

# SURVEYS FROM SEQUUS

SEQUUS, BOX 545 WINNIPEG BEACH, MB. CANADA  
 PHONE 204-389-4149 Fax 389-4798 e-mail al\_holmes@mts.net

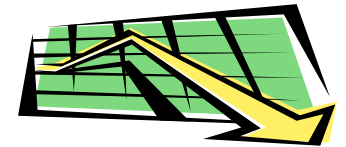
## SOME 'SOFT' MANAGEMENT DECISIONS REQUIRE HARD DATA ...

SEQUUS is in the business of helping managers and leaders do their job more effectively. Sometimes that puts us into the classroom teaching new skills, sometimes we are facilitating problem-solving meetings or planning sessions, and sometimes we are carrying out an independent study to provide decision-makers with the information they require to make tough, strategic choices.

It was this need to bring hard data to 'soft' decision areas that first led SEQUUS directors to develop instruments and software to gather and process opinion and perceptions. Our initial product was a system that helped us to uncover training and development needs among executives, managers and frontline supervisors. This highly successful product not only served to help us design workshops and seminars that responded to real needs, but also became a 'stand-alone' product used by in-house trainers and other consulting organizations. Ken Blanchard, the 'One Minute Manager' author, saw the product and endorsed it.

In the past twenty years our MANAGEMENT TRAINING AND DEVELOPMENT NEEDS SURVEY has been used in every sector of the Canadian economy, translated into several languages (including Swahili) and used, literally, around the world. Customized versions have been used in Investors, Great West, CP, Dome, Sunshine Village, MTS, Manitoba Hydro, the Edmonton General hospital, Winnipeg's Health Sciences Centre, Canada Post and numerous international, federal, provincial and civic departments and agencies.

Success with training needs assessment led to the development of a more general Organization Diagnostic instrument to help guide our growing organization development practise. This widely-used tool led us to develop more precise instruments to measure employee concerns, to assess client/customer satisfaction, to measure the performance of Boards of Directors, to assess training needs of non-managerial staff, to assess sales professionals and sales management training needs, to assess member satisfaction and concerns in membership-based organizations and then to evaluate results and impact..



## 'IMPORTANCE' VERSUS 'PERFORMANCE'

Did you ever find yourself working extremely hard and very efficiently to solve a problem that nobody cared about? Worse yet, have you ever found yourself solving one problem only to uncover new ones or make others worse?

There is a classic story of the financial institution that worked hard to improve the way its frontline staff interacted with its customers after receiving negative feedback on the friendliness of its staff. They taught staff to remember and to use the client's name, and to chat about non-business interests of the client. "Friendliness" scores skyrocketed. However, clients left in droves, moving their accounts to the competition! Why?

It turns out, in the case of the confused bank, that its clients placed far more value on speed than it did on friendliness. However, since the data gathering process never asked what was **valued**, only focussing on **performance** the Bankers ended up fixing a trivial problem while making an important service component worse!

SEQUUS surveys always try to separate the *trivial many* from the *vital few* elements that will make a positive, strategic

### INSIDE

TRAINING AND DEVELOPMENT TOOLS,	2
ORGANIZATION DIAGNOSTIC TOOLS	3
CUSTOMIZATION, PRICES, ACCESS.. ETC	4



## MANAGEMENT TRAINING AND DEVELOPMENT

This is the survey that started our journey into the world of trying to measure the attitudes, opinion, perceptions and values of people in the workplace.

**THE QUESTIONNAIRE:** We now have a data bank consisting of hundreds of items but typically 70 to 80 core items find their way into the questionnaire. For each item we usually ask how important it is to success on the job and how great is the need for training and development. It is typically completed by members of the group for whom the training is intended, by those to whom they report, and often by their staff, peers and sometimes even their clients.

**THE ANALYSIS:** The data is first analysed in the usual way including a distribution of the results over the rating scales along with means and standard deviations. A scoring system separates the trivial from the critical. A 'clustering system' groups items into categories.

**THE REPORT:** In most applications, one report on the entire surveyed population suffices but in large organizations we find ourselves issuing multiple reports. Often we are asked for a report for each organizational unit, each layer in the hierarchy, each geographical location and so on. The contents of a typical 15 to 20 page report would be..

- an Executive Summary usually with recommendations for action on top priority issues.
- a "TOP TEN" ITEM highlight
- 360 degree RANK ORDER comparisons
- FULL DATA SUMMARY
- CLUSTER REPORTS including core items such as "How do fit in?", "What is my specific Job?", Providing Strategic Direction, Leadership Skills, Management Skills, Directing, Supporting, Problem-Solving, Financial Management, Human Resource Management, and Personal Skills.
- We also leave room for organization-specific questions.

**THE OUTCOME:** Out of the survey process comes a preliminary training design that targets the high priority needs. The design is tested with the client and adjusted based on feedback. Then we train.

## SALES AND SALES MANAGEMENT

We have adapted the basic management training and development needs survey methodology to tackle many specific managerial and front-line functions. Sales and Sales management was one of the early adaptations.

## FINANCIAL MANAGEMENT

One area of training that we have struggled with over the years has been financial management training for non-financial managers. To get a better handle on needs, we developed an instrument that focussed directly on this topic.

## CORE COMPETENCIES FOR A NEW WORKFORCE

One client asked us if we had an instrument for non-managers. Our first reaction was that it would be impossible to find a set of core, generic skills and knowledge that applied to all occupations. Then we came across the Conference Board report on the new core competencies required by Canadian employers.

That led to our Core Competency questionnaire that addresses clusters of skills in such areas as...

- Client or Customer Service,
- Product or Service Quality,
- Interpersonal Communications,
- Team Work,
- Continuous Learning,
- Critical thinking,
- Problem Solving,
- Literacy and Numeracy,
- Computer Literacy,
- Creativity, and
- Leadership



## THE 'ODQ'

Our forays into the world of training and development, soon taught us that many “training” problems are really organizational problems. The newly “trained” manager who goes back into the same old environment soon reverts back to the same old behaviours.

So we learned how to diagnose the organization

**THE QUESTIONNAIRE:** We now have a data bank consisting of hundreds of items of core organizational items that we have gathered from our own work and that of others. Usually we select from the bank, items that might apply in a given situation. For each item we usually ask how important it is to organizational success and how the organization is performing on the item.

The questionnaire is typically completed by all members of an organization if possible but in larger organizations we use representative samples.

**THE ANALYSIS:** The data is first analysed in the usual way including a distribution of the results over the rating scales along with means and standard deviations. A scoring system separates the trivial from the critical. A ‘clustering system’ groups items into categories.

**THE REPORT:** In most applications, one report on the entire surveyed population suffices but in large organizations we find ourselves issuing multiple reports. Often we are asked for a report for each organizational unit. The contents of a typical 15 to 20 page report would be..

- an Executive Summary usually with recommendations for action on top priority issues.
- a “TOP TEN’ ITEM highlight
- FULL DATA SUMMARY
- CLUSTER REPORTS including core items such as Service Delivery, Culture, Strategic Direction, Leadership, Management, Directing, Supporting, Problem-Solving, Financial Management, Human Resource Management, and do staff know “How they fit in?” and “What is their role?“,.
- We also leave room for organization-specific questions.

**THE OUTCOME:** Out of the survey process comes a preliminary change agenda that targets the high priority issues. The agenda is tested with the client and adjusted based on feedback. Then we help implement.

## CLIENT & MEMBERSHIP SURVEYS

Many of our clients want to know how their clients, strategic partners and/or members view them.

**THE QUESTIONNAIRE:** These questionnaires are usually custom-designed but start from a core list of key elements based on our experience. The questionnaires typically go out to all or a sampling of persons external to the target organization with a simple means of sending responses directly back to SEQUUS.

**THE ANALYSIS:** The data is first analysed in the usual way including a distribution of the results over the rating scales along with means and standard deviations. A scoring system separates the trivial from the critical. A ‘clustering system’ groups items into categories.

**THE REPORT:** In most applications, one report on the entire surveyed population suffices but in large organizations we find ourselves issuing multiple reports. Often we are asked for a report for different sub-groups and different geographical locations and so on.

Beyond the kinds of data described for the other reports, we are typically reporting on respondent perceptions of..

- product or service quality
- product or service relevance
- service delivery staff competence, behaviours and attitudes,
- perceptions related to organization values, beliefs, and priorities,
- perceptions of leadership and managerial competence, performance, vision etc.
- and we also include organization-specific concerns.



## THE BOARD DEVELOPMENT SURVEY

We do a lot of work with Boards of Directors. We have learned a great deal about the difference between a board that contributes to the success of an organization and one that does not. We have put some of that learning into our widely used Board Development survey. The nice thing about this survey is that it not only assesses the health of your board but also gives a prescription as to what to do about areas that are less than ideal.

**THE QUESTIONNAIRE:** The questionnaire has around 60-70 items. Board members (and sometimes others) are asked to rate both the importance and the performance of the board on each item.

**THE ANALYSIS:** The items from the questionnaire are organized into 13 clusters including such things as...

- recruitment and selection of board members
- orienting and training new board members,
- board meetings and decision-making
- financial management,
- fund raising,
- relationships with paid staff,
- recognition and rewards,
- work climate,
- structure of committees,
- etc.

The report from a typical survey contains a great deal of advice and guidance as to how the board should proceed from here. We also provide board development workshops for boards that wish to have assistance with follow-up.

## VALUES AND BELIEFS

Some organizations want to review their stated core values against performance. They want to see if staff, 'owners', members, clients, suppliers can actually see behaviours and outcomes that are obviously driven by those espoused values. If they can't, what can be done about it? If they can, does it matter?

Our survey approach helps uncover the information needed to begin this kind of assessment.

**CUSTOM ADAPTATION TO YOUR NEEDS:** Any survey identified in this brochure can be customized for your organization. Please contact a SEQUUS consultant for an assessment and cost estimate.

OR

**START FROM SCRATCH:** Many of our survey assignments begin with a blank slate. We identify client questions and build

*For more information or to have someone visit your organization, send your contact information to..  
AL HOLMES, SEQUUS INC, BOX 545 WINNIPEG BEACH ROC 3G0  
or PHONE 204-389-4149 Fax 204-389-4798  
e-mail al\_holmes@mb.sympatico.ca  
These surveys are now available on our website at [www.sequus.org](http://www.sequus.org)*

NAME:

ADDRESS:

CITY, PROVINCE, CODE:

PHONE/FAX

E-MAIL