10	6	7.4
... invests in attracting, training and developing the strongest talent? <i>CAPABILITY - Competence Development</i>	10	2	7.2
... seeks out the best way of doing things wherever they may be found and applies them? <i>CAPABILITY - Knowledge Leverage</i>	9	3	7.2
... provides its customers with the best value for their money? <i>CAPABILITY - Cost Management</i>	9	5	7.0
... streamlines its methods and procedures for servicing clients better? <i>CAPABILITY - Reengineering Processes</i>	9	5	7.0
... keeps its own operating costs as low as possible? <i>CAPABILITY - Cost Management</i>	8	5	6.8
... handles special, non-standard, non-routine requests from customers? <i>CAPABILITY - Customized Value</i>	9	5	6.8
... is creative and innovative in the products it provides? <i>CAPABILITY - Prod./Serv. Development</i>	8	6	6.6

SECTION III -ORGANIZATION PRACTICES

In your opinion, to what extent do you see HALO SERVICE as an organization that...

ORGANIZATION - PRACTICES RATINGS:	High	Low	AVG
... listens carefully to customer suggestions and comments? <i>CAPABILITY - Customer Focus</i>	9	4	6.6
... focuses on products and services that differentiate it from the competition? <i>CAPABILITY - Rethinking Strategy</i>	8	6	6.4
... makes the best use of available knowledge, expertise and technology? <i>CAPABILITY - Knowledge Leverage</i>	8	4	6.2
... strives to integrate its information systems with those of its customers and its suppliers? <i>CAPABILITY - Reengineering Processes</i>	8	3	5.8
... anticipates emerging market trends and changing customer expectations? <i>CAPABILITY - Market Foresight</i>	7	4	5.6
... invites customers to be part of task forces when solving problems? <i>CAPABILITY - Teamwork Commitment</i>	8	2	4.8
... anticipates the future needs of customers ahead of customer requests for specific products or services? <i>CAPABILITY - Market Foresight</i>	9	3	4.8
... asks for and uses customer ideas in adding new features to current products or in developing new products? <i>CAPABILITY - Prod./Serv. Development</i>	5	2	4.0

SECTION IV HALO INDEX Guide

The Capability Snapshot is designed to develop Higher-performing, Agile, Learning Organizations (**HALO**).

A Higher-performing organization seeks continuous improvement.

An Agile one seeks continuous adaptation to change.

A Learning Organization seeks continuous development.

The group rating of your organization as a HALO is indicated on the next page. In addition, this Organization Rating is compared to the ratings given by the last 40 Management groups to their organization. The names of these organizations have been replaced by the name of the industry to which they belong.

The Organization Rating or Halo Index is the average of the group Challenge ratings and is a single number that summarizes your group's overall perception of your organization.

Points to consider

1. Organizations, especially those in the for-profit sector, do not all operate in the same competitive environment. Because of this, internal respondents (management and employees) may more or less critical. Consequently, it is best to compare your Halo Index with those organizations in industries similar to yours.
2. The Halo Index or Organization Rating for your group was compared to the rating by each respondent in the Challenges Module (page 4). The Organization Rating is reinforced if these individual responses are closely aligned. Significant divergences may be an indication internal disagreement.

Questions to stimulate group discussion

Does the group believe that the rating is indicative of the organization's position?

Ideally where would the group like the HALO rating to be?

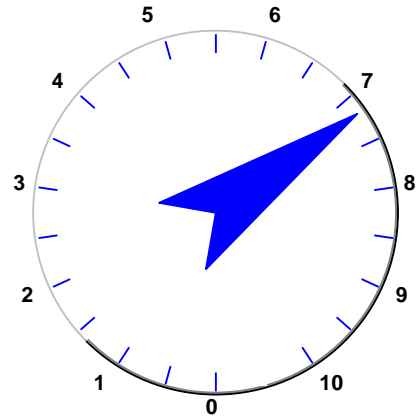
Discuss the divergence of the ratings, if significant, and try to identify why.

SECTION IV - HALO INDEX

The overall evaluation of your organization by your management group participating in this survey is summarized by the HALO INDEX:

The HALO INDEX indicates the current status of the organization in relation to becoming a Higher performing, Agile, Learning Organization.

Your HALO index based on management's perspective is 7.2



Comparison with other organizations

	RANK	TYPE OF ORGANIZATION(SIC CODE DIV.)	SAMPLE SIZE	HALO INDEX
First Quartile	1	AGRICULTURE & FORESTRY	5	8.4
	2	FINANCE & REAL ESTATE	7	7.3
	3	CONSTRUCTION	14	7.2
	4	SERVICES	12	7.0
	4	MANUFACTURING	35	7.0
	4	SERVICES	5	7.0
	7	TRANSPORTATION	5	6.8
	8	SERVICES	6	6.7
	9	SERVICES	12	6.5
Second Quartile	9	MANUFACTURING	5	6.5
	11	SERVICES	5	6.4
	11	TRANSPORTATION	9	6.4
	13	TRANSPORTATION	28	6.2
	14	MANUFACTURING	5	6.1
	14	MANUFACTURING	6	6.1
	16	SERVICES	6	6.0
	17	GOVERNMENTS	44	5.9
	17	MANUFACTURING	24	5.9
Third Quartile	19	FINANCE & REAL ESTATE	6	5.8
	20	SERVICES	10	5.7
	20	FINANCE & REAL ESTATE	10	5.7
	20	MANUFACTURING	14	5.7
	20	SERVICES	6	5.7
	20	CONSTRUCTION	13	5.7
	25	MANUFACTURING	34	5.6
	25	WHOLESALE TRADE	9	5.6
	25	INTERNAL DEPARTMENTS	15	5.6
Fourth Quartile	28	SERVICES	21	5.5
	28	MANUFACTURING	25	5.5
	30	WHOLESALE TRADE	13	5.4
	31	GOVERNMENTS	45	5.3
	32	SERVICES	5	5.2
	32	MANUFACTURING	6	5.2
	34	MANUFACTURING	11	5.1
	35	INTERNAL DEPARTMENTS	16	5.0
	36	WHOLESALE TRADE	10	4.9
	37	WHOLESALE TRADE	21	4.8
	38	GOVERNMENTS	5	4.3
39	WHOLESALE TRADE	6	4.2	
40	MANUFACTURING	10	3.8	

Your group score 7.2

THE NEXT STEP: THE COMPREHENSIVE CAPABILITY SNAPSHOT

The Management Snapshot evaluates an organization from the perspective of the management group. However, the real power of a comprehensive Capability Snapshot comes from an expanded questionnaire, customized for your organization, and the comparison of three other stakeholder perspectives (customers, employees, suppliers, boards of directors, etc.) with those of management. In addition, these stakeholder categories can be subdivided into different sub-groups. The comparison of the perceptions of these multiple categories, and their related sub-groups, is a key to the power of the Capability Snapshot.

The Capability Snapshot includes either online or telephone interviews with customized open-ended questions for all external categories. Management and employee groups may be surveyed online or by using paper and pencil kits.

The feedback reports are more extensive than those of the Management Snapshot. The power of these results and subsequent sensemaking is significantly increased by comparing similarities and differences both within each category and between categories. The perspectives of the organization's strengths and weaknesses, its strategic orientation, and its HALO rating, by each category and by the sub-groupings contribute to a complete understanding of the organization.

In addition, the reports:

- provide you with a rating of how each customer surveyed values your organization. They identify the level of their loyalty so that you can take immediate action to improve relations with dissatisfied ones, and improve value to all customers.
- let you listen to customers. From the feedback of the open-ended questions, your customers let you know what they like and dislike about the organization, and what you can do to improve.
- allow you the opportunity to listen to your Network of suppliers and/or other external groups that know your organization.
- tell you how your customers compare you to competitors who they deal with. This optional service identifies opportunities and threats to gain competitive advantage by knowing how your customers rate your competitor's strengths and weaknesses. This alone is worth the price of a Capability Snapshot.
- sets a baseline both from which to monitor change, benchmark best practices between departments, and/or divisions, and/or other organizations.

The full Capability Snapshot is the ideal resource to help create a higher-performing, leading-edge organization.

If you would like more information contact us at:

1-800-933-7627 or www.capsnap.com

E-mail – csi@capsnap.com