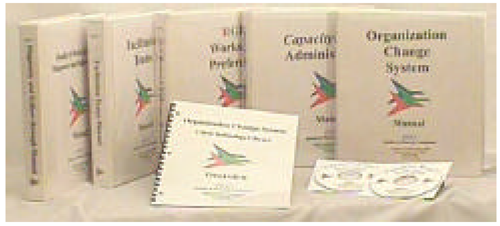
Organization Change System
Client Technology Library - Outline



Cover Letter
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Organization Change System
Client Technology Library

A. Overview.

1. The Library. The Organization Change System - Client Technology Library consists of five cross-referenced manuals and resources located at our Leadagement Technologies Organization Development Information (LTODI) Internet site. This publication is a guide to all these resources so users can optimize the application of this comprehensive Organization Change System. This publication has three levels: broad Manual descriptions, and more detailed descriptions of the materials behind each Tab in those manuals, and even a "keyword" level that provides deep insight into the contents of each Tab. Also listed in the Tab sections are the Attachments referenced in the text of that Tab. Special Learning Events are scheduled on a regular basis so that users can attend no-cost training on how to use the ***CapacityWare*™** software and Organization Change System optimally.

2. Library Distribution. It is recommended that at least one full set of tailored library documents be maintained at a central location in the client organization. Whoever is the client internal responsible party (normally someone in the HR or OD office) will maintain the library and see to it that other key principals in the change effort have those Manuals or copies of chapters as needed. The following distribution is recommended:

a. Organization Change System - Client Technology Library - Overview and Index. Any supervisor or above, and all members of Chartered Teams.

b. Organization Change System Manual. Sponsor, Client, Direct Reports, Members of Chartered Teams, Sponsors of Chartered Teams.

c. *CapacityWare*™ Administration Manual. All individuals with a Full Service version of ***CapacityWare*™**.

d. RGB WorkStyle Preference Manual. All Management Personnel.

e. Facilitation Teams Manual. Members and Sponsors of Chartered Teams. If internal certification is undertaken, all those certified must have a copy of the Manual.

f. Diagnostic Report and Follow-through Manual. Sponsor, Client, Direct Reports, Sponsors and Members of Chartered Teams, and those with independent strategy formulation authority.

3. Special Terms. Most of the terms in this material are easily understood. Five terms may need additional definition. At our Internet site there is an extensive Glossary that further defines many terms we consider being unique to the organization development domain.

a. Organization Change. The deliberate system used to make improvements in the capacity of an organization to find and fix its own limitations that impede optimum performance and productivity. The necessity for change may be prompted by anything that could place the organization in jeopardy: falling profits, declining customer service, insufficient talent or skill among the workforce.

b. Discretionary Work. All employees have the option to withhold valuable contributions to their work, and they do it all the time. The most classic condition surrounds problem-solving scenarios. Even when asked for ideas that will improve performance, many employees will remain silent. This and other conditions represent the broad area of discretionary work that is deeply embedded in an organization's culture and impacts capacity. Withholding of discretionary work is not necessarily the direct result of the specific organization within which the employee currently works.

c. Cultural Capacity. The discretionary effort of a workforce directed at achieving the organizations ultimate purpose is either limited or expedited by the informal rules of people as they work together toward that common purpose. Many organizations will try (often in vein) to adjust culture through policy development and implementation. Needed policy reform is often an ineffective attempt to correct workforce culture gone astray.

d. Instruments. The means by which data is collected; a survey, an inventory, an interviewer /examiner’s report, or an Internet form, for example. The collection of specifically designed instrumentation provides users with realistic and actionable data regarding capacity.

e. Capacity Development and Recovery. When capacity is low for any reason, the organization must be concerned with developing new capacity - capacity that never existed. Secondary initiatives can be undertaken to recover capacity that may have existed at one time, but has been eroded through a variety of conditions that may not have even involved the current organization. Workers often drag "baggage" from previous assignments that impact current work for a long time. If a former supervisor has performed in a less than expected way, the new employee will form opinions of the new supervisor based on that undesirable model.

4. Technological Resources. The Client Library contains this Overview and Index as well as five 3-ring binders covering specific topics necessary for a successful organizational change initiative. These materials form the foundation and provide sufficient guidance for clients that already have seasoned organization development resources. In many cases, however, greater depth and supplemental guidance may be required. The resources described below extend the knowledge-base to assure the best possible implementation of change strategies.

a. Recommended Reading. The ***QWLC*** library is an extensive collection of publications directly related to this specific change management system. Each of the ten Stages has at least one publication recommended for further research. This recommendation is listed within Paragraph C of each Stage guidance.

b. Agendas. In many of the paragraph titles within each Tab, is an Event indication (the word Events, or Events follows the paragraph title). This means that at least one Event Agenda is provided as guidance for the initiative described. The Agenda and ancillary materials can be accessed at our Internet site using the same password provided for the basic Stage guidance contained in the Organization Change System Manual (see paragraph 5, Updates, below). Additional materials linked to the Agendas include the following:

? **Suggested Communications.** A range of materials that include e-mails, flyers, letters, and instructions may be provided as facsimiles.

? **Advanced Reading Materials.** When the Event results will be enhanced by providing invitees with advanced reading materials or links to materials, these instructions are also included as a supplement to the Agenda(s).

? **Video Clips.** In some cases, a picture is worth a thousand words. Potential video clips that will help users understand the Event more clearly may be available for viewing over the Internet.

? **Handout Materials.** During the Event, handouts may be used to improve understanding. Handouts also provide a "take away" that extends the life of participant learning.

? **PowerPoint® Presentations.** PowerPoint® presentations are available for many Events as a way of further developing the topic at hand.

c. Extended Materials. There is a section for Extended Materials available at the LTODI site. Extended Materials are standalone treatments of topics that apply to more than one Manual and are therefore not repeated in each of those publications. Extended Materials may also cover a specialized topic of interest that may not be common in all client organizations. The sequence of presentation in this overview is intentional since all Manuals are part of an interwoven systemic approach to change management; users may well have their own priority for research.

d. Special *CapacityWare*™ Software Stage Instructions. At selected Stages, there may be a need for special emphasis with ***CapacityWare*™** software. These instructions focus attention of the special part the software will play at each Stage of development as a supplement to the ***CapacityWare*™** Administration Manual.

e. Attachments. During each Stage, there are requirements that are best completed with a checklist or guide to assist the effort. Attachments lead an individual or small group through a process, the results of which are needed for the Stage (or a subsequent Stage) to be highly successful.

f. Literature for Publication. ***QWLC*** provides clients with potential literature for publication in internal media as a means of Event follow-through or preparation for change.

5. Updates. Printed materials become obsolete at some point. The rapid rate of change and technological advances render even the most skillfully written material less effective with the passage of time. This system of change recognizes these issues with a procedure for updating materials and giving current holders of obsolete materials the option to update whenever they choose. If the date of materials in the 3-ring binder is older than current version data, the user may simply download a new version of whatever materials they decide is appropriate.

a. Limited License. Downloading materials is intended to replace materials in the currently "owned" 3-ring binder published and sold by ***QWLC***. It is not intended to be a means to circumvent the purchase of published materials. The limited license is therefore intended only as a replacement for already acquired publications that have become outdated due to advancements.

b. Version Information. Version information (publication date - month and year) is contained both on the Internet site at "Client Technology Library" and immediately below the copyright notice at the end of basic materials for each Tab in appropriate binders (also month and year). When the material held is older, the user is entitled to replace the current copy with a new edition.

c. Passwords. All materials are password protected. The specific password is printed within quotation marks on the same line as the month and day version date referenced above. Passwords may be changed from time to time. Registered users can obtain new passwords for any materials by requesting the new password directly from ***QWLC***.

6. Guarantee. Neither ***QWLC*** nor **LTI** guarantee the results achieved by using this system of change. Results will depend upon many variables associated with implementation that go far beyond the use of these materials. We do guarantee customer satisfaction, however, if the entire set of purchased materials and software are returned with a certificate testifying that reproduction has not occurred within 60 days for a full refund (excluding shipping and handling).

7. Testing. Testing patterns will be predicated on the three progressive levels of competence: team, organization, and systemic. Satisfactory completion of testing may result in licensure and/or certification.

a. The Application as a "Test" of Readiness. Completing the application process is a test of the applicant's readiness to engage in the necessary learning to be successful as a principal change agent for a large complex organization. The application process lays a foundation upon which participants develop their performance so that success can be predictably achieved.

b. Understanding of Materials. Before participants are required to engage client organizations, they will be tested to determine their understanding of the materials that support this system of change. When understanding is acceptable as determined by test scores, the participants will engage in client-based scenarios that permit the demonstration of acceptable performance.

c. Demonstration of Techniques. Specific assignments are provided for participants who have passed the test requirements. These assignments are event designs that, when implemented successfully, will yield positive organizational changes in preparation for more significant challenges. Testing will be comprised of written and/or video responses to the engagements completed.

d. Measurement of Organizational Impact. The final assessment of success will be the collection of data from the organization element(s) subjected to change technologies to determine the shift in capacity. In the final analysis, every step taken could have been perfect without manifesting expected improvements. In this case, the change agent team is not lost for acceptable alternatives. An evaluation of what happened based on the research of latest techniques might well yield an improved design that will yield improved organization capacity.

B. Manual Descriptions.

1. Organization Change System (OCS) Manual. The OCS is a "big picture" of the 10-Stage Cycle of organizational change management that will result in enhanced cultural capacity for an organization. The Stages are presented in the appropriate chronological sequence to achieve the fastest and most stable enhancements. At each Stage, the system is tailored for the specific client organization. *The "who, what, when, where, why, and how" of this system are of equal importance. Following the right process with the wrong people involved will produce less-then-optimum results, for example.*

47,580 words with 40 Attachments.

2. *CapacityWare*™ Administration (CWA) Manual. The software that provides the specific structure needed to optimize change initiatives is ***CapacityWare*™**. This software product helps manage the efforts of all those involved in the change effort to enhance a coordinated (effective and efficient) approach. Although many may have access to the software, one individual will be the central "owner" of ***CapacityWare*™**. This individual is often referred to as the ***CapacityWare*™** Administrator.

17,990 words with 27 Attachments.

3. RGB WorkStyle Preference (RGB) Manual. There are five levels of application for the **RGB** Technology that measures and develops individual, team, workgroup, network, and organizational performance. The results of **RGB** WorkStyle Preference Inventories foster the recovery of lost capacity or development of new capacity based on the tangible value of the talent people add to their discretionary work.

17,513 words with 10 Attachments.

4. Facilitation Teams (FT) Manual. Members of teams chartered by the organization's leadership work to increase capacity so that the organization's purpose is achieved. This foundational publication provides the guidance required for that work to be the highest possible influence on developing or recovering workforce capacity. It includes techniques for supervisors, managers, facilitators, and members of the workforce to achieve those higher levels faster with less effort. It is not a substitute for developing traditional facilitator skills.

29,893 words with 28 Attachments.

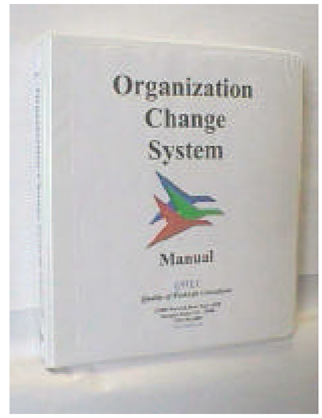
5. Diagnostic Report and Follow-through (DF) Manual. Each cycle of the 10-Stage Organization Change System will produce diagnostic documents as well as follow-through documentation that allow key decision-makers to know what actions are being taken to correct capacity deficiencies. These manuals are distributed initially to pre-identified individuals across the organization along with diagnostic results (usually workforce survey results). As corrective actions are taken, additional documents are added to the Manual that provide an ongoing accounting for progress (or lack thereof).

18,612 words with 16 Attachments

*word count excludes Attachments, illustrations and Internet resources.

C. Tab Overview Descriptions for Each Manual.

1.0 Organization Change System Manual. The 10-Stage Organization Change System cycle guides the organization members through a long-term repeatable process that shifts the culture and capacity to increasingly higher levels of productivity and performance. This Part describes each of the ten stages in detail and directs the user to Internet resources and/or other Manuals in the Client Technology Library as needed at each stage.



1.1 Tab 1 - Preliminary Orientations and Clarity Meeting(s). The first cycle begins with orientations and meetings designed to clarify what will happen at each stage and make decision that will tailor activities to the specific needs of the organization. Subsequent to the first cycle, this Stage is used to update participants on what has transpired to sustain continuity. ***CapacityWare*™** is installed early on so that tracking attendance and delivering presentations to selected desktops can begin (See also the ***CapacityWare*™** Administration Manual). ***CapacityWare*™** is used throughout this process cycle to gather and analyze information pertaining to the change effort. Contents of Tab 1.1 are listed below:

Overview
Transition from Marketing to Intervention.
Key Initial Meetings
Theme Development and Integration
Leadership, Management, and Supervisory (LMS) Orientations
Workforce Orientations
Event Evaluations
- Attachments:
  - Pre-engagement Assessment
  - Attendance and Synopsis Worksheet
  - Contracting Concerns
  - Decisions Worksheet
  - Organization Demographic Worksheet
  - Orientations Worksheet
  - Event Evaluations

1.2 Tab 2 - Instrument Package Development and Distribution. To be certain that change efforts proceed in a responsive way to the needs of the workforce and other stakeholders, a front-line team designs instruments (normally the initial instrumentation is a workforce survey). Data collection instruments are then distributed across the organization. The Survey Design Team may also form the foundation for selecting team facilitators who will undergo preliminary training on how to help change the organization culture once survey results are received

(See also the Facilitation Teams Manual, and the **RGB** WorkStyle Preference Manual). Contents of Tab 1.2 are listed below:

The Instrument Design
Demographics, Instructions, and Cover Letter
Package Finalization
QWLC Support Production and Setup
Develop Best Practice Technology
Collecting Baseline Source Documentation
Attachments:
Team Demographic Distribution Worksheet
Instrument Development Checklist
Data Collection Package Readiness Worksheet
Developing Best Practice Documentation
Baseline Source Documents Worksheet

1.3 Tab 3 - Data Collection, Data Entry, and Validation. Completed instruments converge on a central processing location where input and validation of all responses occurs. ***CapacityWare*™** is used to process all instruments and prepare data displays that attest to results. Contents of Tab 1.3 are listed below:

Conducting Interviews
Stimulating Instrument Submissions
Collecting Prior Assessment Data
Receiving Data
Sorting Instrument Returns
Initial Review, Logging, and Client Demographic Receipts
Data Entry
Data Set Validation and Final Sanitization
Attachments:
Interview Notes
Daily Diary Worksheet
Instrument Receipts Log
Daily Returns Report
Individual Feedback Log
Data Certification

1.4 Tab 4 - Analysis, Synthesis, and Report Development. The survey results are used to develop strategies and create a report that will be fed back to the organization (See also the Diagnostic and Follow-through Manual). Contents of Tab 1.4 are listed below:

Preparing to Write the Diagnostic Report and Follow-through Manual
Considering the Approach Strategy and Client Guidance
Strategy Development
Using the Diagnostic Report Template - Writing the Report

Preparation for Feedback
- Attachments:
  - Resource Document Checklist
  - Report Preparation Worksheet
  - Strategy Scope Worksheet
  - Final Authorities to Advance
  - Feedback Preparation Checklist

1.5 Tab 5 - Organization Feedback and Team Recruitment. Organization feedback begins with a presentation of results to the leadership, front-line design team, management, and all members of the organization over a one or two-day period. All results are available for everyone to see. Those who are interested in becoming involved in helping the organization make performance improvements will be recruited primarily during this Stage. Additional opportunity will present itself during the next two Stages as well. Contents of Tab 1.5 are listed below:

Sponsor/Client Feedback
Data Collection Team and/or Survey Design Team Feedback
LMS-I Feedback
Data Fairs and/or Breaks
Individual Feedback Distribution Generic and Confidential
Recruiting Team Members
Advanced Materials in the Diagnostic Report & Follow-through Manual
- Attachments:
  - ***CapacityWare*™** Update/Upgrade Checklist
  - Team Recruitment Register

1.6 Tab 6 - Coaching Lab and Planning Session. Following the initial feedback, organization leaders, managers, facilitators, and those who have volunteered for teams will attend a special session. This session will create the priorities and scope of each initiative to be undertaken by teams and/or management action. At this and subsequent Stages, holders of the Diagnostic Report and Follow-through Manual will be provided with periodic updates. Contents of Tab 1.6 are listed below:

Process Overview
Reviewing the Data
Setting the Follow-through Parameters
Creating the Focus - Developing the Initial Plan
Planning for Team Activities
- Attachments:
  - Item Resolution List
  - Team Follow-through Plan
  - Priorities List

1.7 Tab 7 - Team Formation and Team Culture Development. Teams are formed to make and help implement recommendations that solve organization problems. Specific events are designed to strengthen the fabric of the team before problem-solving work begins. A strong team will survive the stressful turmoil associated with this kind of work. The **RGB** Technology introduced in Stage 2 is used heavily throughout this Stage as well. Contents of Tab 1.7 are listed below:

Identifying and Managing the Team
Establishing/Negotiating the Charter and Orientation as to Scope
Developing and Sustaining a High Yield Team Culture
Team Transition and Reformations
Measuring Team Performance
  Attachments:
    Team Formation Development Checklist

1.8 Tab 8 - Development of Recommendation Design and Approval or Adoption. Teams will develop and present their recommendations for overcoming the deficiencies that surfaced in diagnostic results. Some team members will be further tasked to oversee implementation of those recommendations that have been accepted. The extent of oversight will vary. Contents of Tab 1.8 are listed below:

Managing Team Progress
Developing Systemic Recommendations
Preparing Implementation Timelines
Obtaining Authorities and Approvals
Pre-implementation Organizational Preparedness
  Attachments:
    Recommendations Template

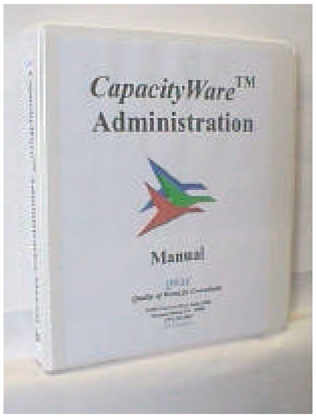
1.9 Tab 9 - Implementation and Measurement. As recommendations are implemented, care is taken to measure the impact on capacity. As necessary adjustments are made, performance will be tracked until expectations are met. Contents of Tab 1.9 are listed below:

Implementation of "Systemic Initiatives Set" Recommendations
Monitoring Implementation
Monitoring Parallel Processes Upon Implementation
Revisiting Implementation
Documenting the Implementation
  Attachments:
    Budget Implications Memorandum
    Implementation Log
    ROI Incident Report
    Innovations Register

1.10 Tab 10 - Evaluation, Adjustment and Closure. By using evaluation information collected in ***CapacityWare*™** the entire cycle (Stage 1 through Stage 10) will be examined to make further tailoring effective so that the next and subsequent cycles will gain momentum and increase effectiveness. Contents of Tab 1.10 are listed below:

Comprehensive Cycle Evaluation
Create Best Practice Literature/Documentation
Update Technology
Publish Learnings/Advancement - Expand the Market
Create Closure
Client Cycle Evaluation
  Attachments:
    Cycle Conclusion Assessment
    Technology Update Summary
    Client Cycle Report

2.0 *CapacityWare*™ Administration Manual. The 10-Stage Organization Change System outline above relies heavily on ***CapacityWare*™** software beginning at Stage 1 to keep records that help track progress. Although one person will have complete control over the system, many other users may also have access if a network configuration is installed. The software can be installed by the client organization, or a ***QWLC*** Consultant can undertake installation. The software works with MS Office® suite, which must also be available to the user.



2.1 Tab 1 - Navigating the Main Menu. The Main Menu provides the single gateway to all features of the software in a simple "point and click" manner. This includes a "Visit" option that takes the user directly to the LTODI.com information resource (See Part D of this publication). Contents of Tab 2.1 are listed below:

Overview
  Registration, Licenses, Scoring.
Top Menu Bar
  QWLC, Client, Date, Minimize, Maximize.
Pull Down Menus
  File, Edit, Best Practices, Instruments, Activities, Financials, Reports, Presentations, Visit, About.
Active Panels
  Current Client, Selected Instrument, Respondent Name.
Action Buttons

Login, Select Instrument, Take Instrument (Survey or Inventory), Review Instrument Results, Exit.

Summary

Change Management System, Installation and Service, Configuration, Partners in Innovation.

2.2 Tab 2 - Managing Respondent Data. The first major module in the program to be engaged is the management of respondent data - this keeps track of everything from attendance and participation, to **RGB** Technology results. Surveys and other diagnostics, like Multi-source Feedback (360^o Feedback) can also be accessed by individual name, unless the data entry has been protected through anonymous input features. Contents of Tab 2.2 are listed below:

Overview

Locating and Working with a Respondent Records

Selecting a Respondent, Adding a New Respondent Record, Deleting a Respondent Record, Filtering Respondent Records.

Completing Demographics and Other Fields in a Respondent Record

Name, Real Name, Pseudo Name, Anonymous Name, Anonymous or Project Name, Other, DR, DG, DB, Duty, Group, Team, D1 through D10, E-mail, Notes, Add Demographics, Save User, Cancel.

Confidentiality

Uses for Respondent Data

Summary

Personnel Actions, Use of Real Name, Verification of Data.

Attachments:

Respondent Worksheet

Demographics Worksheet

Authority to Remove Anonymity

2.3 Tab 3 - Creating Instruments. If pre-designed instruments are insufficient (and they frequently are), the user can select from over 1,000 items in a pool of pre-categorized survey and metric items. The creation and printing of instrumentation is easy using these "point and click" features. Contents of Tab 2.3 are listed below:

Overview

Instruments, Style Inventories, Workforce Surveys, Metrics, Multi-source Feedback (Reverse Feedback), five simple rules to create items, scale.

New Survey

Initial Item Selection, AC - Equipment, AS - Alignment, ES Environment, IN - Information Flow, LA - Facilities, LM - Leadership and Management, OR - Organization Structure, PE - People, SK - Skills, TE - Technology, Item Category Integrity, Generic Terms, Wild Card Items, Category Labels, Category File Name, Survey Description, Survey Subclass.

Edit Survey

Item Word Editing Window, Selecting a Survey Item, Adding an Item, Done.

Create Tailored UHS Labels

End Comments

Select Survey, Create Open-ended Question, OK, and Cancel.

Preparing the Survey for Reproduction

Printing, Demographics.

Summary

Maintain the Integrity of the System (in creating items within a set category), Expand the Use of Surveys as a Means of Data Collection, 360 Degree Feedback, Project Metrics, Link Data Collection with Remediation Strategies, Integration of ***CapacityWare*™** into decision-making Routines.

2.4 Tab 4 - Engaging Best Practices. ***CapacityWare*™** features over 11,000 potential Best Practices that are (or can be) linked directly to instrumentation results. Users are never lost for ways to make improvements that are surfaced in data collection efforts. Some options are preset, others are under the total control of the client organization (See the OCS Manual, Stage 2). Contents of Tab 2.4 are listed below:

Overview

Literature, Event and Initiative Design.

Adding and Editing Sources.

Reference ID, Reference Text Window, OK, Cancel.

Adding Best Practice Extracts

Element (UHS elements, AC - Equipment, AS - Alignment, ES Environment, IN - Information Flow, LA - Facilities, LM - Leadership and Management, OR - Organization Structure, PE - People, SK - Skills, TE - Technology, Item ID, Element Score, Day, Page Number, Reference, Quote or Extract, Perspective, Action, Add, Cancel.

Searching for and Editing Best Practice Extracts

File, Search Filters, Enter Search Word, Search By, Where [Options - any or all], Filter by - Element, Filter by - Reference, Quote or Extract Selection Window, Fields Already Described Above.

Accessing Best Practice Suggestions

Black Mean Line, Red Line, Smart Tailoring Links, UHS Elements, Review Element Questions.

Using Best Practices as a Method of Capacity Development and Recovery

File, Quote Element Score, Previous or Next, Three Viewing Windows, Close, Buy Book.

Summary

Keep Best Practices Relevant to the Organization's Needs, Assure Best Practice Links to Low-scoring Survey Items, Engage Best Practice Literature as a Supplement to Organizational Learning.

2.5 Tab 5 - Processing Instruments. Some instruments (**RGB** Inventories, or Project Metrics, for example) are processed locally. Other instruments where confidentiality and anonymity are a paramount concern (Multi-rater Feedback, or workforce surveys, for example), are processed by ***QWLC*** or some other local affiliate. Results, once sanitized according to pre-determined limits (established by Events described in the OCS Manual, Stage 1). Once input is complete, results will be electronically installed on client systems as a routine update during Stage 5 (See the OCS Manual). Contents of Tab 2.5 are listed below:

Overview

RGB Inventory, forced choice, No Response, Anonymous Record.

Instrument Selection

Filters, Instrument Selection.

Respondent Selection or Creation

Processing **RGB** 's

Limited Input Options, Field Advance, Inventory Item Advance.

Processing Surveys

Item Default, Scale Window, default "N", Comment Action Button, Back and Next, Exit, End of Survey Processing Options.

Summary

2.6 Tab 6 - Displaying Results. All results can be displayed by client software whether installed as Readers only or Full Service versions. This enables client on-site Coaching Labs to be conducted by internal facilitators, when appropriate. Contents of Tab 2.6 are listed below:

Overview

On-screen, Multi-screen Options.

Display Template Options

Individual and Composite **RGB** Graphic Profile, Comparison **RGB** Graphic Profile, Unifying Human Systems Radial Graphic, Trend Tower, Bar Chart, Pie Chart.

Graphic Display Template Summary

Show Relationships Quickly and Dramatically, Show Detailed Systemic Data Through Powerful Summary, Show Priorities that Demand Top Layer Attention, Show Item-by-Item Details with Descriptive Narrative.

Selection Criteria and Display of Individual Results

One person, Versus Task **RGB**, Multiple People, Show Demographic Descriptions, Icons, Close.

Selection Criteria and Display Comparisons

Selection Criteria and Display of Composites and Composite Comparisons

File, Instrument, Respondent, Search Criteria, Enter Date Range, Advanced Demographics, Include Respondent in Group, Include Updated Items, Filter by **RGB**, Include Bands, Plot [UHS Template Overlay Only] Options, Pick Items, Search Action Button, Search Results, Action Buttons Display Icons.

Summary

Show Attributable Individual Data Only with Permission, Develop Dialog that will Bring Number to Life, Let the Data Be the Guide Needed to Create Priorities, Present Data in Human Systems Terms, Post and Distribute Relevant Results Frequently.

Attachment:

Associate List

2.7 Tab 7 - Managing Activity Records. ***CapacityWare*™** is able to track follow-through activity when Events are logged into the system. When the Attendance module is used in conjunction with the Event module, records of participation can readily be reviewed, and individual "transcripts" can be provided to those who participate (or those who are invited to participate but do not). Contents of Tab 2.7 are listed below:

Overview

Upcoming and Past Events Selection Screen

File, New Event, Delete and Event, Make a Report, Edit, Event Details, Documentation, Invite Attendees (or Take Attendance after the Event), E-mail (email) Notice, Additional Post Event Fields, Add, Up-coming, Past, Archive, Client Filter, Date Range, Consultant Filter, Event Type Filter, Event Number - Pull Down Menu, Find - Details, Refresh.

New Initiative or Event Record

Event Name, Location, Event Design, Start Date, End Date, Start Time, End Time, Lead Facilitator, Additional Facilitator, In-Room Support/POC, Sponsor, Add to Team, AutoFill, Handouts, Models, Technology Manuals, Add a Series Map, Handout, Model, or Technology Manual, Clients/Groups, Register a Client/Group, Fees, Direct Costs, Indirect Costs (non-reimbursable), Expected Attendance, Link-Lineage, Link-Data Foundation, Save Changes, Cancel..

Event Documentation

Design/Agenda, Data Foundation, Event Lineage, LMS Information, Best Practices, Participant Comments [and score], PRE/POST Requirements, Technology Suggestions, Best Practice Documentation, Notes.

Attendance

Select a Client/Group, Select Attendee, Add Group, Group Window, Add New, Save, OK.

Summary
Accountability, Access, Accuracy, Acceptance.
Attachment:
PRE/POST Event Requirements Protocols

2.8 Tab 8 - Working with Financials. A variety of financial records are available to the user. The most important purpose of these records is the periodic computation of return-on-investment as a decision-making tool. Contents of Tab 2.8 are listed below:

Overview
Recovering Capacity, payroll, non-profits, value.
Event-based Financials
Estimating the Cost of Lost Capacity
Survey, % Return, Payroll, Employees, Average, Demographic, Sub-demographic, Survey Default, Computations, Average, Complexity, Loss, Time, Interpersonal Links, Prime Culture Sets, Scenarios, Column - Bands, Column - Bands %, A-B-C Aggregate (mid-column), Column - % Loss, Column Loss, Total, Total Loss, Done.
Return on Investment of Capacity Development and Recovery.
Client, Group One and/or Group Two Items, Survey, Start and End, Mean, Demographics, Select Demographics, Source Data File, T Respondents, Matching, Allocations, Payroll, Direct Costs, Other Costs, Memo(s), Total Costs(s) and Total Fee(s), Direct Costs, Other Fees, Cost Allocation Column, Cost/Axis, Fee Allocation, Fee/Axis, Adjust Allocation(s), Point Spread, Cost/Point, Gross ROI, Total Costs and Fees, Net ROI, ROI %, Compute, Print, Close.
Summary
Methodologies Used to Calculate ROI, Incident Method, Pre/Post Loss Differential, Pre/Post UHS Calculations, Importance of Documentation, Learning What Works.
Attachment:
Total Compensation Memoranda

2.9 Tab 9 - Running Reports. Numerous reports are available to the user. Some are for use with the client data. Other reports are for the internal use of the ***CapacityWare*™** Administrator as tools to keep the system accurate and responsive at all times. Contents of Tab 2.9 are listed below:

Overview
Report Filters
Programmed Reports

Anonymous Survey Report, Client Event Participation, Comprehensive Indexes, Currency of Event Participation, Demographic Count, Demographics, Event Participation Record, Event Roster, Hand Pie, Items by UHS Category, Periodic Event Activity, QWLI Summary, Event or Initiative Record, Best Practice List, Graphic Displays.

Summary

2.10 Tab - Connecting with Web Resources. Many of the ***CapacityWare*™** features rely on Internet connectivity for optimum performance. Event designs, for example, are continuously being updated on the web so that users can have available the most current and effective alternatives. Some areas of the web site are open to the public, some are limited use for all those with active ***CapacityWare*™** systems in operation, for example, and other areas are strictly limited to specific client users. Contents of Tab 2.10 are listed below:

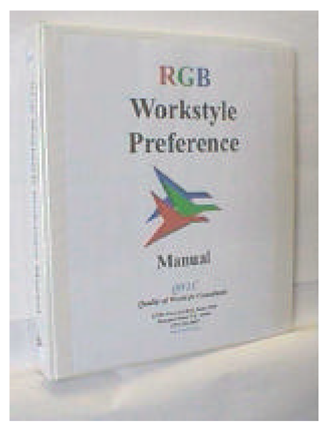
Overview

The LTODI.com Site

Gateway, About the Company and Network, Services, Training and Certification, ***CapacityWare*™** Software, ***CapacityWare*™** Literature.

Summary

Visit the Web Site Often, Download Materials, Exchange Lessons Learned and Suggestions for Improvement.



3.0 RGB WorkStyle Preference Manual. The **RGB** Inventory accurately measures one's predispositions about work. The **RGB** Technology goes deeper to make connections between individuals that work together, about the compatibility of tasks assigned to individuals and groups, and about organization culture. The underlying premise of the **RGB** Technology as it pertains to organization culture is that the interaction between people is the source of cultural capacity in organizations and that to enhance capacity, relationships must be altered in some way. There are five levels of progression in an ideal application of **RGB**. There are specific exercises that help people at each level shift beliefs that yield higher performance.

3.1 Tab 1 - Individual Predisposition. Knowing more about SELF is the focus of the first level. Self-awareness is the initial key to understanding one's fit in relationships that fulfill personal and a wide range of other social needs -

including those that are essential to effective work. Contents of Tab 3.1 are listed below:

Overview
Nature of Predisposed Talent
Red Dominant Individual
Green Dominant Individual
Blue Dominant Individual
Profile Variations
Attachments:
RGB Inventory
RGB - Individual Interpretation Guide

3.2 Tab 2 - Interpersonal Dynamics. We are not "islands" unto ourselves. Our work especially demands that we interact with others in a wide range of scenarios to fulfill the purpose of the organization(s) within which we earn our living and satisfy a host of other needs. **RGB** Technology explains the enthusiasm between some individuals, as well as the lackluster performance generated by other teaming combinations. Most importantly, it provides some potential actions that can be taken to recover lost capacity or further develop capacity among members of the workforce. Contents of Tab 3.2 are listed below:

Overview
Role Comparisons
Red Relationship Set
Green Relationship Set
Blue Relationship Set
Attachments:
RGB - Interpersonal Interpretation Guide
RGB - Interpersonal Item Comparison Guide

3.3 Tab 3 - Matching Tasks with Talents. The **RGB** Technology measures a compatibility or "fit" between one's predisposition and the tasks expected of that person on the job. The ramifications on performance and capacity are enormous, and the remedies are easily installed. The individual can complete some examination. Higher level assessments must be made by trained facilitators. Contents of Tab 3.3 are listed below:

Overview
Typing Tasks - Matching Talent
Identifying Mismatch
Remediative Strategy
General Red-Task Preferences
General Green-Task Preferences

General Blue-Task Preferences
Attachments:
RGB -MTT Worksheet

3.4 Tab 4 - Developing Organizational Culture. By comparing the symptomatic data from workforce surveys with **RGB** Technology results, users can readily determine the relationship and establish priorities for corrective action. The process of shifting an organization's culture is slow and deliberate, and must leverage the powerful undercurrent of **RGB** Technology to be accomplished effectively. Contents of Tab 3.4 are listed below:

Overview
The Balanced "Ideal" Culture
The Red Culture
Working with Red Dominant Group Culture
The Green Culture
Working with the Green Dominant Group Culture
The Blue Culture
Working with the Blue Dominant Group Culture
Unifying Human System (UHS) Links
Role Clarity
Structural Task Sets and the **RGB** Paradox
RGB Band Populations
Essential **RGB** -Linked Change Management Models
Attachments:
RGB - Culture Interpretation Guide
RED - Strengthening the Red Deficient Culture
GREEN - Strengthening the Green Deficient Culture
BLUE - Strengthening the Blue Deficient Culture

3.5 Tab 5 - Measuring and Monitoring RGB Organizational Implications. With all elements of **RGB** Technology results in ***CapacityWare*™**, the system can be used to effectively measure and monitor capacity fluctuations. Leaders can readily determine the effectiveness of current operations and make reliable forecasts about future changes before implementation. Managers and front-line supervisors will have the means available to forecast capacity loss and take appropriate measures to correct ineffective conditions. Contents of Tab 3.5 are listed below:

Overview
The Individual **RGB** Profile - Me About Myself
The Individual **RGB** Profile - Me Through the Lens of Others
The Individual **RGB** Task Compatibility Profile
Individual to Individual **RGB** Comparisons

Individual Compared to an **RGB** Composite
Group **RGB** Composites
Group **RGB** Task Compatibility Composite
RGB Composite Filtered Diagnostic Survey Result
Organization Alignment Compatibility **RGB** Profile
Individual and Composite Shifts in Capacity Over Time
Monitoring **RGB** Impact on Organizational Performance
Attachments:
RGB Monitoring Worksheet

4.0 Facilitation Teams Manual. All organizations need "soldiers" in the war to recover and develop capacity. Most (if not all) of the lost capacity comes from habits formed between people as they work together or from habits formed years ago that no longer have utility, but are none-the-less difficult to identify and eliminate. Some managers and supervisors are effective in finding and adjusting these habits, but most are not up to the challenge because they often enjoy the benefits of these habits more than any other group. Facilitators must be especially trained to do this work, and facilitation teams must be formed with members from all organization populations (highly effective to inadequately efficient).

4.1 Tab 1 - Structure. An ideal facilitation structure includes people from top leaders to workforce members who fill specific roles throughout each Change Management Cycle. The material in this Tab defines the structure and the relationship between key players. Contents of Tab 4.1 are listed below:

Accountability for Facilitation Services
Foundational Technology
Team Composition
Types of Facilitation
Attachments:
Key Roles within the Organization Change System
Five Levels of Facilitation Complexity
Suggested Organization Structure for Facilitation Teams
Technician Versus Facilitator
Extended Materials on the Web:
Roles for Realignment Technology Applications
Team Operating Guidance SAMLE

4.2 Tab 2 - Models. Numerous organization development models explain behavior and provide insight into potential capacity development strategies. Facilitators learn to observe organizational behavior through these model lenses and develop tailored strategies to implement change. Contents of Tab 4.2 are listed below:

- Models and Modeling
- Applications
  - Attachments:
    - ProZones
    - OCS - Nested Outcomes
    - **RGB** Technology
    - OMR^5 Model
    - The Work Model
    - The Basic Model
    - UHS - Unifying Human Systems Model
    - ICO - Inclusiveness, Control, Openness
    - BRES - Cultural Change Cycle
    - Smart Tailoring and Band Technology
  - Extended Materials on the Web:
    - Organization Realignment Model
    - Learning Styles and the Adult Learning Model
    - Return-on-Investment
    - Evaluation Model
    - VAK - Patterns of Influence
    - The Leadership and Management Paradox
    - Situational Pulse
    - The New Behavioral View Model

4.3 Tab 3 - Event Production. All Events (simple meeting management, to a complex series of organizational transformation events) follow a predictable and reliable routine. This material provides specific "checklist" guidance for operational change management teams. Contents of Tab 4.3 are listed below:

- Pre-event Planning
- Pre-event Production
- Transition to the Event Environment
- Conduct of the Event
- Transition from the Event Environment
- Post-event Considerations and Action
  - Attachments:
    - Post Event Clinic
    - Event Production and ***CapacityWare*™** Options
    - Use of Equipment and Supplies
    - Event Design Considerations

Smart Tailoring Band Facilitation Approaches
Recommended Event Follow-through for Supervisors
Minimum Essential Process Steps for Events
SAMPLE - Post Event Transmittal and Cover Sheet
Extended Materials on the Web:
Optimizing the Facility
Event Module Rationale

4.4 Tab 4 - Record Keeping. Records of facilitation activity are kept according to the demands of each client organization and are used to track progress toward specific outcomes. Some records lay passively dormant with ***CapacityWare*™** until needed, while other records are distributed to key decision-makers on cue to assure a responsive approach to desired change. Contents of Tab 4.4 are listed below:

Overview
Manual Records
***CapacityWare*™** Records
Internet Records - The Client C.H.A.R.T
Attachment:
Event Production and ***CapacityWare*™** Record Keeping
Event File Handling
Team Chartering Guide
SAMPLE Facilitator License
Extended Materials on the Web:
Client History and Remediation Technology

4.5 Tab 5 - Graphics. A fundamental element of successful facilitation is the ability to portray organizational conditions graphically so that they can be understood. Since approximately 60% of the general population is highly visual, graphic representation is a critical component of the Organization Change System. Contents of Tab 4.5 are listed below:

Public Recording Skills
Transcribed Group Charts
Attachments:
Transcribing Charts and Event Follow-through
Video Scene Selections

4.6 Tab 6 - Exchanges. Many capacity recovery and development Events may occur in a one-on-one or one-on-few environment. Normal group facilitation techniques are designed for a more formal group setting with about 10 to 30 participants. The Exchange environment is highly informal and designed for highly uncontrolled conditions with just a few participants (normally just one person and the facilitator). Contents of Tab 4.6 are listed below:

Purpose
Overview
Scenario Development
Conditions
Integrating Exchange Results
  Attachments:
    Interviewers Guidelines
    Interview Worksheet
    Interviews - SETUP SAMPLE

4.7 Tab 7 - Processes. By nature, a process often involves multiple people. Understanding the relationship between people as they work together and in the sequence of a common process, is the prelude to identifying and making improvements in the effectiveness and efficiency of the process. Facilitators are able to bring this depth of understanding to process examination. Contents of Tab 4.7 are listed below:

Purpose
Systems
Process Hierarchy
Process Elements
  Attachments:
    Systems, Cycles, and Processes

4.8 Tab 8 - Coaching. The Coaching Lab environment makes use of ***CapacityWare*™** as an electronic assistant. The facilitator helps the person (or people) being coached understand what the data means and helps develop strategies with specific actions to improve conditions by recovering lost capacity or developing new capacity for the organization. Contents of Tab 4.8 are listed below:

Overview
Roles
What to Expect
What NOT to Expect
  Attachments:
    Smart Tailoring Triage
    Group Cohesion Index
    Comprehensive Indexes
    Comprehensive Indexes Worksheet
    Trend Tower Worksheet

Bar Chart Worksheet
Extended Materials on the Web:
Coaching Lab Agenda SAMPLE
Coaching Lab Checklist
Coaching Lab Considerations
Coaching Lab Request and Follow-through Worksheet

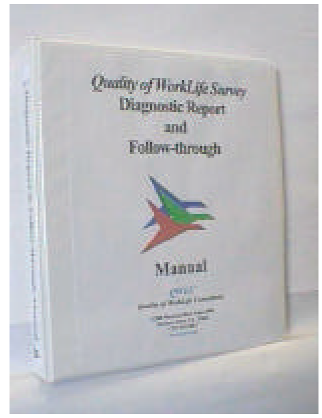
4.9 Tab 9 - Group. When most people think of "facilitation" they think of a traditional group environment. There are typically from 10 to 30 people in a session to share information, make decisions, solve a problem, or generate insight. The facilitator helps the group get to a condition that the group itself has defined. The "How to…" of group facilitation as it pertains to Change Management is described in the materials at this Tab. Contents of Tab 4.9 are listed below:

Group Facilitation Roles
Facilitation Techniques
Adversarial Conditions and Conflict
Attachments:
Team Facilitation Clinic Checklist
Video Tape Evaluations
Open Ended Questions
List of Typical Participant Characteristics

4.10 Tab 10 - Culture. Facilitating shifts in organization culture is complex. These materials provide facilitators with key leverage points to accelerate the change process and assure it is deliberate in achieving outcomes. Contents of Tab 4.10 are listed below:

Purpose
Cultural Model Components
Role of the Cultural Facilitator
Cultural Facilitation Initiatives
Attachments:
What Have We Learned About Culture
Extended Materials on the Web:
Bring the Core Realignment Workshop to Life

5.0 Diagnostics Report and Follow-through Manual. When provided with current and accurate data about the conditions of their organizations, key decision-makers are then able to take immediate and continuous actions to eliminate adverse conditions. Some corrective action may be simple while other actions may be highly complex and take extended periods of time. In organizations of any size, it is highly probably that at least three to five layers of strategy may be implemented concurrently. This manual contains operational guidance for managers and other key individuals and covers a single cycle (which may last from one to two years - in some cases longer).



5.1 Tab 1 - History and Documentation. This section contains a history of the selection and use of the Organization Change System (first iteration), a sequence of Events that have occurred up until the delivery of the data, all data collection documentation, and a diary of prevailing conditions during the data collection period that may have impacted results. Contents of Tab 5.1 are listed below:

Overview
Selection and Application of the Change Management System
Client History And Remediation Technology - C.H.A.R.T.
Events List
Data Collection Documentation
Diary of Conditions
Statement of Validity and Reliability

5.2 Tab 2 - Systemic Perspective. The first presentation of the data is made as a "systemic" graphic that depicts the correlation between survey items and generic categories (the client may tailor these category labels). The graphic is a single source for all information processed for the entire data collection cycle. Contents of Tab 5.2 are listed below:

Overview
UHS Element Summaries
The **RGB** Composite Profile
- Attachments:
  - Interpretation Guides
  - UHS Composite Profiles

5.3 Tab 3 - Trend Rankings. Up to five survey or metric item trend rankings are made with connections established between them. These displays provide a natural depiction of the most important issues the organization must deal with to recover or develop capacity from among members of the workforce. These displays are also used to establish a "cut line" below which intensive activity is likely not to occur. It is important that everyone understand that not all issues surfaced by a workforce survey, for example, can be given the attention it may deserve as judged by a small number of workers. Contents of Tab 5.3 are listed below:

- Overview
- Mean Trend Tower
- Mode Trend Tower
- Item Trend Tower
- Comment Trend Tower
- Element Trend Tower
    - Attachments:
        - Interpretation Guides
        - Trend Towers

5.4 Tab 4 - Symptomatic Item Data and Comments. In most cases, the items on a workforce survey or metric produce symptomatic results. Low scores on a particular item(s) may be due to a variety of underlying conditions that form the root of one or more problems. Interpreting symptomatic data is therefore as much artful as scientific. This section of the Manual provides all the data collected so that a thorough examination (analysis and synthesis) can be completed. Contents of Tab 5.4 are listed below:

- Overview
- Bar Charts
- Pie Charts
- In-line Comments
- End Comments
    - Attachments:
        - Interpretation Guides
        - Bar Charts or Pie Charts
        - In-line Comments
        - End Comments

5.5 Tab 5 - Coaching Lab and Planning Initiatives. About a month after initial data feedback to the organization occurs, a Coaching Lab and Planning Session will be conducted for key decision-makers and change facilitators. The results of this Lab and Planning Session will be placed behind this Tab as a record of what the organization will DO to recover or develop capacity (See also the Change Management System, Stage 6). Contents of Tab 5.5 are listed below:

Overview
Preparation for the Coaching Lab and Planning Session
Coaching Lab and Planning Session Follow-through
Attachments:
Coaching Lab Request and Follow-through Worksheet
Coaching Lab Options for Managers and Supervisors
Teams to be Chartered
Planning Priorities

5.6 Tab 6 - Strategy Development. Following the Coaching Lab and Planning Session follow-through actions will be taken by individuals with authority and by specific Teams that are Chartered to deal with well-defined issues. The Strategy Development section of this Manual provides four perspectives for strategy formulation as guidance for follow-through activity. Contents of Tab 5.6 are listed below:

General Approach Strategies
UHS Element Strategies
Item Strategies
Tailoring the Strategic Approach
Attachments:
Active Strategies

5.7 Tab 7 - Team Activity. As Teams are Chartered, they will engage in specific activities that lead to recommendations for change. Summaries of Team activities are distributed to those decision-makers that sponsor Teams and others as determined by the organization's leadership. This Tab provides a single repository for these report summaries. Contents of Tab 5.7 are listed below:

Overview
Team Challenges
Team Descriptions
Team Composition
Authority
Team Charter
Common Tasks for All Teams
Attachments:
Team Activity Reports

5.8 Tab 8 - Metric Results. As changes are made, interim measurements (often called Metrics) are taken to determine the effectiveness of those changes on capacity recovery or development. These abbreviated workforce surveys are called Metrics and are normally undertaken quarterly. Results are retained behind Tab 8 as a resource for those directly involved in the change effort. Contents of Tab 5.8 are listed below:

Overview
Metric Data Collection Options
Metric Displays
    Attachments:
        Metric Results

5.9 Tab 9 - Return-on-Investment. All organizations are concerned about the cost of recovering lost capacity. If the cost of recovery exceeds the loss, then recovery strategies may be a poor option financially. Under normal conditions, however, capacity loss is substantial and recovery costs are minimal by comparison. All ROI calculations are placed behind this Tab for reference in making critical "continue/discontinue" decisions. Contents of Tab 5.9 are listed below:

Overview
Incident Method
Systemic Method
Banding Methodology
    Attachments:
        Return-on-Investment Documentation

5.10 Tab 10 - Client History And Remediation Technology (CHART). When ***QWLC*** is used as an external resource, a special password protected web page is used to list information about the relationship and status of change initiatives. Any client member may be given the password by an internal facilitator according to internally developed guidelines. Contents of Tab 5.10 are listed below:

Overview
Scope
Roles
Remediation Technology
Diagnostic Results
Remediation Activity
    Attachments:
        Current C.H.A.R.T.

D. Internet Resources.

1. LTODI.com. This web site is the primary source for information about the non-client-specific material in the client library. ***CapacityWare*™** connects directly to this source to get needed information (See the ***CapacityWare*™** Administration Manual, Tab 1). All members of any client organization using this technology are encouraged to register for full access to all the available resources. The final cover page in each Manual (as well as this Overview and Index) in the client library contains a menu view of this Web address as an aid to assisting users in finding the information they need quickly. Links join all three sites listed here.

a. Gateway. The LTODI.com site provides an immediate gateway to reach our other two sites (described below). In addition, the Gateway provides immediate access to other frequently used areas of special interest to visitors.

b. About Leadagement Technologies, Inc. LTI develops classical organization development technology (software and literature) for practitioners to use with client organizations. Within this area are items of interest to visitors about our company, our people, our capabilities, and our clients.

c. Products and Services. We offer specific services to users that help them improve organizational performance and develop workforce capacity. These services are described and illustrated in this area.

d. *CapacityWare*™ Software. One of the core elements of the ***CapacityWare*™** system is the application software that helps diagnose, and track remediation efforts to a successful conclusion. This area provides software users with guidance on "how to" use the system effectively.

e. *CapacityWare*™ Literature. The Organization Change System is a new and compelling approach to recovering and developing workforce capacity in all organizations - especially large complex organizations. It is impossible to accomplish effectively systemic goals without extensive supporting literature. This system is supported by a substantial and growing library of literature for the full range of interests across the implementation spectrum.

2. QWLCI.com. As a consulting firm, ***Quality of WorkLife Consultants*** has additional information pertaining to specific client involvement and consulting service options. Key links are also available to the other two sites.

a. About *QWLC*. As a separately organized company, ***QWLC*** provides direct client services. This area tells the company story and introduces visitors to the primary staff.

b. Events. ***QWLC*** produces "open" Events throughout the year as a public service, and as a "no fee" client service. Events include training, certification, Quarterly Facilitator Exchanges, and monthly "open to the public" Forums.

c. Clients. This area includes a straightforward list of clients we serve as well as comments and links to testimonial videos. Visitors can get a feel for who we serve and how they feel about the quality of service they have received.

d. Feedback. We are always looking for feedback that lets us know whether we are "on track" with customer satisfaction. We know that without customer feedback we run the risk of being unresponsive to the needs of those we serve.

e. Best Practice Contest. Based on client submissions, we recognize and reward client initiatives that are consistent with our Organization Change System approach. If a client is using our system (or any part of it), and submits acceptable documentation as evidence to that fact, we'll decide what course of action we can take to reinforce their efforts in a positive way.

3. QualityofWorkLife.com. The third site is used for direct access to standard instrumentation. Results are sent directly to ***QWLC*** for processing or may be channeled to a client user if prior arrangements are made in advance.

a. Site Links. This sites links directly to the others listed above. We believe these three sites are the minimum "network" needed for the most effective service possible.

b. Quality of WorkLife Surveys. There may be a variety of surveys that can be accessed and completed online. Some are "open" to anyone who would like to respond others are there for a specific purpose and are password protected (with the password provided to only those who are expected to respond).

c. RGB Inventories. There are several categories of **RGB** Inventories that "type" work style preferences for clients and family members. All are available online to provide maximum options for clients to respond.

Comprehensive Client Library Index

This Index references the entire Client Technology Library.

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