

Displaying Results

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A. Overview. *CapacityWare*TM primarily displays graphic results on-screen in a variety of configurations. Whatever can be displayed on screen can be printed by using the File pull down menu bar. One of the most advantageous features of *CapacityWare*TM is its ability to "drill" into the data and provide the user with precisely the information needed to make high quality decisions. Figures 1 through 6 are basic templates that are used throughout the system to display data graphically. Figures 7 through 10 are the screens that define options the system will use to return to the user the appropriate display. Figure 11 helps the user improve the labeling options for demographics. Figures 12 through 15 include Event Evaluations and Leadership, Management, and Supervisory (LMS) Feedback advanced options not previously available.

B. Display Template Options. Figures 1 and 2 are the basic templates for displaying RGB results - work style preference indicators. Figures 3 through 7 display survey results. Each display is designed to give the user insight into conditions that impact organization capacity in some way, thereby helping the user design and implement strategies and actions to increase effectiveness. Most displays are linked to Best Practices that assist designers by providing sound suggestions that will result in improved capacity. Printed templates include marginal text that clarifies the graphic.

1. Individual and Composite RGB Graphic Profile (Figure 1). The Individual and Composite Graphic Profile appear identical except for Text (not shown) that would either identify the individual or identify the group for which the composite has been created. When printed, a "printed date" is also shown along with the date the instrument was taken (for the individual). The dominant color is always displayed at the right side of the circle, with the next dominant to the

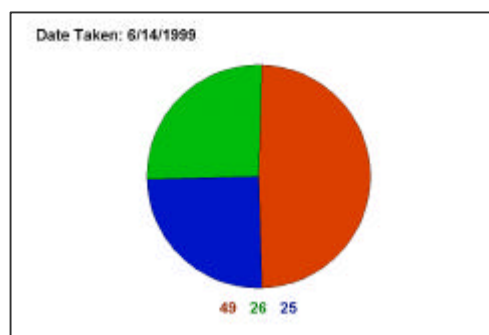


Figure 1.

upper left, and the least dominant to the lower left. The numeric scores for each color are listed below the graphic.

2. Comparison RGB Graphic Profile (Figure 2). One individual can be compared to another individual, a group composite, or to the Task Analysis if Matching Task and Talent (MTT) Technology has been used. The illustration below shows two individual people compared to each other.

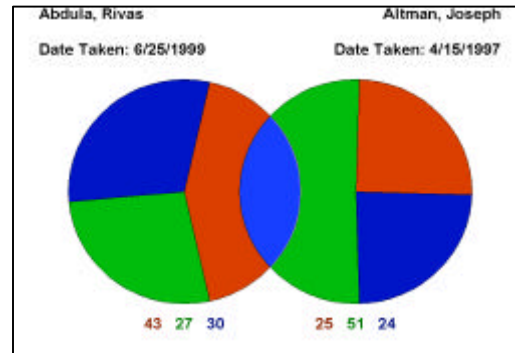


Figure 2.

3. Unifying Human Systems Radial Graphic (Figure 3). The UHS graphic profile provides a unique systemic view of the organization capacity. Up 100 survey items are summarized within each of the ten radials in this graphic. The "rings" represent the zero-to-nine scale on the survey. Out is good, in is not so good. The subtle color difference in the rings indicates a shift in ring-groups on the modified Likert scale. When displaying data, numerous colors and numbers that paint an accurate picture of the organization as a human system augment this template.



Figure 3.

A major problem in many organizations is the lack of systemic thinking - making a connection between elements so that any change to one element can readily be seen for the potential influence it will have on the rest of the system. Often, people resist learning how to read the UHS graphic because it is reportedly confusing. Taking the time to learn how to read and interpret this graphic provides valuable insight into understanding current conditions and how best to make needed changes.

The ten default elements depicted in the graphic can be changed by users to reflect the language used by the client organization, but we recommend caution against not depicting the major elements of a human system.

4. Trend Tower (Figure 4). The Trend Tower is the second unique *CapacityWare*TM graphic display. The Tower automatically "surfaces" issues that need attention by placing the "low scoring" items at the top of the chart. The zero-to-nine scale (plus the "N" for No Response) is displayed across the top, while the survey item numbers are reordered from low to high along the left edge. The illustration is a sort by item mean (average). The chart can be ordered by several sort options to provide the user with the information needed to take fast correction action.

This same graphic can be used to show the sorted arrangement items in order of:

- a. Items,
- b. Adjusted Mean,
- c. True Mean,
- d. UHS Category,
- e. Comments,
- f. Median, and
- g. Mode.

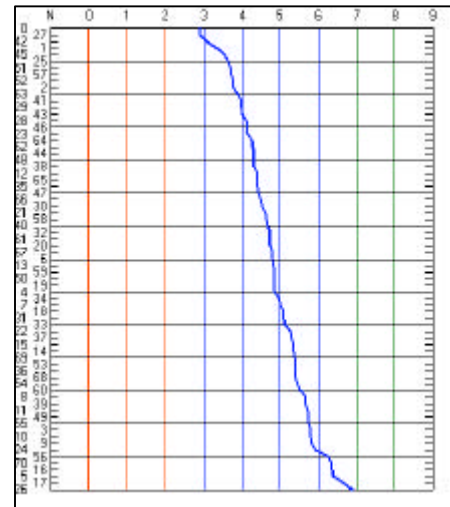


Figure 4.

5. Bar Chart. The Bar Chart provides the user with a different (but more traditional) display.

This time the zero-to-nine scale (plus the "N" for No Response) is displayed across the bottom of the chart in the same groupings as the modified Likert scale. The hash-mark design serves to show the distinction between scale groupings. Below each scale grouping are the raw numbers and percentages of respondents in each scale grouping. The Mean line is displayed vertically to depict the item average. Along the left and right margin are the quantities of respondents. The bars attest to the number of respondents that circled the specific scale numbers on their survey. The heading contains the wording of the item and pertinent information about the item.

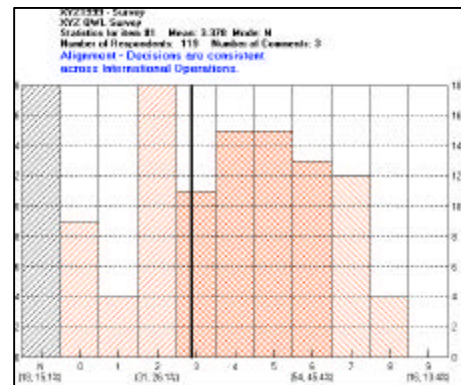


Figure 5.

6. Pie Chart. The Pie Chart displays the same information as the Bar Chart and is provided as a preference alternative only. Instead of the distinctive 11 bars on the Bar Chart, the Pie Chart displays only the Non-response, and the three major divisions. The 0-2 slice and the 7-9 slice contain three bars, while the 3-6 slice contain four bars. From this standpoint, the graphic depiction is somewhat distorted.

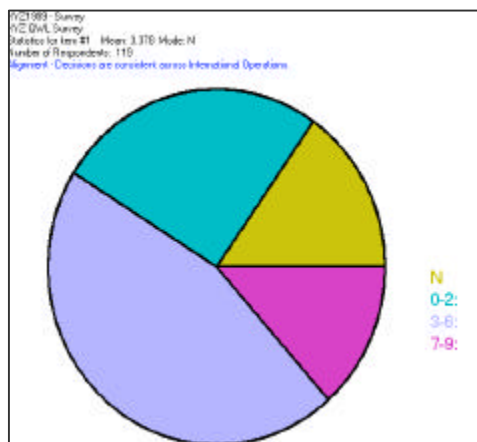


Figure 6.

C. Graphic Display Template Overview. Currently there are six graphic display templates that carry the full weight to presenting data to users. These graphic displays are augmented by narrative and numerical tables that provide information in a different (non-graphic) way for users who prefer those options. The graphics are used to:

- 1. Show Relationships Quickly and Dramatically.** The colors used with the RGB clearly illustrate both a style preference and a holistic picture simultaneously.
- 2. Show Detailed Systemic Data Through Powerful Summary.** The overlaying graphics of the UHS depict all the details rolled into a single snapshot of organizational capacity.
- 3. Show Priorities That Demand "Top Layer" Attention.** Of the hundreds of potential actions that could be taken, the Trend Towers hone down that number to a critical few that need attention.
- 4. Show Item-by-Item Details with Descriptive Narrative.** The Bar Charts show all the details for each item yet allow access to the respondent narrative that brings the numbers to life.

D. Selection Criteria and Display of Individual Results. When displaying data for one individual the selection is made on the screen illustrated below.

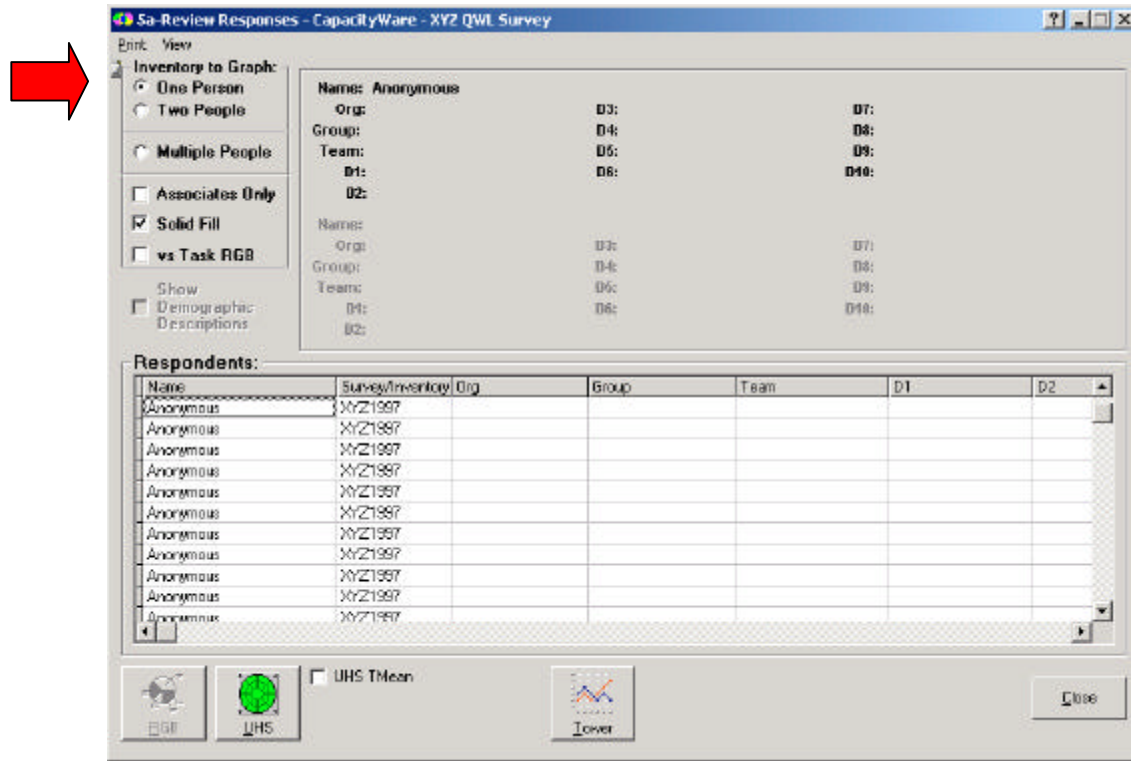


Figure 7.

1. **One Person.** "Click" on the individual.
2. **Versus Task RGB.** When using MTT-RGB Technology, "click" a check mark into the vs Task RGB field to display compatibility.
3. **Multiple People.** To make composites and comparisons select Multiple People.
4. **Show Demographic Descriptions.** "Checking" this box translates all demographic codes to full text translations for ease of Respondent selection - and it slows down processing.
5. **Icons.** *CapacityWare*TM will only display the Icons that are appropriate for the Instrument Selection. It will not allow a "click" on the RGB, for example, when only a survey is being processed.
6. **Close.** This Action Button closes this screen option.

E. Selection Criteria and Display of Comparisons. Select Two People, "click the two respondents into the Selection windows, then "click" the Icon Action Button on the lower screen to display the data on the appropriate graphic. All other options are explained immediately above.

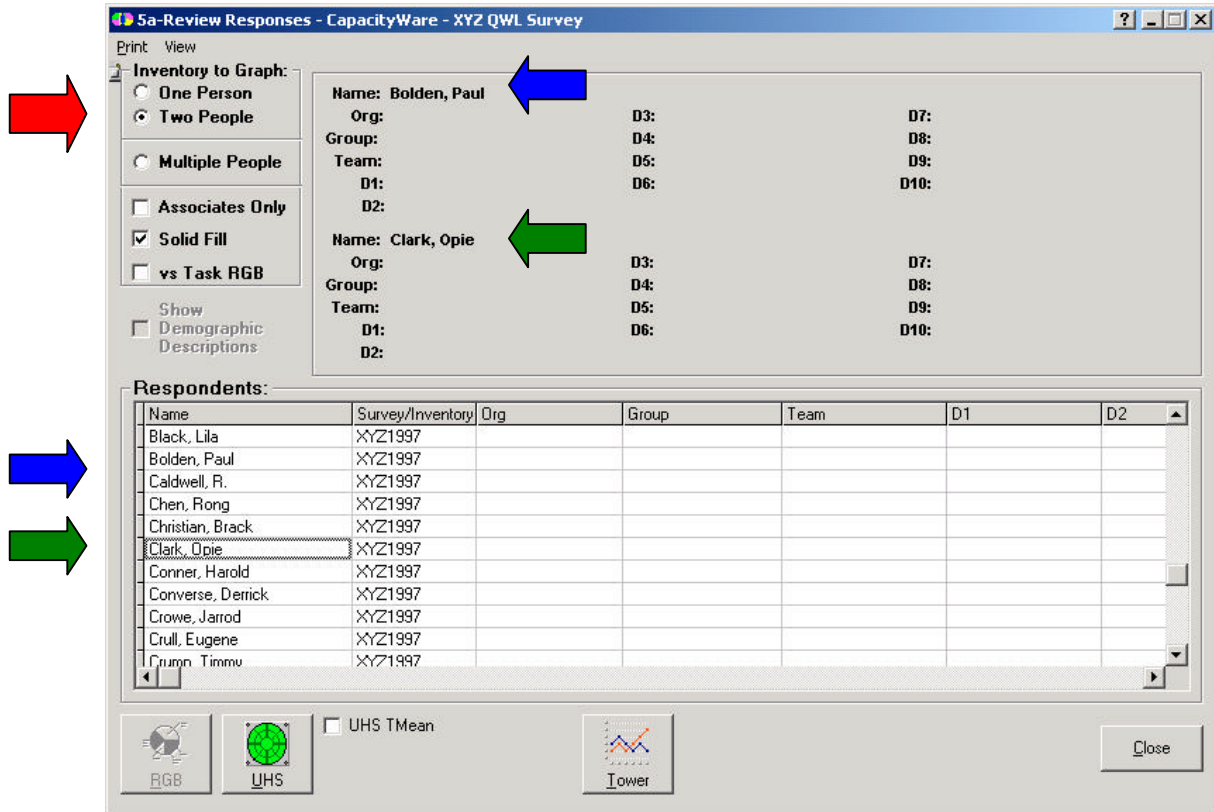


Figure 8.

Note that the first selection from among the Two People option is made while the One Person option is selected. Once the first person has been selected (Blue Arrows), the Two People option is selected and the second person to be compared is clicked (Green Arrows). Comparisons can only be made with RGB and UHS data.

F. Selection Criteria and Display of Composites. A composite creates a single display from the data of everyone who has responded (or who has been selected) to the specific Instrument. In addition to composites, this screen illustrates the ways that comparisons of an individual can be made to the composite (for example, Individual to whole organization). Such composite-comparisons are useful in coaching situations where the user desires to show graphically the difference between the individual capacity and that of the whole organization, and the implications of those differences.

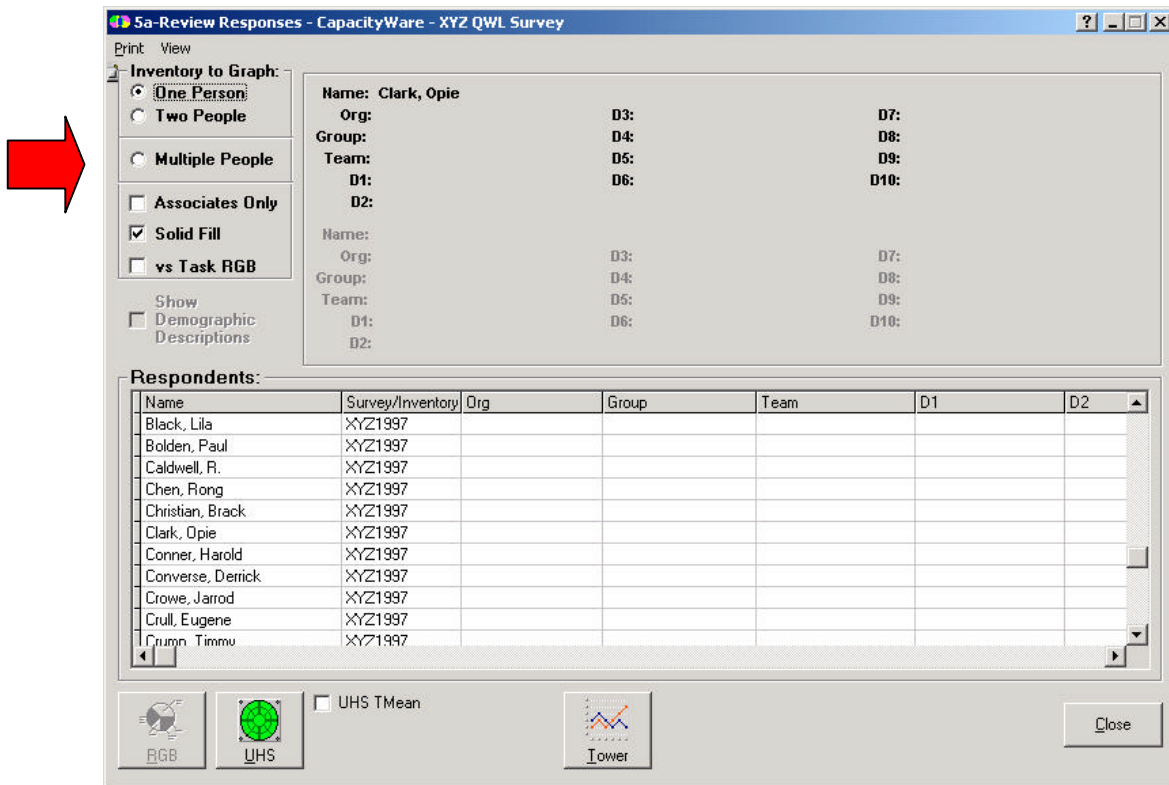


Figure 9.

Note that the first individual to be selected for comparisons is accomplished when the default selection of "One Person" is made.

Selection of the second person may be accomplished when the "Two People" selection is made by clicking on the second persons name in the Respondents window.

When "Multiple People" is selected, the screen immediately shifts to the window illustrated in Figure 10. Note that the respondent identified as "One Person" will remain in the Respondent window (See illustration in Figure 10 - Altman, Joseph). This will permit a comparison to be made PROVIDED; the user also selects the "Show Single User" box (See the Red Arrow in Figure 10). When any RGB Inventory is the instrument selected (See Paragraph 2, below) the comparison will be two overlapping RGB Graphic Profile pie charts. When any Survey is the

instrument selected the result will be a Red Line for the individual overlaying a UHS Composite Graphic for the organization identified by the Demographics selected.

See
Paragraph
7,
Figure 11

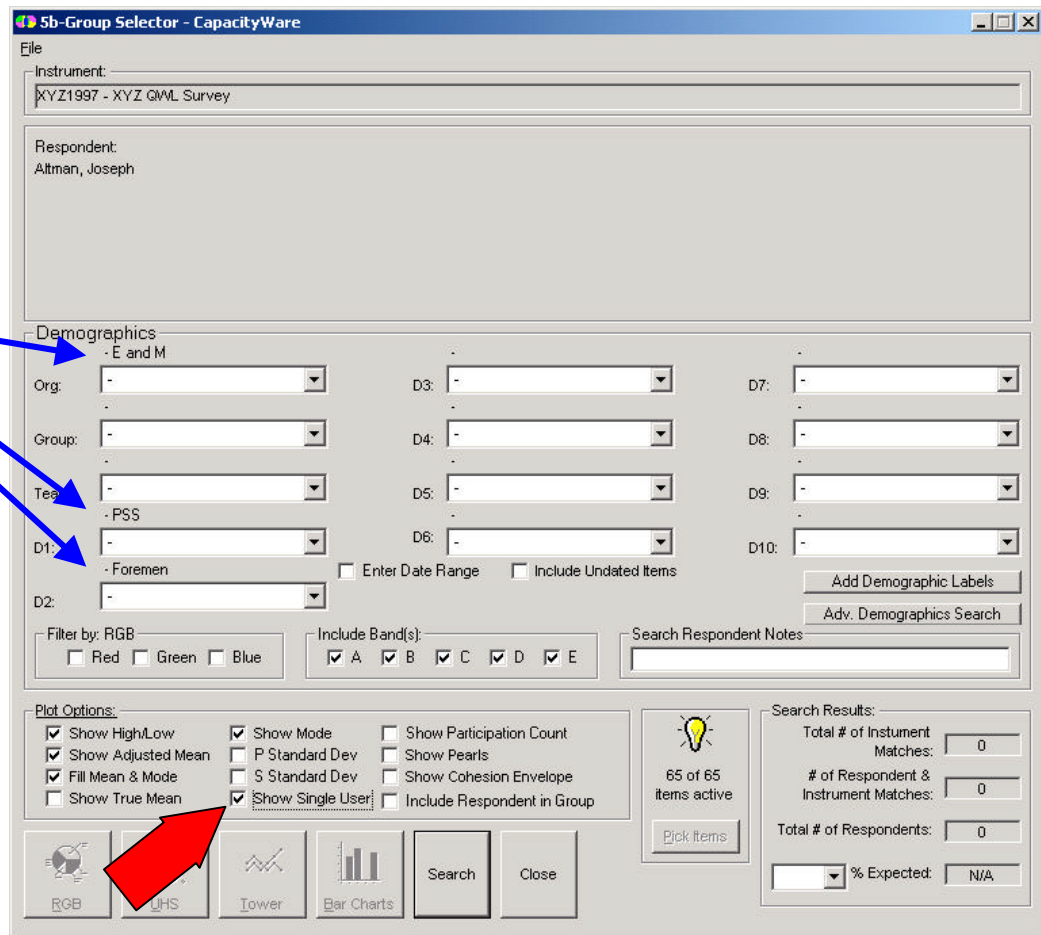


Figure 10.

1. File. Two options present themselves when File is "clicked." It allows the user to select a different survey, and it allows the user to save the display to a specific Coaching Lab screen. Coaching Lab screens are only functional when the system is installed as part of an organization's Decision Support Center.

2. Instrument. The Instrument being used by the software is displayed in this field.

3. Associates Only. The system may allow users to compare their own results with the composite results of a group defined by the user. When this is permitted, Attachment 2.6.1, Associate List, is used to identify the group. At least three individuals are required.

4. Respondent. If a Respondent has been selected from the previous menu, that name will be displayed in this field. The default respondent is always the first one listed.

5. Search Criteria. Any combination of search criteria can be selected to be included in the search criteria. Only by using the features of the Advanced Demographic Search can multiple items be selected from the same demographic pull down AND simultaneously have other demographics intentionally omitted from the search.

6. Enter Date Range. Only Instrument responses within the date range will be included if this option is activated.

7. Add Demographic Labels. The speed with which users can quickly identify which of the demographics are described behind the Org, Group, Team, and D1 through D10 is aided by the addition of a label to the Demographics selection panel. The Add Demographic Labels window illustrated below will permit a general description to be made on the panel as an aid. See Figure 10, for an illustration (in blue).

| Demographic | Label |
|-------------|-----------|
| Org: | - E and M |
| Group: | - |
| Team: | - |
| D1: | - P S S |
| D2: | - Foremen |
| D3: | - |
| D4: | - |
| D5: | - |
| D6: | - |
| D7: | - |
| D8: | - |
| D9: | - |
| D10: | - |

Figure 11.

8. Advanced Demographic Search. This feature allows advanced users to select and deselect a complete range of available demographic items.

This search option permits the selection and deselection of items within a single demographic group.

This option permits the selection and deselection of items within multiple demographic groups.

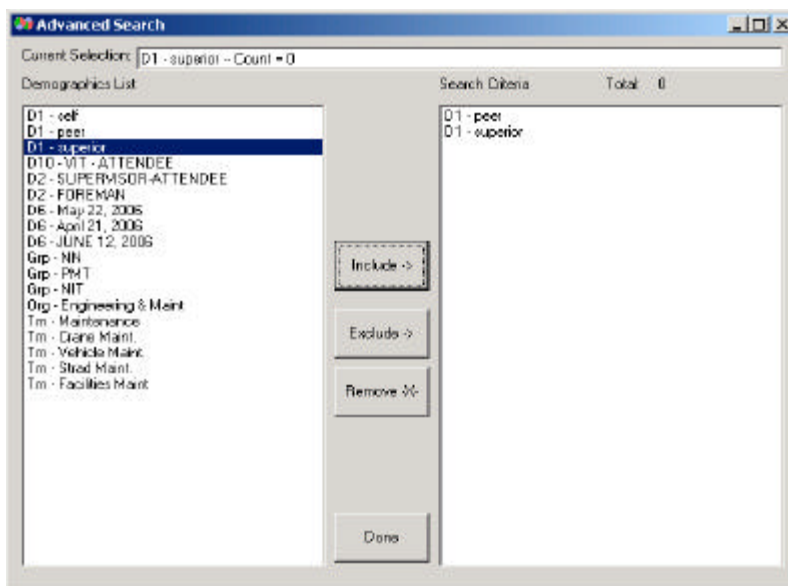


Figure 12.

9. Include Respondent in Group. This feature automatically includes the selected respondent in the composite. When this feature is "checked" off, the selected respondent is NOT included in the composite.

10. Include Undated Items. This feature is for advanced users who import data from other compatible systems.

11. Filter by RGB. When indexed (real name) users have completed both RGB and survey results, the survey results can be filtered through the RGB to determine cultural implications. This is an advanced user feature.

12. Include Bands. This selection (all on is the default) return survey results through the filter of Band distribution. This is an advanced feature.

13. Search Respondent Notes. Some selections may be made, not by a traditional demographic, but rather by an identifiable word or phrase that isolates those in a respondent pool. Those who have completed a specific course of instruction can illustrate an example. As long as all who have completed a course have the words "Completed ADC Advanced Course" in their Notes section, for example, a search can be made that only includes graduates in the returned respondent records.

14. Plot [UHS Template Overlay Only] Options. There are nine overlay features that can all be used simultaneously when required. A comparison between the composite and an individual is made possible by selecting the "Show Single User" feature. By selecting Show True Mean, the No Response Survey items are discounted in the display. When the Show Cohesion Envelope is selected, the user can coach leadership groups to improve consistency of decision-making - a critical element that reduces or eliminates workforce capacity loss due to confusion, natural activity acceleration, or chaotic activity. When "Show Pearls" is selected, the

user can verify the distribution of responses even across the systemic UHS overlay. By selecting “Show Participation Count”, the user can determine the potential effectiveness of Event participation in lost capacity recovery.

15. Pick Items. This Action Button allows access to screens that enable the user to turn survey items on and off at will as a way of testing capacity development hypotheses.

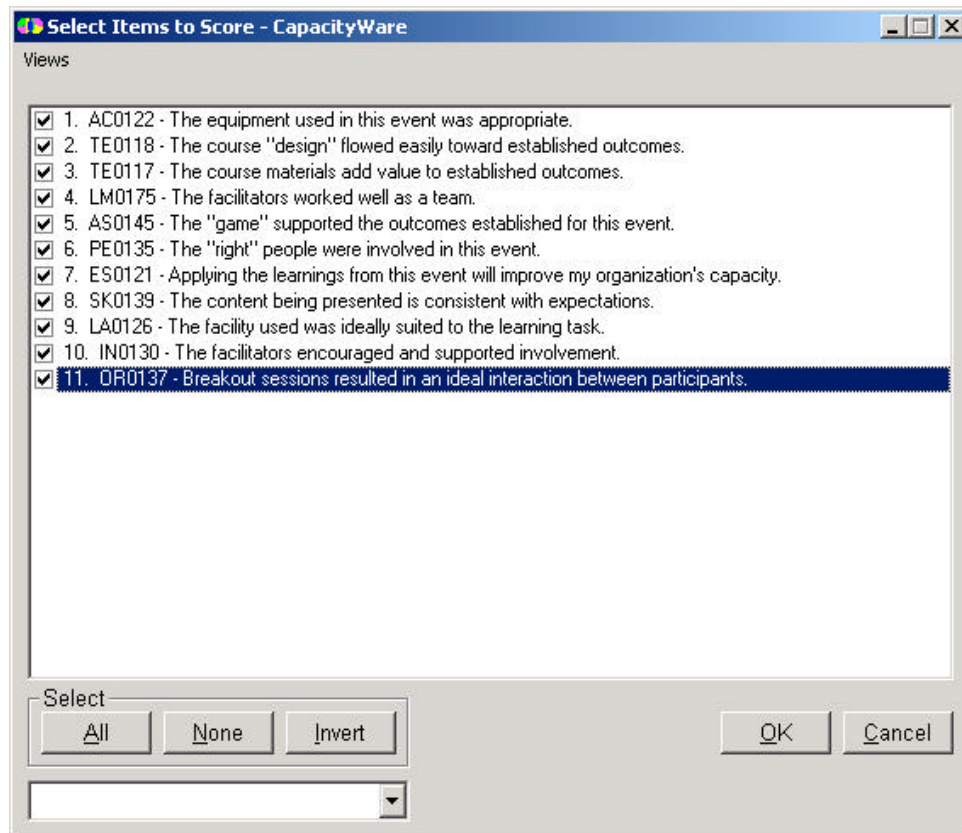


Figure 13.

a. Views. If alternative configurations for the data (different items selected on/off) that the standard ALL ON view, and the alternative view is likely to be used repeatedly, the user may define the alternative view with this option. An example might be "Best in all UHS Elements" - only the top-scoring item in each category would be turned on.

b. Check Selected or Unselected. Each item on the survey has a selection box that can be either "checked" or "unchecked." These selection options turn the item on (checked) or off (unchecked) when results are computed. Note that the PICK ITEMS box light bulb will be turned off for all but the standard ALL ON view as a reminder to users.

c. Select - All, None, or Invert. As an aid to users, selections can be accelerated by the use of Select ALL, NONE, or INVERT options. When alternative views have been established, the pull-down menu permits the selection of the appropriate alternative view.

16. Search Action Button. The Search Action Button MUST ALWAYS be "clicked" before any display will be generated.

17. Search Results. When all calculations have been made, the software will return an array of Search Results that define the parameters of the display.

18. Action Buttons Display Icons. When the software is "ready", the appropriate Icons will show ACTIVE. When active any one of them can be "clicked" to display results. When the user returns to this screen, new options can be selected and the Search Action Button MUST be "clicked" again.

G. Linking the Group Selector Screen to Event Evaluations. The Event Evaluation option enables participant-respondents to complete survey evaluations that can then be attributed to a specific event, multiple events, or all events. A combination of these options (Respondent and Event) also enable the user to identify and display a "scoring pattern" for each respondent (as long as the respondent is identifiable by name or code) for any combination of events. All other demographic options remain available as described earlier.

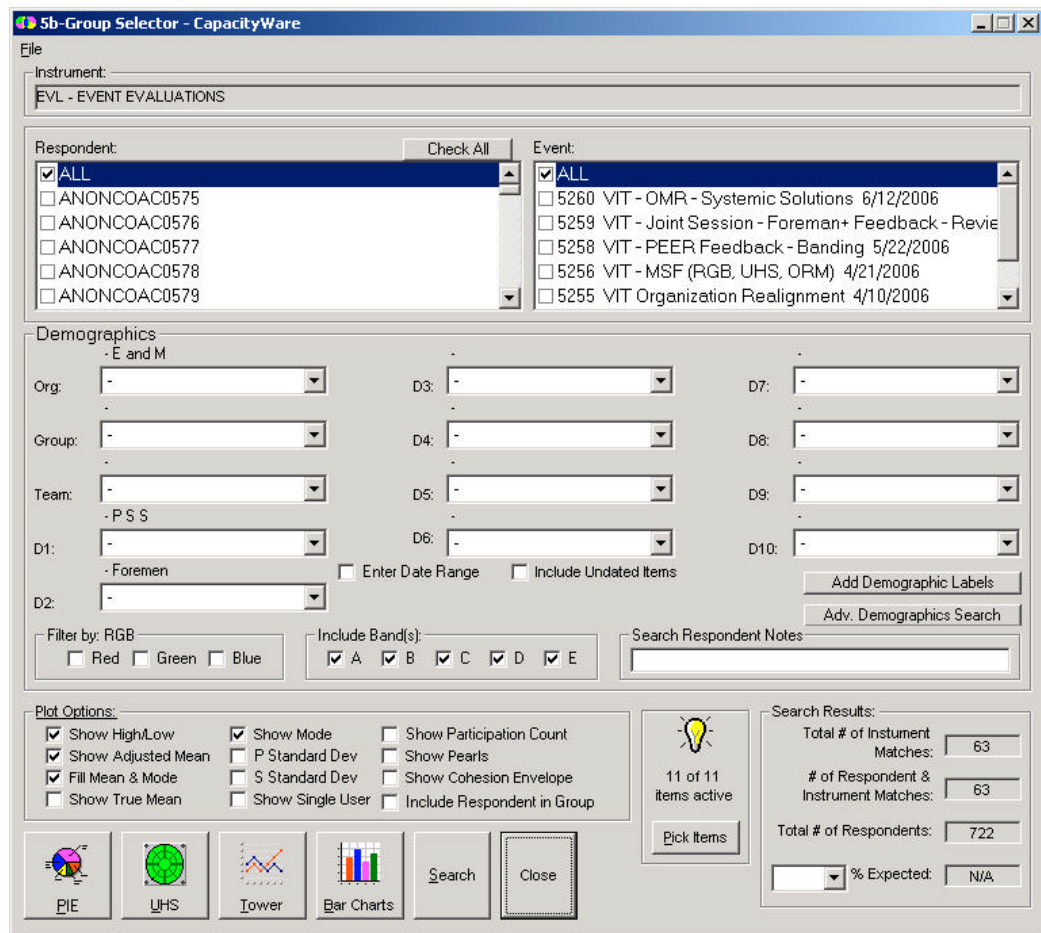


Figure 14.

H. Linking the Group Selector Screen to Leadership, Management and Supervisory (LMS) Feedback. LMS Feedback is conceptually the same as Multi-Source Feedback (MSF) and 360o Feedback. It is markedly different than the results of an employee opinion survey based on the perspective of the whole organization as opposed to the perspective of the performance of the single leader, manager, or supervisor. There is no limitation that this option can only be used for those in one of these three generalized positions. All other demographic options remain available as described earlier.

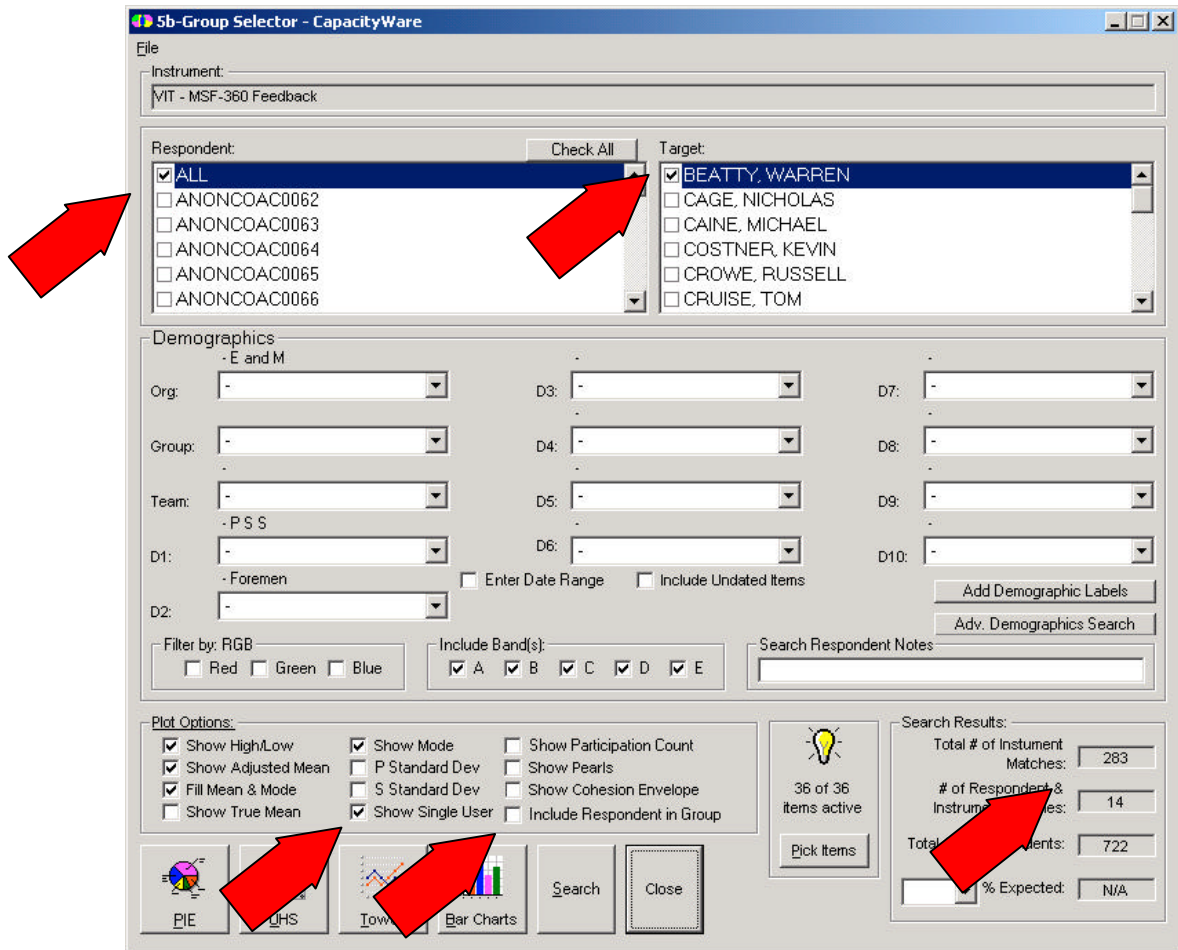


Figure 15.

It is important to recognize that the respondent may also be the "target" or subject being evaluated. It is often valuable to suggest that the "target" complete the evaluation based on how they would rate themselves. The perspective must be clarified in this case. Is it an evaluation of the individual by the individual, or is it an evaluation of the individual from the perspective of those others who will be responding.

Typically, fictitious names are assigned to "targets" to protect anonymity, as can be seen in Figure 15. This is especially true if results are delivered to the individual using installed *CapacityWare*™.

1. All Respondents. If "ALL" Respondents is selected, only those respondents among all who completed the feedback for on a particular "target" will be used to process results for that specific "target."

2. Target. The "target" is the individual subject of the evaluation. When providing relative scores among members of a target group, all "targets" may be selected to provide the average scores for the entire group. In this way, "targets" can determine if they are ranking above, or below the average of their peers.

3. Show single user. When "One Person" has been selected (See Figure 7, page 4), a Red Line will be graphed to depict that single user. This is ideally used, for example, when an individual completes the Feedback for on his or her self. The results will compare the "target's" perception to other respondents.

4. Include Respondent in Group. The users can exclude one respondent from the group of respondents to determine if this will significantly alter the Composite Profile.

5. # Of Respondent & Instrument Matches. The quantity of matches that appears in the window will be equal to the number of available feedback forms processed for the selection options made.

I. Summary. By showing Instrument results, primarily in graphic form, the user is able to come to a faster understanding with greater utility than in any other way. *CapacityWare*TM is unique in its ability to display complex data and make it easily understood. The six basic templates provide the user with an understanding of "how" they will be presented with data. The two major configuration screens provide the user with an ultimate way of "drilling" into the data in a way that effectively translates the meaning intended by those who complete the data collection instruments from a distance. When displaying results, keep the following in mind:

1. Show Attributable Individual Data Only with Permission. One of the greatest fears among many survey respondents is that their results will be shown to or viewed by the wrong person and it will crush their career. Protect individual data and prevent it from falling into the wrong hands. A full Service version of *CapacityWare*TM has features not present in a Reader version. Distribution of available data across an organization can accelerate capacity improvement, or it can undermine progress if the data is not used in confidence. By the same token, seek permission to use data when it will serve an organization's purpose - primarily from those in leadership positions.

2. Develop Dialog that will bring the Numbers to Life. *CapacityWare*TM is people-driven, not data driven. Great care is taken to make sure that narrative is available to add meaning to the otherwise dry numbers. Ask people what the graphics and numbers "mean" to them as a way to enhance dialog, a strategy that will develop or restore capacity.

3. Let the Data Be the Guide Needed to Create Priorities. When the data is solid and supported by stories from those who know its meaning, priorities emerge naturally. Don't let

intuition confuse clear priorities that emerge from data collection efforts - especially when the intuition comes from those distant from the front line.

4. Present Data in Human Systems Terms. Everything is influenced by everything else in a human system. By the time data is collected, the system has changed a bit. Solving one problem will create another. The work of developing and recovering capacity is never done. Organize teams with workers close to the front line, some whom may be cynical, to unravel issues and propose improvements. The investment is well worth the effort. Arm these teams with sound meaningful data - hopefully that they have had a hand in collecting.

5. Post and Distribute Relevant Results Frequently. Everyone seeks a yardstick by which they can measure their own performance. The yardstick must be meaningful and timely. Survey results filtered by management and stagnant from lack of feedback, becomes highly suspicious. Collect frequently through tailored surveys, and feed results back quickly. Link results to activities; link activities to results. Capacity development is cyclical.

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www.LTODI.com - December 2006 - (757) 591-0807 - "throughout" - 15-88-3504 - *CapacityWare*™ Administration Manual, Tab 6