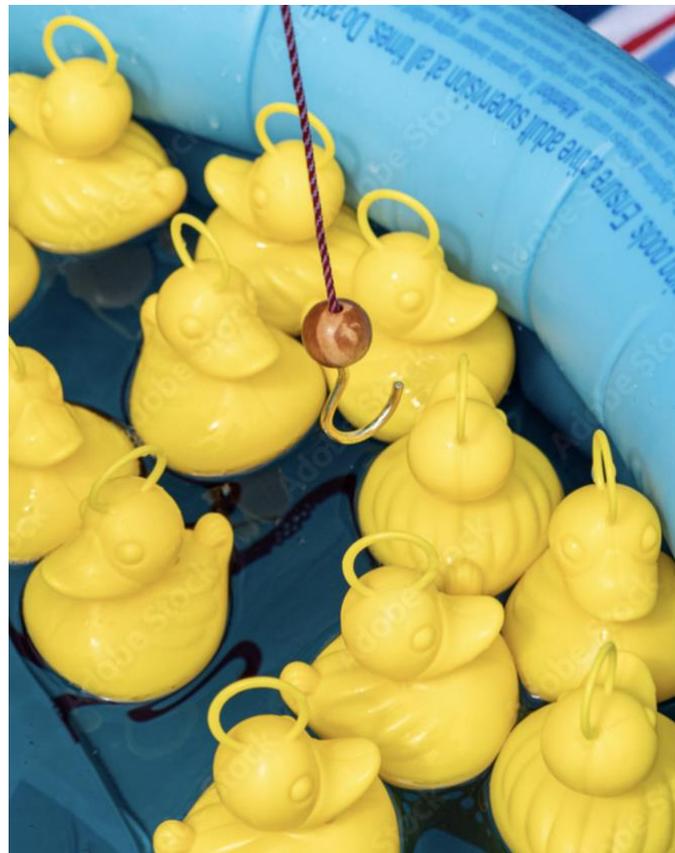


ORG -ology

ORGANIZATIONAL DEVELOPMENT

Targeted Interventions





North America Corporate Office
New York City
USA

Tel: 301-789-9795

ORGANIZATIONAL DEVELOPMENT: TARGETED INTERVENTIONS FOR AN EFFECTIVE WORKPLACE

All staff want to say at the end of the workday, “What I did made a difference. It mattered. I know how my contribution helps this organization.”

And yet. If you survey workplaces, many staff will tell you:

- I spend my day working with processes that don’t work right
- My best work goes into creative work-arounds
- I’m not sure my work contributes to our strategy—what is our strategy?

Organizations often become distracted by “fixing the people” and failing to look at their entire ecosystem, processes, support mechanisms, culture, and communications that contribute to staff succeeding or failing.

Put simply, an organization can hire the best employees. But if it’s impossible to manage a project to success, those staff will leave.

Org-ology’s pragmatic approach identifies key challenges, prioritizes choices based on impact, and develops a targeted path forward to create an effective workplace that retains staff.

ORG-OLGY’S TARGETED ORGANIZATIONAL DEVELOPMENT INTERVENTION

The current speed-of-change, and accompanying complexity of challenges, is unique. Post-pandemic, the workplace has not yet returned to any repeatable pattern of “normal.” Even the most conscientious organizations will find many staff spend their days improvising, creating workarounds, and bending systems and processes in ways that were never imagined.

If you are not regularly reviewing your organization for **how** the work is performed, you will hear statements such as:

- “Sam is leaving after only four months on the project management team. No one seems to stay longer than a year there.”
- “If we just set new KPIs, I’m sure productivity will pick up.”
- “Everyone’s always arguing at meetings. I don’t know why they waste my time.”

Every organization has great staff. And yet that staff can fight against each other if teams and goals are misaligned. Strategy and tasks must be aligned so that success is possible.

Processes and technology must be reviewed regularly to confirm that market changes haven't made them obsolete. And culture, communications, and accountability need regular spot-checks to validate they reflect your values.

Targeted organizational development interventions can specifically address core issues that consistently hinder staff. Org-ology believes that clever and pragmatic choices can create high-value impacts:

- Org-ology partners with clients to prioritize which tactics or processes offer the greatest value.
- Org-ology builds a problem-solving intervention based on impact, effort, cost, and value so that each intervention is an informed decision with a clear view of achievable outcomes.
- Org-ology navigates its clients through the intervention acting as partners, coaches, and support staff as needed.
- Org-ology's pragmatic approach is rooted in being consistent and smart to build long-term improvements.

START SMART:

ASK THE RIGHT QUESTION

Org-ology partners with its clients. Org-ology knows that we cannot bring a magic bullet in a standard toolkit that will automatically work for your organization. We also know that individuals and organizations both have blind spots.

To ask the right question, Org-ology partners with its clients to begin with a problem statement that will be refined through analysis. In this way, our clients can make informed choices, set priorities, and make deliberate choices:

- What market changes concern you?
- What outcomes do you want to see?
- What will you need to be relevant in five years?

ORG-OLOGY'S ANALYSIS APPROACH:

LISTEN AND OBSERVE

If your doctor diagnosed you just by walking into his office, saying, "Clearly you have gout based on your limp."—you'd find another doctor. Diagnosing correctly is critical. Org-ology tailors its approach deliberately to gain nuanced insight:

Surveys: Org-ology calibrates its survey technique with recognition of universal survey fatigue. Developing useful data requires a thoughtful and well-placed instrument. With a careful understanding of the problem statement, Org-ology develops surveys that offer a baseline understanding of critical issues.

These surveys can be custom question sets, or Org-ology's research-based and statistically validated instruments:

- Organizational Trust Inventory
- Organizational Culture Inventory
- Teamwork Culture Inventory

Interviews: Org-ology builds off the survey data by using interviews to offer dimension and insight. Org-ology selects interview participants to allow a broad understanding of an organization from multiple levels and competencies.

Smart interviewing is essential to gathering insight into organizational culture. Org-ology knows that all successful organizational development interventions require cultural understanding:

- What are the unwritten rules of this organization?
- Are these the behaviors we want to foster?

Observation: Org-ology challenges its clients to consider observation from two angles: group dynamics and data.

- **Group dynamics** and task observation are essential for any organization to gain outside perspective. Org-ology knows that both persons and organizations lose sight of their unique habits in the day-to-day rush. Org-ology consultants offer up a mirror by observing and reflecting those habits, with the questions of “Is how you do this work still relevant? And is this the way you want to do this task?”
- **Systems data** are yet another opportunity to observe how work is done: error reports, task performance, and protocol compliance. All of these are objective observations Org-ology uses to build out yet greater insight into how effectively an organization is functioning.

Org-ology knows that a well-executed analysis is the essential first step in effective change management and adoption later

ANALYZE AND REFINE

With data in-hand, Org-ology returns to the given problem statement and questions all assumptions:

- How accurate was the initial problem assessment?
- How does the broader picture inform our thinking?
- When the desired client outcomes are compared to the data at hand, what options present themselves?

If an organization wants to select a truly effective intervention, the data must be understood for what they are—not what we want to believe they are. To achieve this, Org-ology analyzes the data for both the expected and unexpected.

Org-ology uses this point to both create both a detailed synopsis of the data as well as a critique of the original assumptions. This critique allows both the client as well as Org-ology to consider the needs with fresh eyes.

INTERPRET

Org-ology brings best-in-class organizational solutions to the problem, and we collaborate with the clients to build out those solutions to be the right one for that unique client.

- We begin the dialogue by presenting each client with our recommendations based on the data at hand.
- We present differing options for an identified need allowing for lower or higher effort and cost choices.
- We suggest a ranking of priorities based on criticality of the identified challenges.

With this in hand, Org-ology partners with the client to discuss what's right for the needs, the organization, the timeline, and the ability of that client to grow.

Org-ology prioritizes interventions that can meet two key criteria:

- Address a critical need.
- Begin and complete with success.

Organizations are made up of people. Those people are the ones who will be impacted by the interventions selected here. If a client wants to build and retain their best staff, be a world-class organization, and continue to adapt, the intervention selected must be “do-able.”

IMPLEMENT

Anyone who's ever learned to ride a bike knows:

- You can't learn to ride by watching a video.
- You can't have someone else do it for you.

That's true with organizational interventions as well. Org-ology will supply the expertise, the support, and the know-how. And the client will partner with staff, internal expertise, and engagement.

Depending on the unique intervention, Org-ology often supports its clients with:

- Project management
- One-on-one coaching
- Development of key deliverables
- Workshops that partner to develop teams, processes, or SOPs
- Training
- Change management
- Communications, messaging, and outreach

Each targeted intervention is unique to its client needs.

MANAGE CHANGE AND ADOPT

Org-ology believes that change management does not happen as an “event” within a project deployment.

Change management begins with engaging the correct staff in data gathering, continues in selecting an intervention that is achievable and essential to the organization, and executes an intervention in an inclusive and transparent way.

Org-ology regularly partners with its client’s change management teams and can work with all types of change management philosophies. We believe that it is our role to begin and end with an organization’s staff in mind, and develop our work in a way that allows for adoption.

The workplace is one of consistent disruption. The last several years have demonstrated that. By building any intervention on the basis of continuous disruption and change, we develop tools that can adapt and evolve in this ecosystem.

CASE STUDY: HOW THIS WORKS IN THE REAL WORLD

THE CHALLENGE:

HOW DO WE RETAIN THE PEOPLE WE NEED WHO HAVE CRITICAL SKILLS?

- Organizations of 100,000+ across 8 different functional silos, in theory under a centralized HR function for employee development/training, organizational design, and succession planning.
- Certain specific staff skills were more critical than they had been in the past and were becoming more expensive to replace through hiring.
- Hiring process was clumsy and slow and could not adapt to quickly evolving staffing requirements in financial regulations and industry changes.
- Staff were quitting—leaving for better pay, benefits, and career development opportunities.

THE TECHNIQUE:

ORGANIZATIONAL SUCCESSION PLANNING AND DESIGN PROCESS

- Change the mindset of why we do succession planning by teaching leaders to look for and plan for the future
- Focus on career development process so that employees want to stay
- Eliminate ad-hoc programs and use the power of your centralized HR by training, developing, and staff planning gain effectiveness when done in a strategic, deliberate way.
- Apply technology to create useful management data

INTERVENTION

- Developed on-line staff assessment tools for performance management cycles and ad-hoc staff management

- For every-day management, built “9 box” toolkit to evaluate staff, see a visual of staff performance, and development potential
- For performance management cycles, built a competency modeling toolkit to identify skill gaps, define development plans, and get a big picture of future staffing needs
- HR professionals consolidated the organization’s competency and staff development data using people analytics, enabling oversight and evaluation of organizational structures, staffing needs, and spending.
- Both HR and staff managers could monitor and review data

RESULTS

- Transformed people-management process within the organization—Data insight enabled better understand of needs and better use of resources.
- Organization now had the data and tools to address staff retention concerns and address promotion processes in a systemic and fair manner.
- Data-based organizational redesign—For the first time the organization had a complete and accurate view of what the workforce and structure looked like. The organization could define and design an agile and adaptive organization to face future challenges.

NEXT STEPS

- Activities included expanding these processes down into middle-leadership tiers and addressing performance issues.

WHY US

Org-ology’s coaching programs offer what others don’t:

- Org-ology’s structured approach balances personal insight with applied goals to ensure the coaching output has an organizational impact.
- Org-ology is an organizational development specialist. As such, our coaching guides your staff and teams from an organizational development perspective. How is our coaching work helping you execute your strategic plan?
- We bring human psychology and change management expertise. Human behavior is complex. Our nuanced understanding of personal and organizational change enables us to bring greater value to each coaching relationship.

Org-ology, through our long-standing relationship with organizations like yours and our substantial public and private sector practice, is uniquely qualified to assist your organization in achieving its goals. Our team of professionals brings well-established, positive relationships, deep technical expertise, and unparalleled public and private sector

experience. We are the right choice and distinguish ourselves from the competition in the following ways:

INNOVATIVE SOLUTIONS—Our qualifications demonstrate that we’ve worked with many organizations similar to yours. This depth of experience is important because it enables us to offer you innovative thinking and solutions that are pragmatic, unique, and right for you.

With more than 20 years’ experience with similar organizations, the most important client is you. We use our experience to find the best solutions for your organization, with its unique challenges. Using creativity, pragmatism, and data we put our deep experience to work for your organization.

BUILT TO SUCCEED AND SUSTAIN—We believe in delivering lasting success. Value, cost-savings, and return on investment (ROI) all come from successfully implementing the right project in the right way.

True value and cost savings comes from a project that can sustain and continue to succeed after it’s been launched. Our solutions demonstrate that value.

DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY (DEIA)-CERTIFIED—DEIA is not a trend. For over the last decade Org-ology consulting services have integrated the DEIA lens into our work.

Diversity, Equity, Inclusion and Accessibility are central high-functioning, best-in-class organizations. We approach this through:

- Improving policies and practices to create and support full diversity
- Building a culture of trust, respect, and engagement for all employees
- Focusing on an organization that allows not only for all groups to thrive but also increased organization effectiveness
- Assessing and adjusting to evolve as decision makers to:
 - Admit when course corrections or other alterations need to be made.
 - Continue to “listen to learn” from diverse viewpoints along the way.

DEMONSTRATED TRACK RECORD—Org-ology has deep and broad experience in the public and private sector. Key to our retention has been a record of strong client service and consultative services. We have provided innovative and strategic solutions that have resulted in significant savings for our clients and their employees and participants. To illustrate this point, our leadership has served the State and Federal agencies for more than 20 years. Our public and private sector client list illustrates our knowledge and understanding of industry-specific processes, challenges, and solutions.

QUALITY PRODUCT DEVELOPMENT AND DELIVERY—You will receive very high-quality work from committed professionals while consistently meeting your deadlines.

You will always receive a consistently high level of service throughout the contract period from an organization that is committed to your success. This commitment to service excellence has been a key driver of our strong client growth and our continuous relationships with our clients. This growth has allowed us to invest in research,

development, education, and training, and to recruit some of the best and brightest professionals in the industry to meet your needs.

VAST RESOURCES—Org-ology and our partner firms are comprised of several complementary practices that include Organization Design/Re-organization, Employee and Organization Performance Management, Change Management Consulting, Human Capital Development, Employee Training, Leadership Coaching and Engagement, Management Consulting. Throughout the course of our relationship, issues could arise which fall outside the confines of the coaching support services. We are able to assist you in addressing these topics through a broad network of local and national client service professionals.

HIGH VALUE—Org-ology is committed to offering you value in consulting services. We look forward to bringing innovative solutions as you seek to provide cost-effective and quality services to your constituents. By selecting Org-ology, you will get high value consulting services for the fees paid for each of the services mentioned above, especially our public sector experience. Our pricing reflects professional fees that recognize the economic realities of public sector consulting.

If you have any questions regarding this proposal, please contact Dr. Brent Oberholtzer at 301-789-9795 brentoberholtzer@org-ology.com or Heidi Feickert at 240-620-3655 heidifeickert@org-ology.com.

Sincerely,
Org-ology

ORG-LOGY PAST PERFORMANCE

The key to exemplary professional services is diverse, talented, experienced, and dedicated professionals. Led by our principals, the multidisciplinary team of professionals selected to serve you brings a combination of high-level client service, public and private sector industry knowledge, consulting experience, and business acumen that you will not find from another service provider. Collectively, they possess the breadth of skills needed for your organizations current and future needs.

Various past performance evaluations are available upon request

SOME OF OUR PREVIOUS CLIENTS

