



# Organizational Development

A Teamwide 5 Disciplines Assessment

Report For:

Date: **8/28/2024**

Participants: **16**

YOUR COMPANY

**LOGO**

APPEARS HERE

## Organizational Development Report Contents

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## Introduction to Organizational Development

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Every CEO, business owner, entrepreneur and business leader wants a great business. Having a great business is a grand aspiration, but also vague. So, how do you define a great business?

A great business is one that is achieving ultimate, optimal success by being sustainable, predictable, stable, consistent and has an emotional connection. To put it more simply, we define a great business as one that is "**Adding Zeros.**"

Adding Zeros is thinking, focusing on, and achieving exponential growth. Most businesses think about a % growth each year. Exponential growth is thinking in multiples, 10x growth vs. 10% growth. 30x growth vs. 30% growth.

Where do we want to Add Zeros or achieve exponential growth? Bottom line...In every aspect of the business – revenue, margin, profit, customer acquisition, customer retention, employee engagement, employee retention, and community involvement.

When you hear about success of a great business, what do we hear most? Revenue and profit. Every business must have these two to survive, but without customer engagement, employee engagement, and community involvement, our belief is that they are not yet a great business.

In order to add zeros, we must focus on the actions or disciplines that create exponential growth. From working with thousands of organizations of all sizes, we have categorized the focus to '**5 Disciplines of Exponential Growth.**'

Before I share them, I want to reinforce our definition of Adding Zeros. It is a business that is sustainable, predictable, stable, consistent, and has an emotional connection.

In order to be *sustainable*, we must have a clear Strategy. Strategy is discipline #1. A clear strategy defines how we will win. Winning isn't about today's margin, profit, or revenue. Winning is about outlasting your competition and the business outlasting you. A clear business model has leverage, scalability, and marketability on an opportunity that fills a demand or need. Everyone in your business should be able to state your strategy in a clear concise phrase or sentence.

A great business is sustainable which comes from having a clear strategy, our 1st discipline.

The 2nd discipline helps us achieve *predictability*. Predictability is the result of having outstanding Business Development and forecasting the future by using and

understanding our actionable numbers. No business can survive long term with roller coaster sales. Business development is about having marketing with differentiation, that attracts a specific audience that will buy our product and service over and over again. Business development includes having a clear sales process that can be duplicated and used to convert that specific audience into customers. The third piece of business development is customer service. I stated we want to attract an audience that will buy our product or service over and over again. If we do not service them well they won't be returning. Understanding and improving our actionable numbers give us strong business development.

The 2nd discipline is business development, creating predictability.

The 3rd discipline is focusing on People, which brings *stability*. Stability is having high employee retention, high employee engagement, and we are continuously developing our team. Great companies have both management and leadership. Stability with our people happens with leadership. Leadership creates passion and focus with team members. Leadership is about action not about position. Leadership focuses on talent development. Every person in every organization should be learning and growing not just in their technical skills but also in their interpersonal skills. When our team grows, the business grows. A major piece of stability is recruitment. Having the right people on the team is critical for stability. We must know how to attract and retain the right skills, behaviors, and team members.

Stability comes from focusing on our people, our 3rd discipline.

Discipline number 4 is Execution. Every great business has execution that is consistent. No matter who a customer interacts with they should receive consistent messages. By implementing and following proven processes and routines as an organization we become consistent in the eyes of our customers and our co-workers. I mentioned great companies have both management and leadership. Great execution comes from great management. We manage processes and lead people. Another piece of execution is financial controls. When we manage our processes, our financials will fall into line and continue to improve our efficiencies.

Execution, our 4th discipline is all about being consistent.

Our 5th discipline creates an *emotional connection* with our organization. Our 5th discipline is Mission. Let me tell you what I am not referring to. I am not referring to a future mission statement. I am referring to what we are doing to improve the world we live in today. What are our values? Values are defined as how we treat each other, treat our customers, and how we make decisions. These core values must be behaviorally

based so everyone knows how to act every single day. Our purpose – why are we in business? Every organization needs to define in a very simple sentence why we do what we do every day. This should provide a clear emotional connection to everyone within the business. The purpose of your business should be so powerful that it inspires everyone to do their best every single day. The last piece of mission is giving back to our community and the world in which we do business. It is our duty to help our communities grow and thrive. It is our duty as business leaders to support and invest in the future of where we do business. When we are fulfilling the discipline of mission everyone is emotionally connected to the company, our values, our purpose and our future.

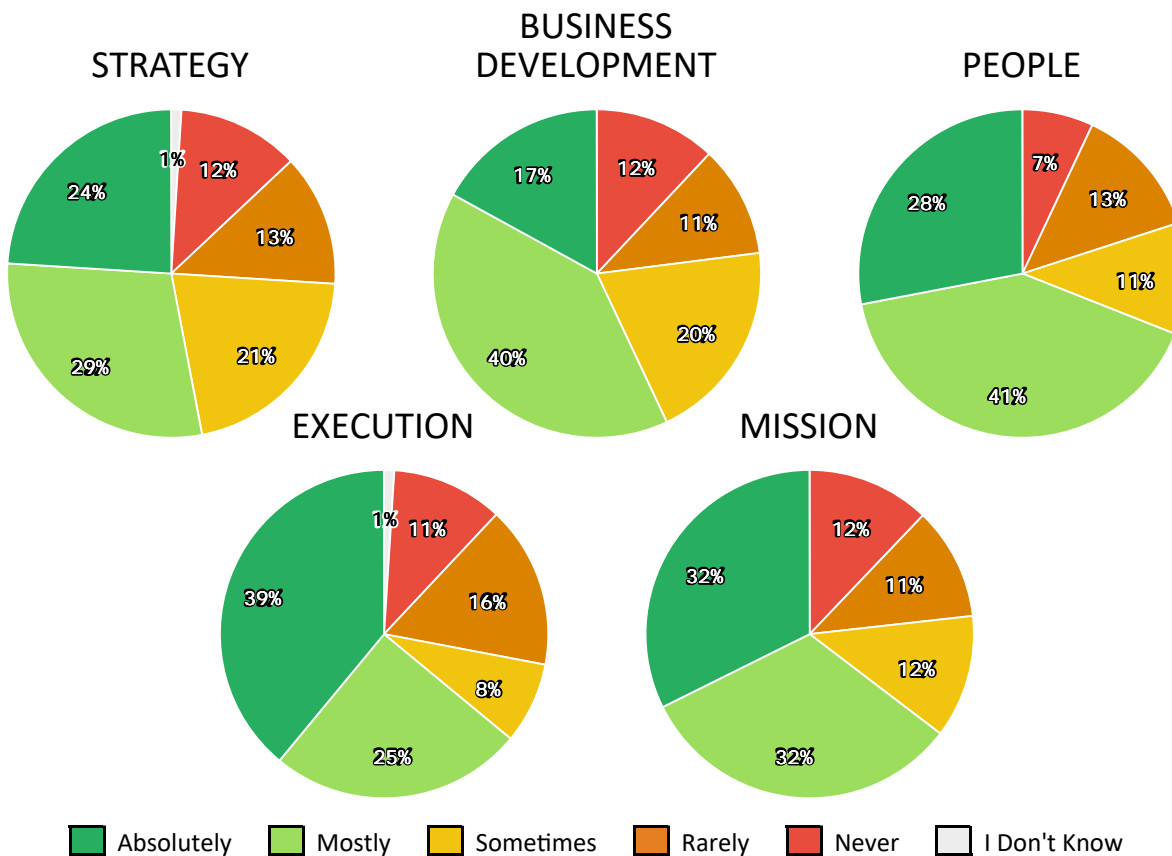
**Adding Zeros** through 5 Disciplines of Exponential Growth; Strategy, Business Development, People, Execution and Mission. When all five are running well we add zeros. If 1 or more is low on air or flat, we are not reaching our potential nor will we grow exponentially.

To grow exponentially your organization must be *sustainable, predictable, stable, consistent, and emotionally connected*.

Are you adding zeros or are you adding zero?



## Discipline Summary



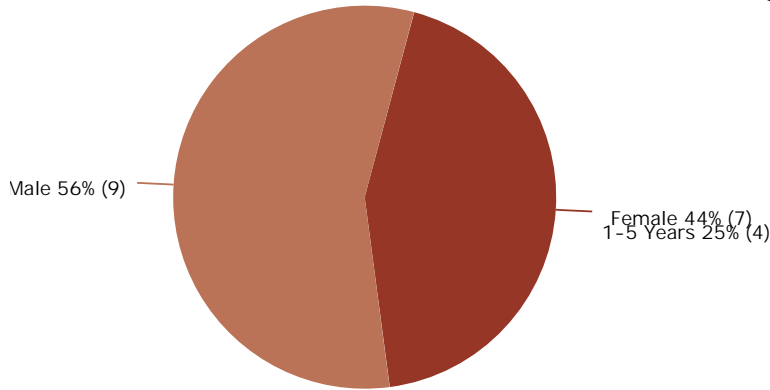
### SUMMARY

STRATEGY	53%
BUSINESS DEVELOPMENT	57%
PEOPLE	69%
EXECUTION	64%
MISSION	64%
<b>TOTAL</b>	<b>61%</b>

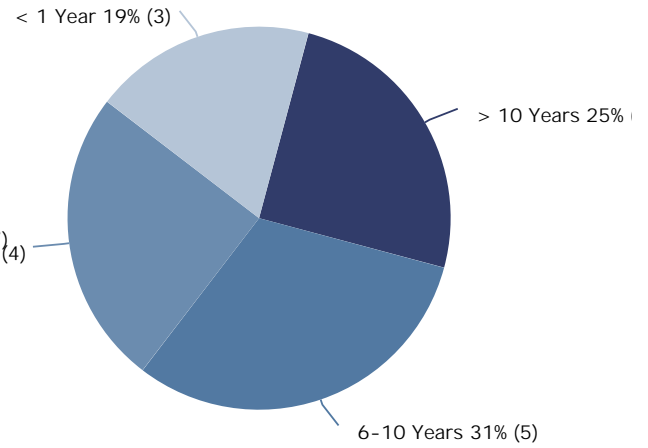
\*The total summary number is calculated by adding absolutely and mostly together

## Demographic Summary

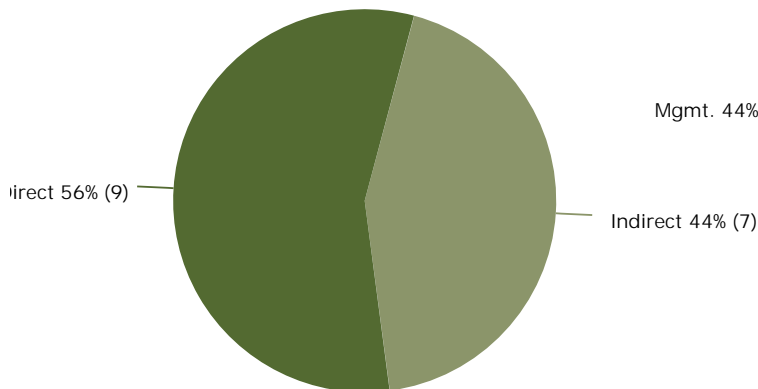
GENDER



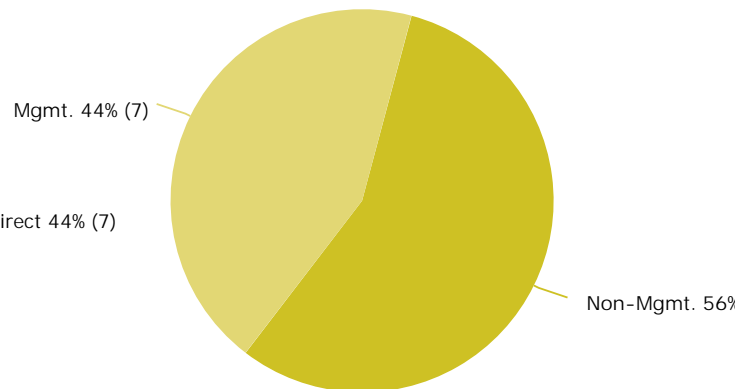
TENURE



LEVEL OF CUSTOMER INTERACTION



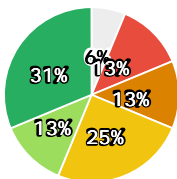
ROLE



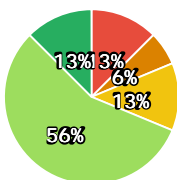
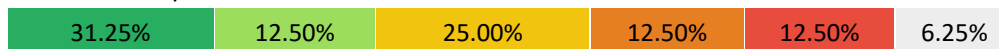
Total Responses Received: 16

## Strategy Discipline

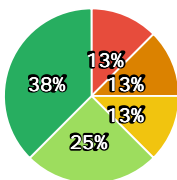
Breakdown	Absolutely	Mostly	Sometimes	Rarely	Never	IDK
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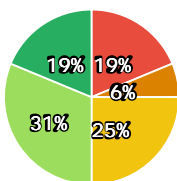
1. 100% of our management and our entire team can clearly articulate our strategic direction and plan.



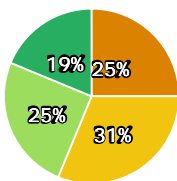
2. There is absolute clarity about our organizational priorities. And everyone knows how they support the priorities.



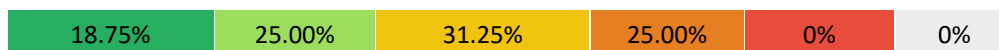
3. We spend more time being proactive towards our goals vs reactive.



4. We have identified and committed to long term goals and annual goals that support our future.



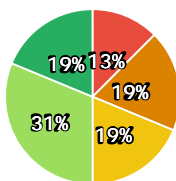
5. Our company is positioned for long term sustainability because of the opportunity in the market that we fill.





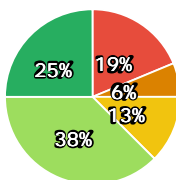
## Strategy Discipline

Breakdown	Absolutely	Mostly	Sometimes	Rarely	Never	IDK
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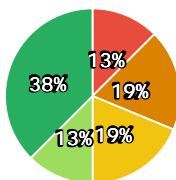
6. Our products and services are structured for making a sale once and getting paid long term. (the customer needs to come back again and again)

18.75%	31.25%	18.75%	18.75%	12.50%	0%
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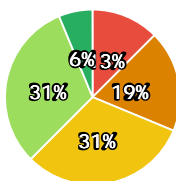
7. We have scalability because future sales cost less and are easier to capture.

25.00%	37.50%	12.50%	6.25%	18.75%	0%
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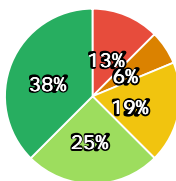
8. We know exactly what business we are in.

37.50%	12.50%	18.75%	18.75%	12.50%	0%
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9. We are selling what people want to buy and are very marketable to our target audience.

6.25%	31.25%	31.25%	18.75%	12.50%	0%
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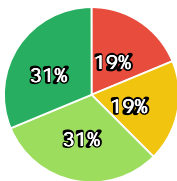


10. Our team thinks big picture and in a mindset of abundance.

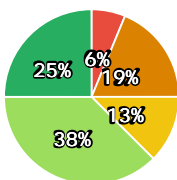
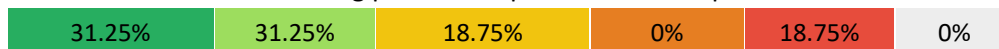
37.50%	25.00%	18.75%	6.25%	12.50%	0%
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## Business Development Discipline

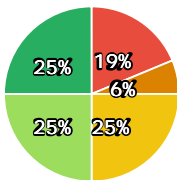
Breakdown	Absolutely	Mostly	Sometimes	Rarely	Never	IDK
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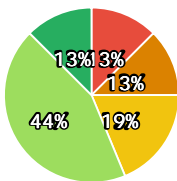
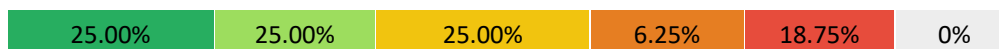
11. We have a clear marketing plan to out-perform our competition.



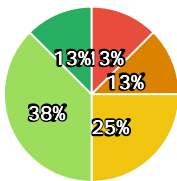
12. We have a clear sales process and all sales people maximize it.



13. We consistently provide training and development for all team members who interact with our customers.



14. We measure customer loyalty and it is consistently improving.

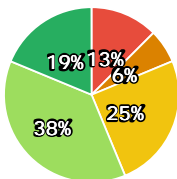


15. Our target market is absolutely clear and our marketing efforts attract them.

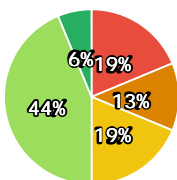
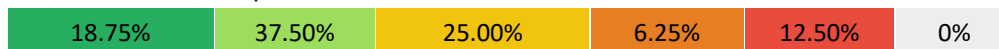


## Business Development Discipline

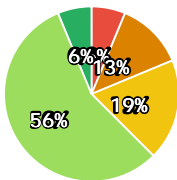
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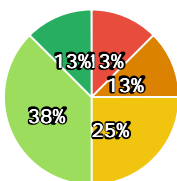
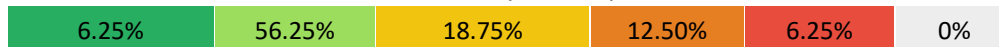
16. At a minimum we measure lead generation, conversion rate, and average dollar sale, and strive to improve each one.



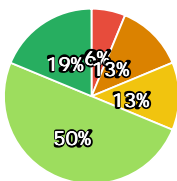
17. We have clear customer service standards and everyone who interacts with customers lives by those standards.



18. We sell on value and service, and rarely sell on price.



19. Our business has future predictability because of our consistency in business development.

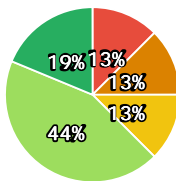


20. We are creative and fun in attracting and servicing our customers.

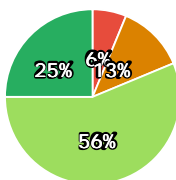
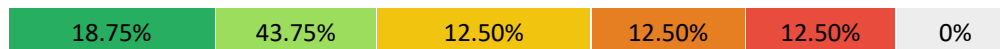


## People Discipline

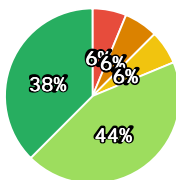
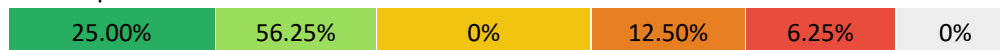
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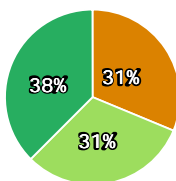
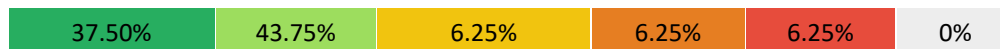
21. We have a clear process to identify, retain, and/or develop future high potential leaders.



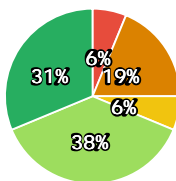
22. Empowerment and involvement throughout the company is strong and higher than expectations.



23. We have a clear process for recruitment, hiring, and inducting the best new team members.



24. All employees have a personal development plan.

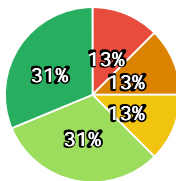


25. We have an effective process for dealing with poor performers.

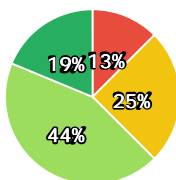
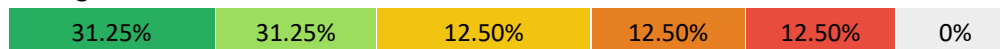


## People Discipline

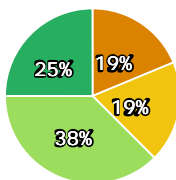
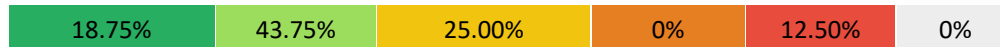
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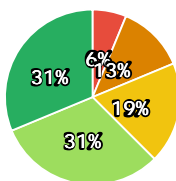
26. We have a training curriculum that teaches key leadership skills for our management team.



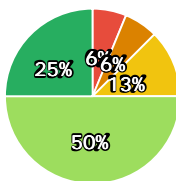
27. We have the right leaders in place to be successful over the next five years.



28. We have a training curriculum that creates great team members at all levels of the organization. (hard and soft skills)



29. We believe that 1 great person is more effective than 2 average team members.

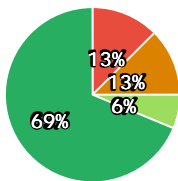


30. We hire slow and fire fast.

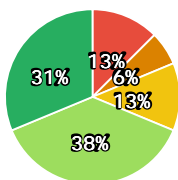
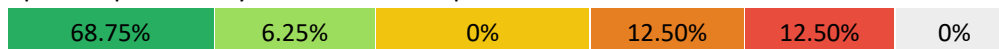


## Execution Discipline

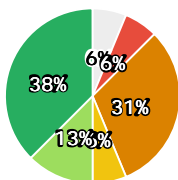
Breakdown	Absolutely	Mostly	Sometimes	Rarely	Never	IDK
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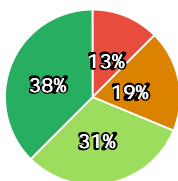
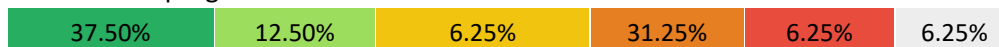
31. All of the company's major processes are written down, trained on, followed and updated periodically for continued improvement.



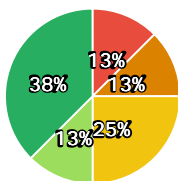
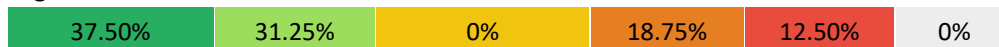
32. Every position in every department has Key Performance Indicators to measure progress and success.



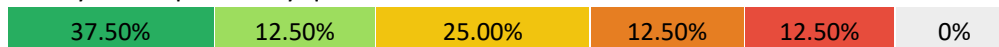
33. We have a visual dashboard of key performance indicators (KPIs) that accurately measure our progress.



34. We have well executed communication habits throughout the entire organization.

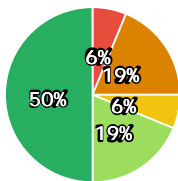


35. 100% of our department managers and management team members have a 90-day action plan every quarter.

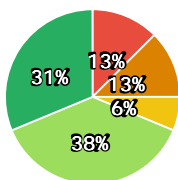
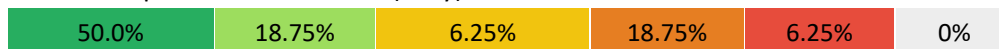


## Execution Discipline

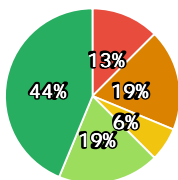
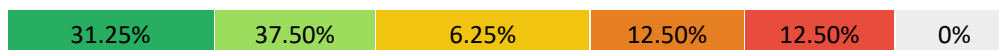
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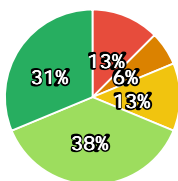
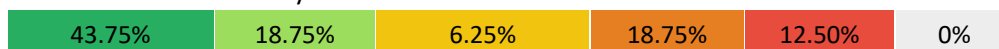
36. We are productive vs. active (busy).



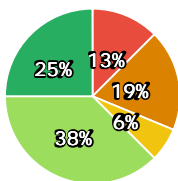
37. We have a culture of peer accountability and follow through. All team members count on each other and trust one another.



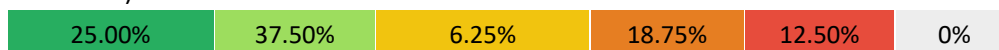
38. We have clear financial goals, budgets, forecasts for the future and processes that are reviewed weekly.



39. Every team member understands how they influence cash flow, revenue and profit.

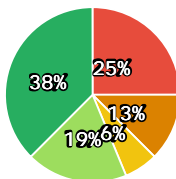


40. We are constantly improving the actions that create our results. (vs. just focusing on results)

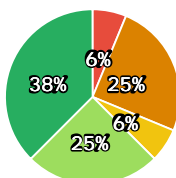
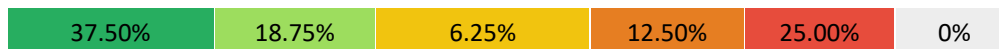


## Mission Discipline

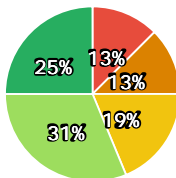
Breakdown	Absolutely	Mostly	Sometimes	Rarely	Never	IDK
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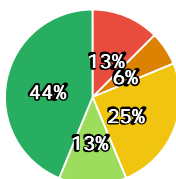
41. Our purpose is an emotional connector for our employees and has a clear impact on the world.



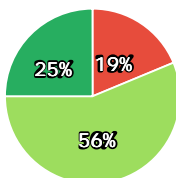
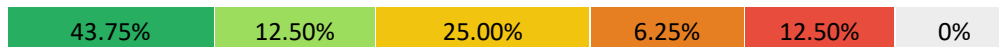
42. Our core values are clearly defined, documented and known by all team members, used to hire, develop, and redeploy our team.



43. Employee engagement is at an all time high.



44. The business direction for the future is clear and motivating to every team member.



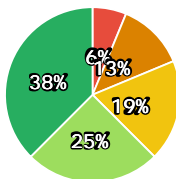
45. We make a positive difference in the lives of our employees, our community and the world we live in.



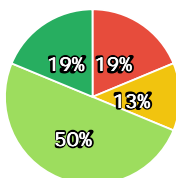


## Mission Discipline

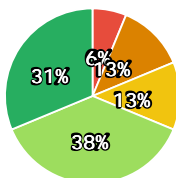
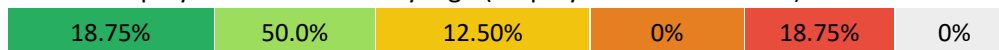
Breakdown	Absolutely	Mostly	Sometimes	Rarely	Never	IDK
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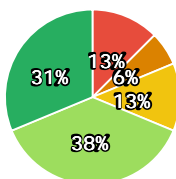
46. Our team members are here for a career vs. a job.



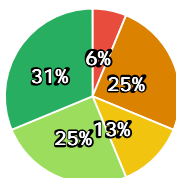
47. Our employee retention is very high (employee turnover is low).



48. All team members have a sense of pride about our organization in how we represent ourselves and talk with others.



49. Our organization gives time and financial donations to our community to help those less fortunate.



50. We have an environment of energy and excitement for the future.

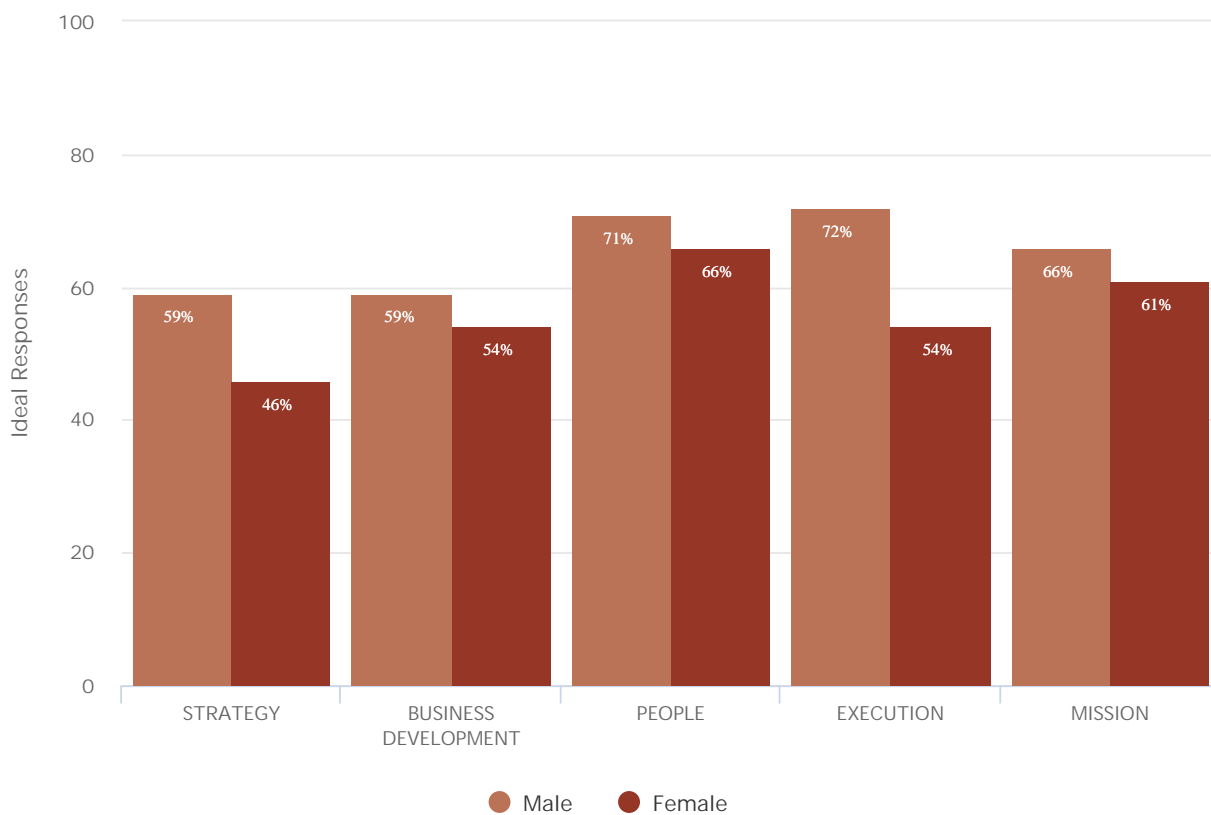
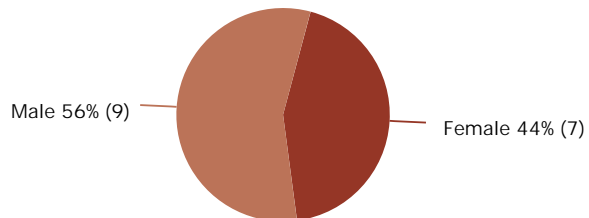


## Summary by Discipline and Gender

### CALCULATION SUMMARY

Percentages below represent the summary by Gender.

### GENDER

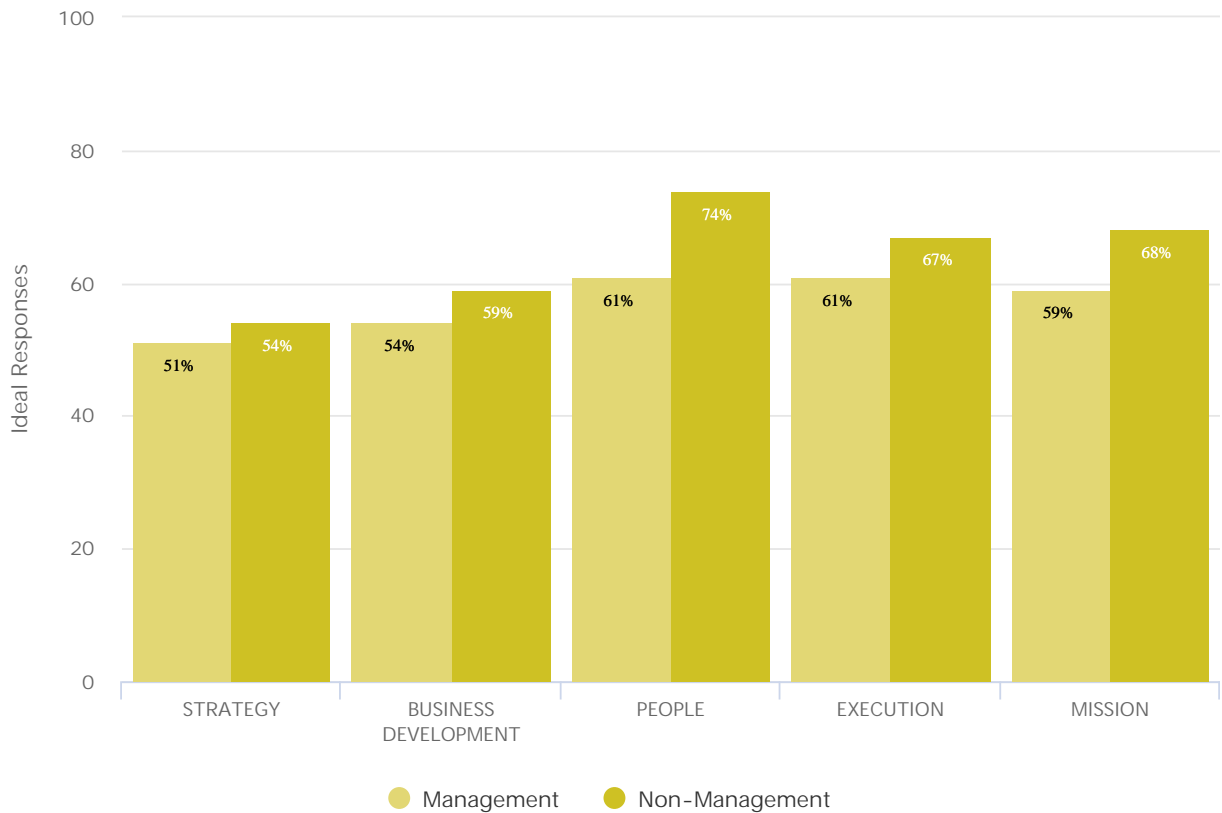
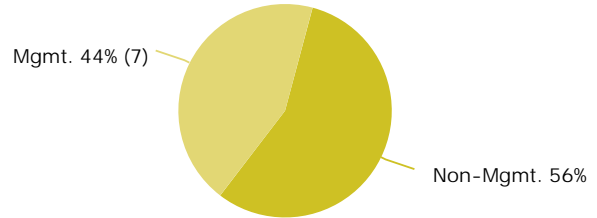


## Summary by Discipline and Role

### CALCULATION SUMMARY

Percentages below represent the summary by Role.

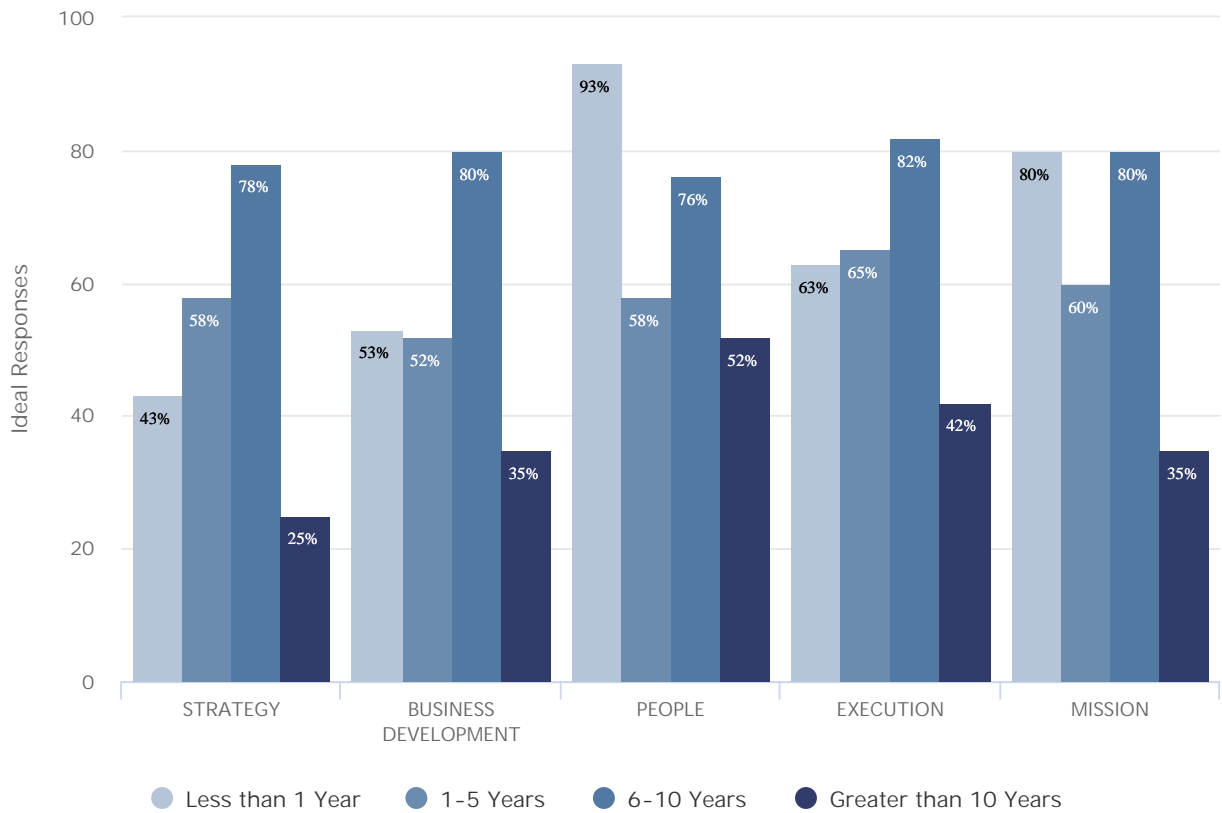
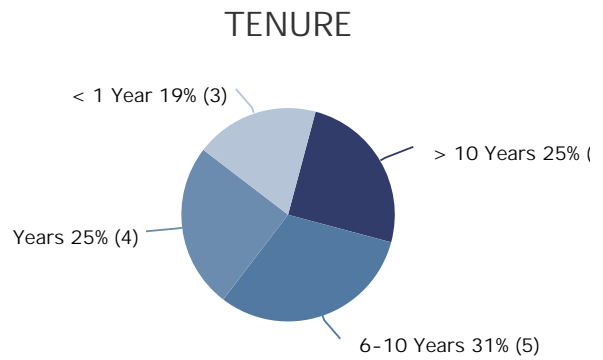
### ROLE



## Summary by Discipline and Tenure

### CALCULATION SUMMARY

Percentages below represent the summary by Tenure.

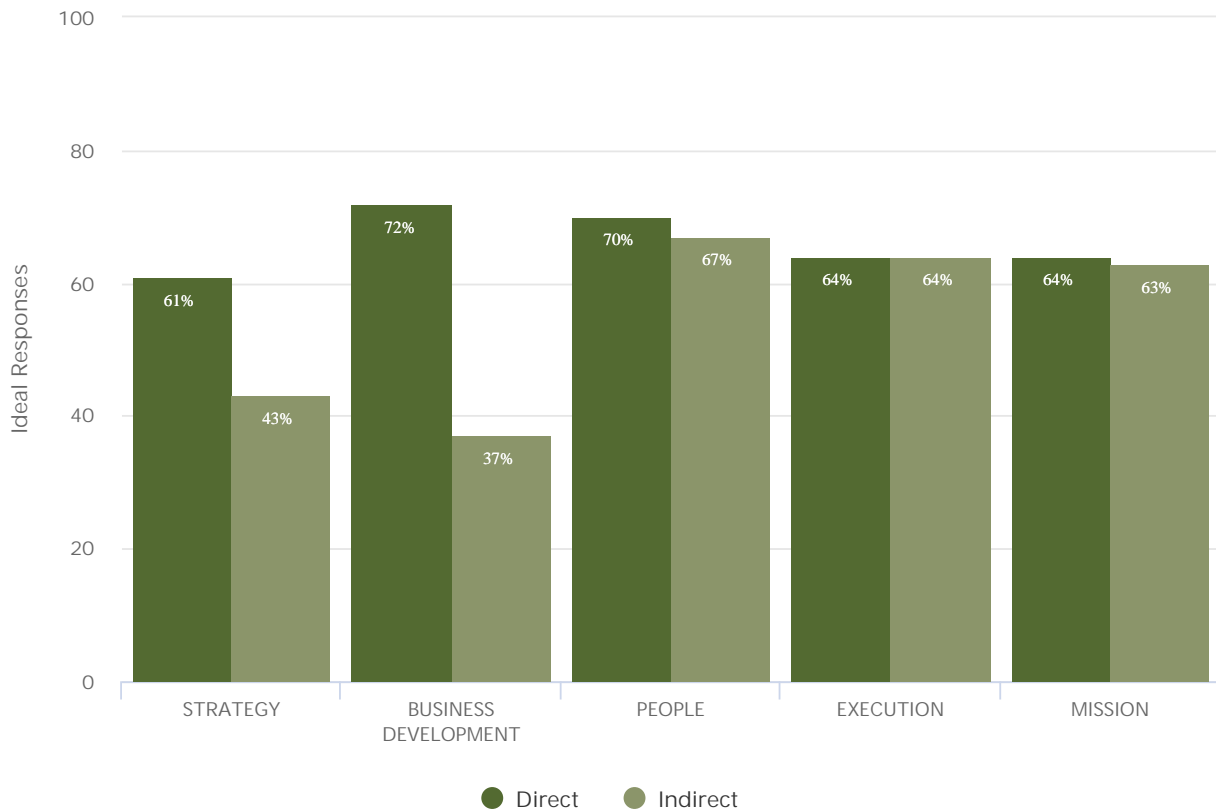
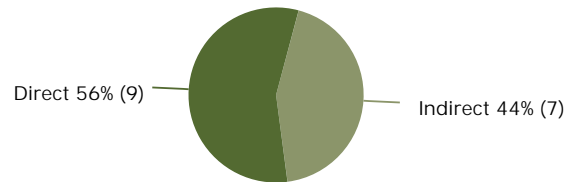


## Summary by Discipline and Level of Customer Interaction

### CALCULATION SUMMARY

Percentages below represent the summary by Level of Customer Interaction.

### LEVEL OF CUSTOMER INTERACTION



## Performance Strengths & Concerns




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PERFORMANCE STRENGTHS - Participant summary percentages greater than 80%

PERFORMANCE CONCERNS - Participant summary percentages less than 30%

Your goal for Performance Strengths is to maintain and support these positive behaviors and beliefs. Conversely, your goal for Performance Concerns is to prioritize your top concerns and determine the appropriate actions to close those gaps.

### PERFORMANCE STRENGTHS

IDEAL RESP.	STATEMENT
 81%	22. Empowerment and involvement throughout the company is strong and higher than expectations.
 81%	23. We have a clear process for recruitment, hiring, and inducting the best new team members.
 81%	45. We make a positive difference in the lives of our employees, our community and the world we live in.

### PERFORMANCE CONCERNS

IDEAL RESP.	STATEMENT
	No Performance Concerns

## Participant List

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Anabelle Anderson  
Christy Clayborne  
John Doe  
Frank Fellows  
Harriet Henderson  
Betty Jackson  
Bob Jones  
Jackie Parsons

Bryant Black  
Dale Dillinger  
Eddie Edwards  
Gretchen Griffiths  
Ian Ingles  
Jack Jerry  
Jane Jones  
Sally Smith