

Day 1: Handouts for People Analytics & Change Masterclass

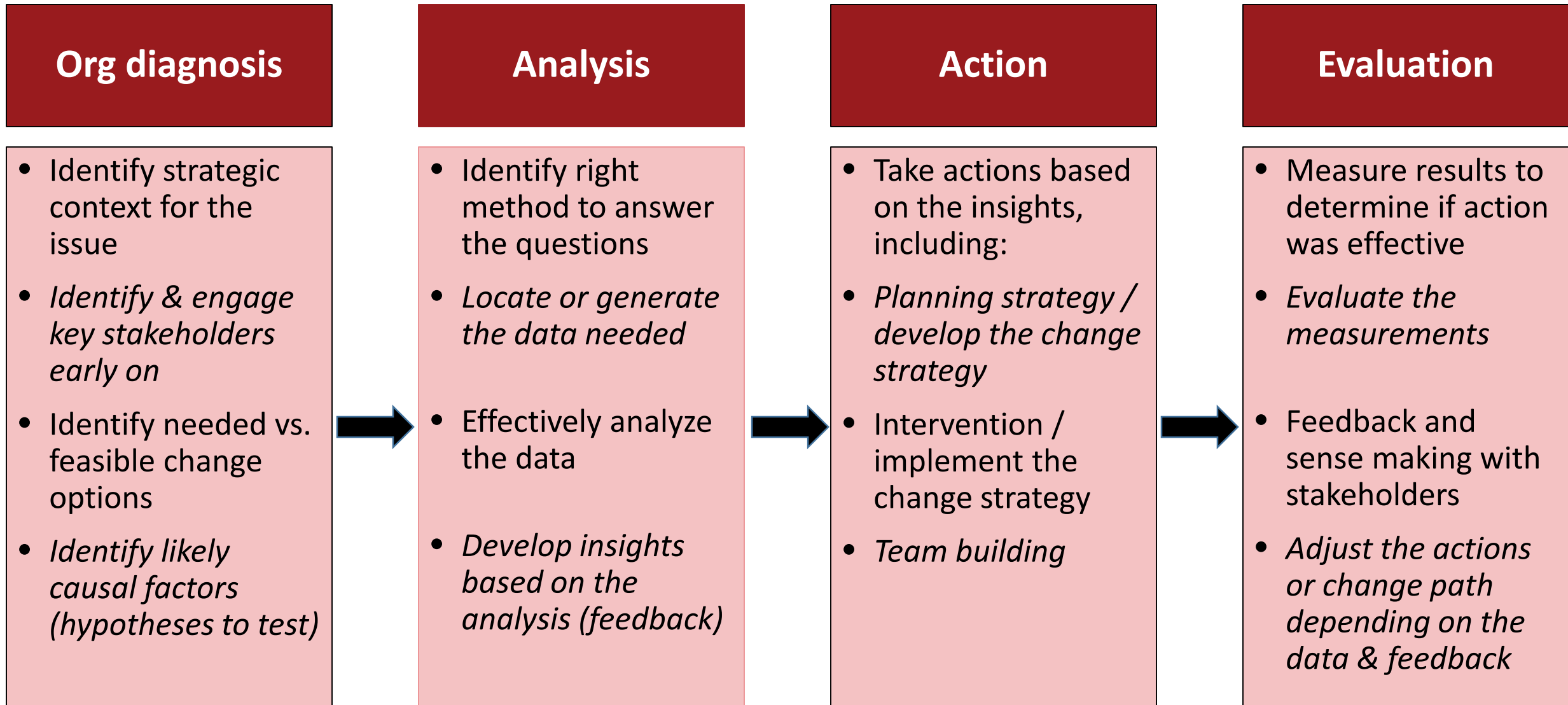
Analytics vs. OD processes

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Analytics process	OD process #1	OD process #2
1. Ask the right question	1. Initial diagnosis	1. Organizational diagnosis
2. Identify right methods to answer the questions	2. Data collection	2. Identification of alternative strategies
3. Locate or generate the data needed for answers	3. Data feedback	3. Development of the change strategy
4. Analyze the data	4. Planning strategy	4. Implementation of the change strategy
5. Develop insights based on the analysis	5. Intervention	5. Measurement
6. Take action based on the insights	6. Team building	6. Evaluation
7. Measure results to determine if the action was effective	7. Evaluation	7. Feedback

End to end rigorous process: OD + Analytics

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Information gathering and sense making

Information gathering and sense making

		Conversations & meetings (1-on-1, team)	Systematic interviews and focus groups	Evaluate existing data	Statistical analysis of multivariate data
Org Diagnosis	Exploratory data analysis: areas for potential improvement				
	Identify the strategic context for the issue				
	Identify & engage key stakeholders early on				
	Identify needed vs. feasible change options				
	Identify likely causal factors (hypotheses)				
Analysis	Identify right method to answer the questions				
	Locate or generate the data needed				
	Effectively analyze the data				
	Develop insights from the analysis (feedback)				

Information gathering and sense making

		Conversations & meetings (1-on-1, team)	Systematic interviews and focus groups	Evaluate existing data	Statistical analysis of multivariate data
Action	Take actions based on the insights				
	Planning strategy / develop change strategy				
	Implement the change strategy				
	Team building				
Evaluation	Measure results: was the action effective				
	Evaluate the measurements				
	Feedback, stakeholder sense making				
	Adjust actions, change path based on feedback				

Tool #1: Organization Assessment

Tool #1: Organization Assessment – part one

Key Questions	Key Considerations
★ What sources of information already exist?	★ Examples of existing data include a team’s strategy documents, progress reports, retention rates, operation plans, scorecard, P&L, or the team’s employee survey results.
★ Consider what drove the decision to conduct an assessment. How complex are the issues you’re expecting to uncover?	★ For example, more complex issues likely require a collection approach that allows for more dialogue, such as focus groups or interviews.
★ Who is the audience for your assessment? Do you need a representative sample of partners? Do you need subject matter experts? Do you have the right mix of tenured and recent hires? Is your audience big enough that you can identify themes?	★ Involve the right people in the assessment to get the best data.
★ What cost or time is involved?	★ Different collection strategies provide different level of information and require different levels of analysis. Be mindful around pay requirements for hourly employees; time worked must always equal time paid.
★ How sensitive or confidential is the situation?	★ This could change who you involve and how you communicate it.

Tool #1: Organization Assessment – part two

<i>Method</i>	<i>Type of Data Obtained</i>	<i>Time Commitment</i>	<i>Cost</i>
Surveys	<ul style="list-style-type: none"> Quantifiable (rated) information Can also provide contextual or descriptive information through open-ended questions 	<p>Requires minimal time commitment from participants</p> <ul style="list-style-type: none"> Keep questions as focused as possible (<20 is ideal) Time required for open-ended questions varies Recommended total survey time to complete is 10 minutes or less Analysis requires compiling survey responses, and identifying themes and core issues; if planning to do textual analysis, leverage technology solutions if possible. 	<p>Low-cost solutions exist</p>
Focus Groups	<ul style="list-style-type: none"> Rich and descriptive information (i.e., in-depth discussions of issues, ideas, concerns) Data represents broad sample 	<p>Require extensive time for data collection and analysis</p> <ul style="list-style-type: none"> Each group should last 90 minutes and is best run with two people – a facilitator and note-taker Analysis requires reviewing notes and identifying themes and core issues 	<p>Higher cost</p> <ul style="list-style-type: none"> Labor costs 8-10 people per session
Interviews	<ul style="list-style-type: none"> Rich and descriptive information (i.e., in-depth discussions of issues, ideas, concerns) Data represents individuals 	<p>Requires extensive time for data collection and analysis.</p> <ul style="list-style-type: none"> Use assessment questions for interviews Analysis requires reviewing notes and identifying themes and core issues 	<p>Higher cost</p> <ul style="list-style-type: none"> Labor costs Multiple interviews

Tool #2: Design Criteria

Tool #3: Sample Change Story Clinical Services Career Framework

Tool #4:
Sample Change Story
MedVet Employee Handbook

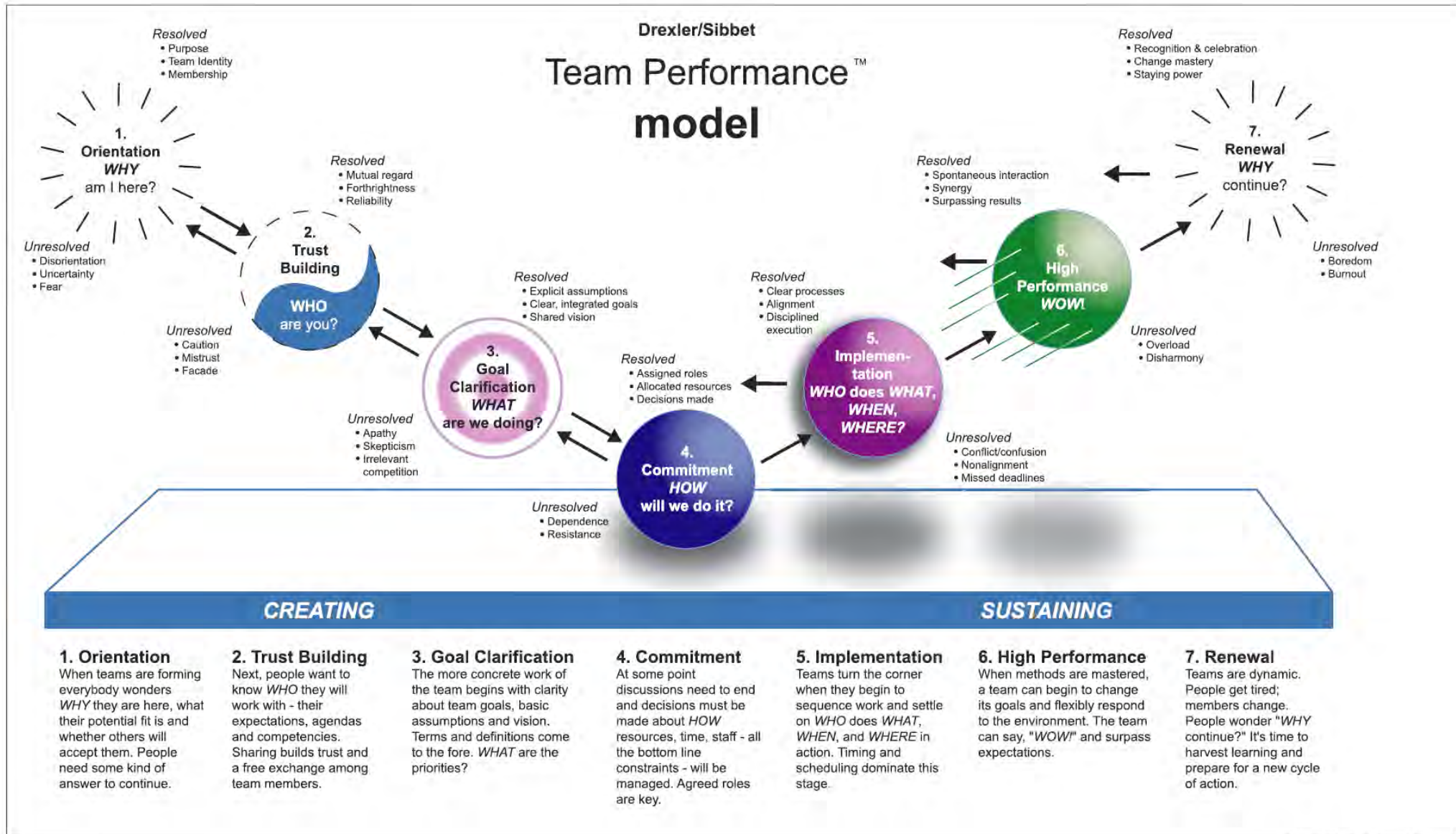
Tool #5: Change Story Worksheet

Day 2: Handouts for People Analytics & Change Masterclass

Tool #6: Change Stakeholder Mapping

Tool #7: Team Performance Model

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9.0 TP Model © 2000 Allan Drexler & David Sibbet

Tool #8: Team Performance Assessment

Tool #9: Evaluation – Review Team Progress

Tool #10: Evaluation – After Action Review

Tool #11: Change RACI and Comms

Tool #12: Employee Profiles

Tool #12: Hourly Partner Segment Profiles

