Should We Transform or Shouldn’t We?
That Is the Question

Presented By:
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October 27, 2014
Presentation Overview

- Should we transform?
- Case-study and underlying models and assumptions
- Overview of how the OTI™ works
- Data structure, scoring patterns, reliability, and validity
- Administering the OTI
- Reporting on results
- Questions and discussion
Should We Transform?

- This is a complex decision based on many factors
- Deep change almost always requires a burning platform
- Proactive platform
  - OTI can help make the business decision up-front
- Reactive platform
  - OTI can identify organizational barriers you’re likely to face
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Case-Study Business Case and Vision

- DOE Nuclear Weapons Complex
  - LANL, LLNL, SNL, NNSS, Pantex, KCP, SRS, Y-12 (eight sites)
  - Post 9-11 mission shift from weapons-only to National Security Labs using mission-related WFO revenue to augment the Lab’s appropriated funds… Director’s all-hands meeting…

  “The laboratory is taking action to shape its future by focusing on the Right Work, the Right Processes, and the Right Workforce to create the Right Laboratory.”

- Key: Develop a cost and pricing model to be competitive
- Use org was a pilot program (700 people, $140M per year)
- Performed a transformation study/made recommendations
The Four-Ways

Externally Focused

Internally Focused

What

Why

How

Who

Structures & Systems

Human Performance

#ODN14
Case-Study Transformation Strategy

- Hedge-Hog
- Externally Focused
- Internally Focused
- What
- Why
- Who
- How
- Human Performance
- Leadership in Context
- Structures & Systems
- EPS & SRS COTS
- Leadership in Context EPS & SRS COTS
Case-Study Organizational Resistance

High-performers who support change
Moderate-performers who support change
High-performers who do not support change
Case-Study Intrapsychic Resistance; Transference and Countertransference

Based on Argyris, Schein, Jung...

LH COLUMN

What We Think and Feel
But Do Not Say and Do

Natural-Self
Inner Commentary

Is the Origin
Conscious, Unconscious, or Both?

RJ COLUMN

What We Say and Do

Socialized-Self
Shaped by Context

Differential Pressure
SSC & PICR Can Create Border Guards
“My People...”
“My Facilities... My Equipment...”
“My Budget...!!!
Case-Study Individual-Collective Paradox

“Organizations are collective-cultural entities that are led, managed, and changed, one person at a time…”

Structures & Systems

Externally Focused (Centrifugal)

- ENTJ, ESTJ, ENFJ, ESTP
  - Te, Te, Fe, Se
- What Gets Done
  - “I-Those”
  - J

Internally Focused (Centripetal)

- ENFP, ENTP, ESFJ, ESFP
  - Ne, Ne, Fe, Se
- Why It Gets Done
  - “I-We”
  - P

Human Performance

- N, S, T
  - How It Gets Done
    - “I-It”
    - INFJ, INTJ, ISTP, ISTJ
    - Ni, Ni, Ti, Si

- N, S, F
  - Who Gets Things Done
    - “I-Thou”
    - INFP, ISFP, INTP, ISFJ
    - Fi, Fi, Ti, Si

2 Managers (Client)

2 Managers

4 Managers (Deputy)

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Case-Study Leadership in Context

Cultural Context
- Cultural Barriers
- Structures, Systems, Culture
- Create P, I, C, R

Business Situation
- Events, Patterns, History, Identity, EPT
- OTI Interpersonal & Group Dynamics
- OTI Emotional Competencies
- OTI Basic Assumptions

Lead
- Lead Down (Delegation)
- Lead Across (Influence)
- Lead Up (Influence)

Degree of Org Boundary Permeability

Business Situation
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Case-Study on How the OTI Works

- **Point A** Define the Business Problem; Use Precision Case Studies
  
  Move from bottom R-side of the Four-Ways graph Towards the top L-side of the graph with two report Recommendations.

- **Basic Assumptions**
  - Organizational Integrity
  - Organizational Truth

- **Interpersonal and Group Dynamics**
  - Organizational Power
  - Organizational Competency

- **Interpersonal and Group Dynamics**
  - Organizational Teamwork
  - Organizational Communication

- **Emotional Competencies**
  - Self-Awareness
  - Self-Management
  - Effective Listening

- **Level of Trust?**
- **See Need for Change?**

- **Point B**
- **Positive Change Transform End-State**
  
  Right Work, Right Processes Right Workforce Right Laboratory

- **Learning and Unlearning**

---

**Organization Development Network (ODN)**

Advancing the Field of OD

50th Anniversary
Connected to Underlying S, S, C

Point A
Define the Business Problem;
Use Precision Case Studies

Management Systems

Point B
Positive Change Transform End-State

Leadership Systems (EPT/G)

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- Organizational Truth

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Individual-Collective Paradox (EPT/Gap)

Learning and Unlearning

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**REPORTED RESULTS**

The data on the chart below show the first six of nine indicators of the degree to which your organization: a) sees the need for positive change in operational strategies, beliefs, and values that may be barriers to transformation, and b) has the foundation of organizational trust required to achieve organizational and behavioral transformation. High scores of 60 percent and above indicate that your organization does see the need for positive change in that OTI™ perspective and low scores of 40 percent and below indicate that your organization does not see the need for positive change in this OTI™ perspective.

![Chart showing OTI scores for different roles](chart.png)

<table>
<thead>
<tr>
<th>Role</th>
<th>INT</th>
<th>TIM</th>
<th>TRU</th>
<th>COMP</th>
<th>POW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top closest</td>
<td>80.9</td>
<td>66.9</td>
<td>63.1</td>
<td>80.0</td>
<td>71.5</td>
</tr>
<tr>
<td>Middle closest</td>
<td>91.1</td>
<td>76.9</td>
<td>20.2</td>
<td>76.9</td>
<td>4.2</td>
</tr>
<tr>
<td>President</td>
<td>91.1</td>
<td>76.9</td>
<td>20.2</td>
<td>76.9</td>
<td>4.2</td>
</tr>
</tbody>
</table>

The scores are also an indication of the degree of consensus and level of shared understanding between top managers and other populations, and the degree of consensus and level of shared understanding within a given population about how the first six perspectives of the OTI™ are manifested in day-to-day operations. Each population in the above chart has a four-score-box cluster associated with it like the one shown in the diagram below. The top-left score-box (51.8) shows the averaged scores of the respondents in that population. When the score of top managers (62.4) and the averaged scores of a population differ by less than 20 percent, the population’s scores appear in green which indicates that top managers and respondents in that population have consensus and a shared understanding about how that perspective manifests itself in the organization.

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*Note: The image contains a chart showing OTI scores for different roles, and a table comparing INT, TIM, TRU, COMP, and POW scores for top closest, middle closest, and President roles.*
Radar Graph

- President
- Vice President
- Manager
- Supervisor
- Staff
Scoring Patterns (HH, LL, HL,LH)

- President
- Vice President
- Manager
- Supervisor
- Staff
## Four-Box Chart

The Four-Box Chart illustrates the averaged scores of a population, the high-low points (spread) of the distribution of "votes", and the degree of consensus and level of shared understanding within a group. The chart includes the score of the top manager, which is 62.4.

<table>
<thead>
<tr>
<th>Position</th>
<th>INT</th>
<th>TRU</th>
<th>POW</th>
<th>COMP</th>
<th>TMWK</th>
<th>COMM</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>70.0</td>
<td>80.0</td>
<td>60.0</td>
<td>80.0</td>
<td>70.0</td>
<td>70.0</td>
</tr>
<tr>
<td>Vice President</td>
<td>90.0</td>
<td>41.8</td>
<td>85.0</td>
<td>30.9</td>
<td>75.0</td>
<td>55.5</td>
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<tr>
<td></td>
<td>100.0</td>
<td>58.2</td>
<td>100.0</td>
<td>69.1</td>
<td>100.0</td>
<td>44.5</td>
</tr>
<tr>
<td>Manager</td>
<td>69.5</td>
<td>20.7</td>
<td>76.0</td>
<td>9.8</td>
<td>70.0</td>
<td>16.6</td>
</tr>
<tr>
<td></td>
<td>79.8</td>
<td>59.1</td>
<td>80.9</td>
<td>71.1</td>
<td>78.3</td>
<td>61.7</td>
</tr>
<tr>
<td>Supervisor</td>
<td>55.0</td>
<td>20.0</td>
<td>64.2</td>
<td>19.9</td>
<td>66.0</td>
<td>18.3</td>
</tr>
<tr>
<td></td>
<td>65.0</td>
<td>45.0</td>
<td>74.2</td>
<td>54.3</td>
<td>75.2</td>
<td>56.8</td>
</tr>
<tr>
<td>Staff</td>
<td>61.0</td>
<td>7.6</td>
<td>64.7</td>
<td>6.5</td>
<td>57.0</td>
<td>7.5</td>
</tr>
<tr>
<td></td>
<td>64.8</td>
<td>57.2</td>
<td>67.9</td>
<td>61.4</td>
<td>60.8</td>
<td>53.2</td>
</tr>
</tbody>
</table>
## Squandered Energy

### Squandered Organizational Energy

<table>
<thead>
<tr>
<th>Population</th>
<th>FTE $/Hr</th>
<th>Hrs/Day</th>
<th># of Emp</th>
<th>Lost $/Yr 1</th>
<th>Lost $/Yr 2</th>
<th>Lost $/Yr 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>$125</td>
<td>1.00</td>
<td>1</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$75,000</td>
</tr>
<tr>
<td>Vice President</td>
<td>$125</td>
<td>1.00</td>
<td>3</td>
<td>$75,000</td>
<td>$75,000</td>
<td>$75,000</td>
<td>$225,000</td>
</tr>
<tr>
<td>Manager</td>
<td>$94</td>
<td>1.30</td>
<td>10</td>
<td>$244,400</td>
<td>$244,400</td>
<td>$244,400</td>
<td>$733,200</td>
</tr>
<tr>
<td>Supervisor</td>
<td>$75</td>
<td>1.60</td>
<td>40</td>
<td>$960,000</td>
<td>$960,000</td>
<td>$960,000</td>
<td>$2,880,000</td>
</tr>
<tr>
<td>Staff</td>
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<td>1.36</td>
<td>500</td>
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<td>$6,380,603</td>
<td>$6,380,603</td>
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<td>Total</td>
<td>554</td>
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<td>$7,685,003</td>
<td>$7,685,003</td>
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### Squandered Psychological Energy

<table>
<thead>
<tr>
<th>Population</th>
<th>FTE $/Hr</th>
<th>Hrs/Day</th>
<th># of Emp</th>
<th>Lost $/Yr 1</th>
<th>Lost $/Yr 2</th>
<th>Lost $/Yr 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>$125</td>
<td>0.25</td>
<td>1</td>
<td>$6,250</td>
<td>$6,250</td>
<td>$6,250</td>
<td>$18,750</td>
</tr>
<tr>
<td>Vice President</td>
<td>$125</td>
<td>2.00</td>
<td>3</td>
<td>$150,000</td>
<td>$150,000</td>
<td>$150,000</td>
<td>$450,000</td>
</tr>
<tr>
<td>Manager</td>
<td>$94</td>
<td>0.40</td>
<td>10</td>
<td>$75,200</td>
<td>$75,200</td>
<td>$75,200</td>
<td>$225,600</td>
</tr>
<tr>
<td>Supervisor</td>
<td>$75</td>
<td>0.50</td>
<td>40</td>
<td>$300,000</td>
<td>$300,000</td>
<td>$300,000</td>
<td>$900,000</td>
</tr>
<tr>
<td>Staff</td>
<td>$47</td>
<td>1.14</td>
<td>500</td>
<td>$5,340,906</td>
<td>$5,340,906</td>
<td>$5,340,906</td>
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<tr>
<td>Total</td>
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<td>$5,872,356</td>
<td>$5,872,356</td>
<td>$5,872,356</td>
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</tbody>
</table>

### Squandered Time and Energy in Meetings

<table>
<thead>
<tr>
<th>Population</th>
<th>FTE $/Hr</th>
<th>Hrs/Day</th>
<th># of Emp</th>
<th>Lost $/Yr 1</th>
<th>Lost $/Yr 2</th>
<th>Lost $/Yr 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>$125</td>
<td>0.25</td>
<td>1</td>
<td>$6,250</td>
<td>$6,250</td>
<td>$6,250</td>
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</tr>
<tr>
<td>Vice President</td>
<td>$125</td>
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<td>3</td>
<td>$37,500</td>
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<td>Manager</td>
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<td>0.65</td>
<td>10</td>
<td>$122,200</td>
<td>$122,200</td>
<td>$122,200</td>
<td>$366,600</td>
</tr>
<tr>
<td>Supervisor</td>
<td>$75</td>
<td>1.10</td>
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<td>$660,000</td>
<td>$660,000</td>
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<tr>
<td>Staff</td>
<td>$47</td>
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<td>500</td>
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<td>$2,136,362</td>
<td>$2,136,362</td>
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<tr>
<td>Total</td>
<td>554</td>
<td></td>
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<td>$2,962,312</td>
<td>$2,962,312</td>
<td>$2,962,312</td>
<td>$8,886,935</td>
</tr>
</tbody>
</table>
Case-Study Radar Graph

- AD
- DAD
- Division Leaders
- Group Leaders
- Team Leaders
- Directorate Staff
- Staff
## Case-Study Data Chart

<table>
<thead>
<tr>
<th></th>
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<th>TMWK</th>
<th>COMM</th>
<th>TRU</th>
<th>COMP</th>
<th>POW</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AD</strong></td>
<td>95.0</td>
<td>95.0</td>
<td>75.0</td>
<td>75.0</td>
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<td>0.0</td>
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<tr>
<td><strong>DAD</strong></td>
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<td>53.0</td>
<td>66.4</td>
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<td></td>
<td>72.2</td>
<td>43.8</td>
<td>79.5</td>
<td>66.7</td>
<td>68.4</td>
<td>71.7</td>
</tr>
<tr>
<td><strong>Division Leaders</strong></td>
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<td>15.4</td>
<td>50.3</td>
<td>53.1</td>
<td>46.5</td>
<td>42.6</td>
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<td>55.1</td>
<td>39.6</td>
<td>58.5</td>
<td>53.5</td>
<td>48.6</td>
<td>49.9</td>
</tr>
<tr>
<td><strong>Group Leaders</strong></td>
<td>61.8</td>
<td>10.2</td>
<td>55.8</td>
<td>54.1</td>
<td>52.7</td>
<td>52.5</td>
</tr>
<tr>
<td><strong>Team Leaders</strong></td>
<td>66.9</td>
<td>56.7</td>
<td>61.8</td>
<td>59.2</td>
<td>58.1</td>
<td>57.6</td>
</tr>
<tr>
<td><strong>Directorate Staff</strong></td>
<td>42.8</td>
<td>18.5</td>
<td>34.9</td>
<td>41.7</td>
<td>44.1</td>
<td>37.8</td>
</tr>
<tr>
<td></td>
<td>52.0</td>
<td>33.6</td>
<td>45.2</td>
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<td>54.0</td>
<td>47.1</td>
</tr>
<tr>
<td><strong>Staff</strong></td>
<td>50.1</td>
<td>4.2</td>
<td>47.6</td>
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<td>47.2</td>
<td>46.3</td>
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<td>48.0</td>
<td>49.9</td>
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<td>48.4</td>
</tr>
<tr>
<td>Population</td>
<td>FTE $/Hr</td>
<td>Hrs/Day</td>
<td># of Emp</td>
<td>Lost $/Yr 1</td>
<td>Lost $/Yr 2</td>
<td>Lost $/Yr 3</td>
</tr>
<tr>
<td>---------------------</td>
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<tr>
<td>AD</td>
<td>$125</td>
<td>2.00</td>
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<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
</tr>
<tr>
<td>DAD</td>
<td>$125</td>
<td>2.00</td>
<td>1</td>
<td>$50,000</td>
<td>$50,000</td>
<td>$50,000</td>
</tr>
<tr>
<td>Division Leaders</td>
<td>$94</td>
<td>3.20</td>
<td>5</td>
<td>$300,800</td>
<td>$300,800</td>
<td>$300,800</td>
</tr>
<tr>
<td>Group Leaders</td>
<td>$94</td>
<td>1.63</td>
<td>17</td>
<td>$521,700</td>
<td>$521,700</td>
<td>$521,700</td>
</tr>
<tr>
<td>Team Leaders</td>
<td>$75</td>
<td>1.70</td>
<td>22</td>
<td>$562,500</td>
<td>$562,500</td>
<td>$562,500</td>
</tr>
<tr>
<td>Directorate Staff</td>
<td>$47</td>
<td>1.72</td>
<td>9</td>
<td>$145,700</td>
<td>$145,700</td>
<td>$145,700</td>
</tr>
<tr>
<td>Staff</td>
<td>$47</td>
<td>1.81</td>
<td>207</td>
<td>$3,514,660</td>
<td>$3,514,660</td>
<td>$3,514,660</td>
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<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>262</td>
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<table>
<thead>
<tr>
<th>Squandered Psychological Energy</th>
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</thead>
<tbody>
<tr>
<td>Population</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>AD</td>
</tr>
<tr>
<td>DAD</td>
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<tr>
<td>Division Leaders</td>
</tr>
<tr>
<td>Group Leaders</td>
</tr>
<tr>
<td>Team Leaders</td>
</tr>
<tr>
<td>Directorate Staff</td>
</tr>
<tr>
<td>Staff</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Squandered Time and Energy in Meetings</th>
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</thead>
<tbody>
<tr>
<td>Population</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>AD</td>
</tr>
<tr>
<td>DAD</td>
</tr>
<tr>
<td>Division Leaders</td>
</tr>
<tr>
<td>Group Leaders</td>
</tr>
<tr>
<td>Team Leaders</td>
</tr>
<tr>
<td>Directorate Staff</td>
</tr>
<tr>
<td>Staff</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
</tbody>
</table>
REPORTED RESULTS

The data on the chart below show the first six of nine indicators of the degree to which your organization: a) sees the need for positive change in operational strategies, beliefs, and values that may be barriers to transformation, and b) has the foundation of organizational trust required to achieve organizational and behavioral transformation. High scores of 80 percent and above indicate that your organization does see the need for positive change in that OTT™ perspective and low scores of 40 percent and below indicate that your organization does see the need for positive change in this OTT™ perspective.

The scores are also an indication of the degree of consensus and level of shared understanding between top managers and other populations, and the degree of consensus and level of shared understanding within a given population about how the first six perspectives of the OTT™ are manifested in day-to-day operations. Each population in the above chart has a four-score-box-cluster associated with it like the one shown in the diagram below. The top-left score-box (51.6) shows the averaged scores of the respondents in that population. When the score of top managers (62.4) and the averaged scores of a population differ by less than 20 percent, the population's scores appear in green which indicates that top managers and respondents in that population have consensus and a shared understanding about how that perspective manifests itself in the organization.
### Data Level 2

#### INTEGRITY

<table>
<thead>
<tr>
<th>Role</th>
<th>RESPONSE (CL)</th>
<th>CONSENSUS</th>
<th>STAT SIG</th>
<th>COHEN'S D</th>
</tr>
</thead>
<tbody>
<tr>
<td>DIV LDR</td>
<td>5/6 = 83% (85%)</td>
<td>28.4</td>
<td>S</td>
<td>M</td>
</tr>
<tr>
<td>GP LDR</td>
<td>17/20 = 85% (92%)</td>
<td>15.4</td>
<td>S</td>
<td>L</td>
</tr>
<tr>
<td>TM LDR</td>
<td>22/30 = 73% (91%)</td>
<td>10.2</td>
<td>S</td>
<td>S</td>
</tr>
<tr>
<td>DIR STF</td>
<td>9/19 = 47% (88%)</td>
<td>18.5</td>
<td>NS</td>
<td>S</td>
</tr>
<tr>
<td>STAFF</td>
<td>207/535 = 39% (95%)</td>
<td>4.2</td>
<td>NS</td>
<td>S</td>
</tr>
</tbody>
</table>

- **CONSENSUS**
- **STAT SIG**: S = Significant, NS = Not Significant
- **COHEN'S D**: M = Medium, L = Low, S = Small
### OTI™ - Detailed Report by Population

**Thursday, September 12, 2013**

#### Perspective: Integrity (Consistency)

<table>
<thead>
<tr>
<th>Question</th>
<th>Population</th>
<th>Count</th>
<th>Avg</th>
<th>Spread</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers are consistently honest and ethical in how they conduct their day-to-day operations.</td>
<td>Executive Director</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Managers</td>
<td>4</td>
<td>95</td>
<td>20.9</td>
</tr>
<tr>
<td></td>
<td>Supervisors</td>
<td>4</td>
<td>55</td>
<td>92.7</td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td>6</td>
<td>90</td>
<td>21.5</td>
</tr>
<tr>
<td>This organization has a consistent track-record for delivering on its commitments and goals; e.g. we do what we say.</td>
<td>Executive Director</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Managers</td>
<td>4</td>
<td>85</td>
<td>20.9</td>
</tr>
<tr>
<td></td>
<td>Supervisors</td>
<td>4</td>
<td>40</td>
<td>73.5</td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td>6</td>
<td>83.3</td>
<td>31.6</td>
</tr>
</tbody>
</table>

#### Perspective: Integrity (Transparency)

<table>
<thead>
<tr>
<th>Question</th>
<th>Population</th>
<th>Count</th>
<th>Avg</th>
<th>Spread</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers practice “fair process,” basing their decisions on objective facts, quantitative data, and objective analysis, rather than subjective factors like “politics” or “personalities.”</td>
<td>Executive Director</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Managers</td>
<td>4</td>
<td>95</td>
<td>20.9</td>
</tr>
<tr>
<td></td>
<td>Supervisors</td>
<td>4</td>
<td>40</td>
<td>98.1</td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td>6</td>
<td>70</td>
<td>23</td>
</tr>
<tr>
<td>There is little or no gap between the formal (written) rules for how things get done in this organization, and the informal (unwritten) rules for how things “really” get done.</td>
<td>Executive Director</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Managers</td>
<td>4</td>
<td>80</td>
<td>46</td>
</tr>
<tr>
<td></td>
<td>Supervisors</td>
<td>4</td>
<td>30</td>
<td>36.7</td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td>6</td>
<td>73.3</td>
<td>50.8</td>
</tr>
</tbody>
</table>

#### Perspective: Truth (Inquiry)

<table>
<thead>
<tr>
<th>Question</th>
<th>Population</th>
<th>Count</th>
<th>Avg</th>
<th>Spread</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers encourage people to question the reasoning and assumptions that motivate the organization’s decisions without fear of retribution.</td>
<td>Executive Director</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Managers</td>
<td>4</td>
<td>90</td>
<td>28.4</td>
</tr>
<tr>
<td></td>
<td>Supervisors</td>
<td>4</td>
<td>50</td>
<td>82.2</td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td>6</td>
<td>83.3</td>
<td>31.6</td>
</tr>
<tr>
<td>People are encouraged to question the “status quo” and ineffective ways-of-working without fear of retribution.</td>
<td>Executive Director</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Managers</td>
<td>4</td>
<td>85</td>
<td>30.9</td>
</tr>
<tr>
<td></td>
<td>Supervisors</td>
<td>4</td>
<td>40</td>
<td>73.5</td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td>6</td>
<td>86.7</td>
<td>30.5</td>
</tr>
</tbody>
</table>

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#ODN14
**REPORTED RESULTS**

The data on the radar graph and chart below indicate the degree to which you, your manager, peers, and direct reports: a) see the need for change in operational strategies, beliefs, and values that may be barriers to positive change in your organization, and b) have the foundation of organizational trust required to achieve organizational and behavioral transformation in your organization. High scores of 80 percent and above indicate that you do not see the need for change in that OLI™ perspective and low scores of 40 percent and below indicate that you do see the need for change in this OLI™ perspective.

![Radar Graph](image)

<table>
<thead>
<tr>
<th></th>
<th>INT</th>
<th>TRU</th>
<th>POW</th>
<th>COMP</th>
<th>TMW</th>
<th>COMM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td>100</td>
<td>100</td>
<td>60</td>
<td>60</td>
<td>60</td>
<td>60</td>
</tr>
<tr>
<td>Manager</td>
<td>56</td>
<td>17.9</td>
<td>79.9</td>
<td>41.1</td>
<td>75.8</td>
<td>75.8</td>
</tr>
<tr>
<td>Direct Reports</td>
<td>56</td>
<td>61.1</td>
<td>79.8</td>
<td>61.1</td>
<td>78.9</td>
<td>78.9</td>
</tr>
<tr>
<td>Peers</td>
<td>64</td>
<td>5.3</td>
<td>60</td>
<td>5.3</td>
<td>55</td>
<td>55</td>
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</tbody>
</table>

The scores are also an indication of the level of consensus and shared understanding that you have with your manager, peers, and direct reports about how the first six OLI™ perspectives are manifested in day-to-day operations. Each population in the above chart has a four-score-box-cluster associated with it like the one shown in the diagram below. The top-left score-box (51.8) shows the averaged scores of the respondents in that population. When your scores (62.4) and the averaged scores of a population differ by...
## Data Level 5

### OLI™ - Detailed Report by Population

**Friday, September 13, 2013**

#### Perspective: Integrity (Consistency)

<table>
<thead>
<tr>
<th>Question</th>
<th>Population</th>
<th>Count</th>
<th>Avg</th>
<th>Spread</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am consistently honest and ethical in how I conduct my day-to-day operations.</td>
<td>Self</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have a consistent track-record for delivering on my commitments and goals, e.g., I do what I say.</td>
<td>Manager</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Direct Reports</td>
<td>4</td>
<td>80</td>
<td>46</td>
</tr>
<tr>
<td></td>
<td>Peers</td>
<td>4</td>
<td>95</td>
<td>20.9</td>
</tr>
<tr>
<td></td>
<td>Self</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Manager</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Direct Reports</td>
<td>4</td>
<td>70</td>
<td>36.7</td>
</tr>
<tr>
<td></td>
<td>Peers</td>
<td>4</td>
<td>85</td>
<td>30.9</td>
</tr>
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</table>

#### Perspective: Integrity (Transparency)

<table>
<thead>
<tr>
<th>Question</th>
<th>Population</th>
<th>Count</th>
<th>Avg</th>
<th>Spread</th>
</tr>
</thead>
<tbody>
<tr>
<td>I practice “fair process,” basing my decisions on objective facts, quantitative data, and objective analysis, rather than subjective factors like “politics” or “personalities.”</td>
<td>Self</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In my organization, there is little or no gap between the formal (written) rules for how things get done, and the informal (unwritten) rules for how things “really” get done.</td>
<td>Manager</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Direct Reports</td>
<td>4</td>
<td>75</td>
<td>31.8</td>
</tr>
<tr>
<td></td>
<td>Peers</td>
<td>4</td>
<td>85</td>
<td>45.5</td>
</tr>
<tr>
<td></td>
<td>Self</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Manager</td>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Direct Reports</td>
<td>4</td>
<td>90</td>
<td>28.4</td>
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<td></td>
<td>Peers</td>
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#### Perspective: Truth (Inquiry)

<table>
<thead>
<tr>
<th>Question</th>
<th>Population</th>
<th>Count</th>
<th>Avg</th>
<th>Spread</th>
</tr>
</thead>
<tbody>
<tr>
<td>I encourage people to question the reasoning and assumptions that motivate my decisions without fear of retribution.</td>
<td>Self</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I encourage people to question the “status quo” and ineffective ways-of-working without fear of retribution.</td>
<td>Manager</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Direct Reports</td>
<td>4</td>
<td>65</td>
<td>60.9</td>
</tr>
<tr>
<td></td>
<td>Peers</td>
<td>4</td>
<td>85</td>
<td>45.5</td>
</tr>
<tr>
<td></td>
<td>Self</td>
<td>80</td>
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<td></td>
<td>Manager</td>
<td>80</td>
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<td></td>
<td>Direct Reports</td>
<td>4</td>
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<td>71.1</td>
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<tr>
<td></td>
<td>Peers</td>
<td>4</td>
<td>75</td>
<td>31.8</td>
</tr>
</tbody>
</table>

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OTI Reliability and Validity

• Cronbach’s Alpha Reliability Coefficients for the OTI scales
  • Integrity: 0.86
  • Truth: 0.91
  • Power: 0.78
  • Competency: 0.87
  • Teamwork: 0.92
  • Communication: 0.90
  • Self-Awareness: 0.95
  • Self-Management: 0.93
  • Effective Listening: 0.97

• Test-Retest Pearson $r$ expected to be in the .80 range
• We monitor Sampling Error and Coverage Error to keep validity as high and possible, given value-added to client
Presentation Overview

• Should we transform?
• Case-study and underlying models and assumptions
• Overview of how the OTI™ works
• Data structure, scoring patterns, reliability, and validity
• Administering the OTI
• Reporting on results
• Questions and discussion
Administering the OTI

- Client notifies participants about purpose…
- Participant Excel file defines data structure
- Cloud-based platform with 24X7 access
- The “nag factor” to get a good response rate
- OTI results are often integrated with an assessment of a much larger scope…
Presentation Overview

- Should we transform?
- Case-study and underlying models and assumptions
- Overview of how the OTI™ works
- Data structure, scoring patterns, reliability, and validity
- Administering the OTI
- **Reporting on results**
- Questions and discussion
Reporting on Results

• A complex & subtle negotiating process of:
  • Reporting to the client (person who brought you in)
  • Reporting to the client system

• System-generated report
• Written summary report of observations about data
• Many clients will go right to the recommendations
Reporting to the Client

• The client always has the right to be in charge of what happens to them
• Protecting the client from themselves
• Two hour debrief with client alone
• How will others “interpret” the report…?
• Give client Levels 2 and 3 data only if they ask for it
Reporting to the Client System

- Self-ID to establish the “face-validity” of data
- Establish the context – meaningful conversation from the L-H Column (need for change and trust)
- Help them evaluate the validity of their perceptions
- Create a sense of urgency around a credible and compelling business-case
- Drive responsibility down to middle manager and supervisor levels
- Take personal responsibility for being proactive, not reactive about organizational transformation
Client Self-ID with OTI Graph

- Self-ID using the OTI diagram from Point A to B to explain the business case
- Overview of the 39 items perspective-by-perspective
- Which of the areas will be most problematic?
  - Basic Assumptions (Integrity and Truth)
  - Interpersonal and Group Dynamics (Power and Competency)
  - Interpersonal and Group Dynamics (Teamwork and Communication)
  - Emotional Competencies (Self-Awareness, Self-Management, Effective Listening)
- The discussion should focus around the underlying (root) causes of performance issues
Client Self-Analysis of Data (Teach, Show, Ask)
Follow-Up Discussion with Client

• Recommendations for the client to “consider”
• Many follow-up meetings follow a typical pattern
  • Initial defensiveness
  • Debate within the group about data and recommendations
  • Talking in the abstract about problems-issues in the industry
  • Discussion on how they compare to other organizations
  • Acceptance of findings and recommendations
• Hold a follow-up meeting the next day so the group has time to “sleep on it” and anger and defensiveness don’t fester
Model the Behavior You Describe

- You can’t lead people further than you’ve been…
- The OD presenter should demonstrate that they:
  - Do not fear anger, defensiveness, and hostility (intrapsychic resistance, transference, and countertransference)
  - Stand confidently for findings-recommendations despite differences in PICR
  - Are willing to be cross-examined about assumptions and what was learned
  - Are willing to be appropriately corrected and modify their analysis and conclusions if factual inaccuracies and/or new data are found
- Remember that an inability to recognize and effectively deal with countertransference compromises your 3rd party objectivity
Questions and Discussion
Please Complete a Survey Before You leave!

Your feedback is greatly appreciated.

Thank You!