

Cross Case Study

2013a



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Leadership Coaching and Organizational Optimization

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All photographs in this case study courtesy of Timber Homes LLC, Onion River Exchange and Davis Studios.

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Summary

This cross case study report summarizes the findings from three organizational implementations conducted over the course of 2012 and early 2013.

“Working with Round Sky solutions helped us tackle challenges in our business that we had been struggling with for quite some time. We saw immediate benefit from the systems we learned and we expect to continue to benefit for months and years to come. Each person on our administrative team gained clarity and we now have a process in place to support greatly improved communication and enhanced problem solving skills.”

Teresa Davis



Introduction

In this cross case study we feature three different organizations, Timber Homes, Davis Studio, for profit entities, and the Onion River Exchange, a not for profit. The organizations ranged in size from micro to small with operating budgets of under half a million. All three are mission driven operations with a range of missions serving social needs, artistic endeavors and the environment. Please reference the individual case studies listed in the References section for further details.

Presenting challenges across the three organizations ranged from pressure to transition leadership functions to the need to make effective strategic decisions on behalf of the growth of the organization. One common theme across all three organizations that surfaced in the surveys was the high cost to the organization of lack of visibility and agility with who was accountable for what, which generated anxiety, inefficiency, and frustration. In addition, all expressed a desire for an increase in effectiveness and efficiency.

All three organizations contracted with Round Sky Solutions for training in our collaborative management system, though two of the organizations selected the intensive training model and one chose our longer training option. Each organization learned the basics of collaborative meeting and decision-making, a transparent accountability method, and launched minimally sufficient tracking systems for key outputs of their communication. In addition, Timber Homes and Onion River Exchange learned a process for evolving short-range priorities collaboratively and Timber Homes began the business model evolution process. As a result, by the end of the engagement with Round Sky, all three organizations experienced significant leaps in productivity, interpersonal, systems, and management.

Methods

Assessment surveys were administered to all members of each of the organizations before and right after the conclusion of their work with Round Sky Solutions which ranged



from 8 to 18 weeks, and one organization participated in a follow up survey at 25 weeks of practice. Individuals completed an online form, which used both positive and negative measures and asked respondents to answer using a 5-point agree/ disagree scale, where 1=strongly disagree and 5=strongly agree. By this system, higher scores (indicating stronger agreement) are desirable for positive statements and undesirable for negative statements. For example:

*I love my job and find it fulfilling.
I am frequently frustrated and unhappy with my job.*

The 72 statements in the survey (see Appendix A for details) were composed by the author informed by the methodology of Metrics at Work (Yardley & Noka, 2009) and McKinsey Solutions Organizational Health Index (n.d). These statements were further reduced by research expert Jessica Broome, into 10 categories which covered both the organizational and individual levels: Overall Job, Whole Organization, Management, Compensation, Physical, Workload Capacity, Recognition, Interpersonal, Systems, and Performance. Scores were analyzed to assess change in the organization as a result of Round Sky Solutions' work.

"Cecile came to us at a time of absolute chaos. She leaves us with the ability to better see the full scale of work that has been done, needs to be done, and how to do that in a way that includes all staff members in the decision making process for everything relating to our scope. The equality in this process is truly wonderful."

Chloe Budnick

Response rates across all three organizations from both intake and exit assessments averaged 82%. From Timber Homes, all four partners responded at intake and three for the exit, with the exit snapshot taken at 9 weeks of practice. In Davis Studios case, two out of the three staff provided answers on the intake and all three responded for the exit taken at 8 weeks of practice and the survey taken at 25 weeks of practice. For Onion River Exchange four staff took part in the ongoing training, three responded to the intake and likewise three for the exit survey which was at 18 weeks of practice.

Intake Snapshot

From the assessment essay questions and various intake conversations, all three organizations demonstrated these core challenges to varying degrees:

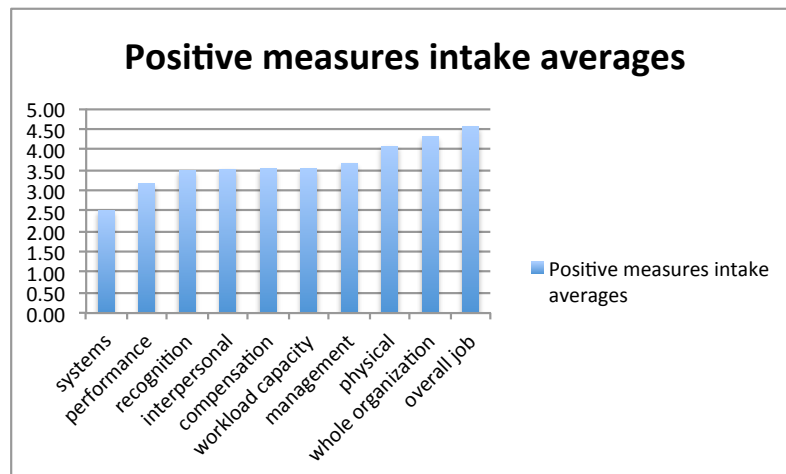
- inefficient and irregular meetings
- lack of clarity around who handles what issues
- frustration with irresolvable issues
- inefficient processes and procedures

“Working with Cecile has helped our growing business amalgamate our differing opinions and visions of the future. Thanks to her, we now have the tools to hold fair and effective meetings which will help us process the issues ahead.”

Timo Bradley

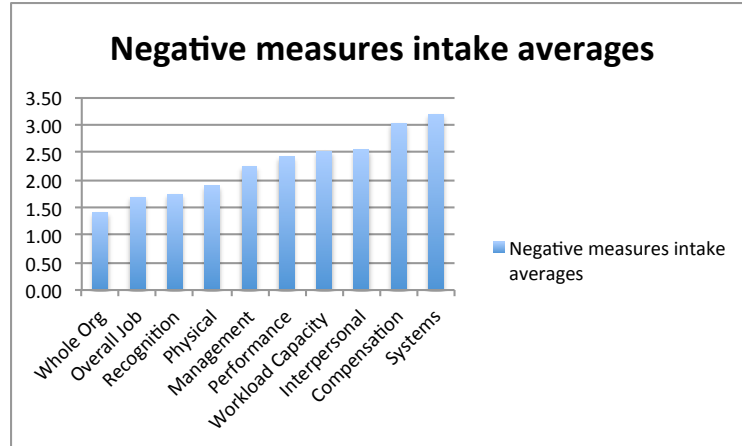
- unclear and inefficient decision making
- communication snafus
- staff overwhelmed by workloads
- pressure to strategically increase revenue
- significant leadership role shifts
- individuals needing to grow quickly in capacity
- rapidly changing operating landscape

In addition, each organization rated highly initially for enthusiastic, engaged, and dedicated staff with a generally high regard for their organizations. In the positive measures, areas that particularly showed room for improvement across all three organizations were Systems (2.5), Performance (3.2) and Recognition (3.5) while the highest positive measures landed in Overall Job (4.6), Whole Organization (4.3), and Physical (4.1).



On the negative measures (with high numbers indicating higher pain points) the categories that showed the most room for improvement on average across the three organizations were Systems (3.2), Compensation (3.0), and Interpersonal (2.5) with Whole Organization (1.4), Overall Job (1.7) and Recognition (1.7) needing the least improvement.

Comparing positive and negative measures, Systems rated as the category needing the most help while Whole Organization and Overall Job both came in as categories needing the least improvement.



“Discovering a new framework for problem solving that showed potential for effectiveness and efficiency was pretty exciting.”

Nancy Scheemaker

Solutions Implemented

All three implementations included a training process using current business issues in which the teams learned how to conduct meetings based on surfacing business issues, or tensions, identifying which kind of tension they were dealing with, and processing them using the appropriate tools. In addition, they launched individual task tracking systems and learned how to use tracking systems for information that came out of their meetings. They also completed a process of generating and explicitly clarifying all the roles and accountabilities they currently had functioning. And each implementation included instruction in facilitation so the organizations could continue to use the structured meeting processes and tracking systems after concluding their work with Round Sky. Some notable differences between the implementations include the capital investment challenges Timber Homes faced and the funding cliff the Onion River Exchange needed to tackle.

In order to address their particular challenges, Timber Homes and Onion River Exchange learned the short-range Strategy meeting process which teaches a process for collaboratively surfacing a strategic theme and key initiatives for the next several months to create an aligned set of short-range goals for an organization. Due to their need to make long-range strategic decisions involving significant investments, Timber Homes elected to also include a training on their Business Model and its evolution, which facilitated their decision making process around their infrastructure investments.

All three of the organizations learned the basic processes for

"Working with Round Sky Solutions was a pleasure. Integrating these principles and practices has been both engaging and informative and I have noticed a marked improvement in how we operate as a company in a short period of time."

Sean Dalton



Governance, Operations, Interpersonal and Individual. Timber Homes and Onion River Exchange learned the Short Range Strategy Meeting Processes. None of the organizations learned the Purpose or Advanced Interpersonal and Individual Practices, and only Timber Homes began the Business Model and long range Strategy processes. Further improvements in each of the categories could be predicted from the integration of all of the seven processes: Purpose, Business Model, Strategy, Governance, Operations, Interpersonal and Individual.

Implementation Challenges

The single biggest common challenge with the implementation reported in the surveys was the temporary cognitive stretch of learning and immediately applying a new framework for understanding and processing work related tensions. Despite the discomfort of the first few sessions, every team reported relief after each meeting at just how much ground they were covering and how much more effective and productive they felt.

Some differences across organizations include differentials in the tracking systems integration: two out of the three organizations successfully integrated the tracking systems. Instructors hypothesize that differences in development and personality contribute to such variations. Additional coaching support can be offered in such situations.

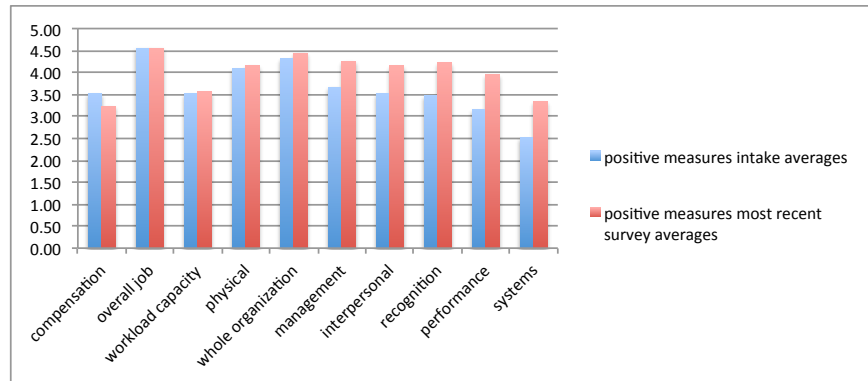
In addition, financial constraints which limited tracking or facilitation training to the bare minimum placed additional demands on staff to learn quickly and independently. A more relaxed training schedule would allow for a more gracious learning curve.

A further implementation challenge lay with the spread of the tools beyond the initially trained teams. In particular, the Onion River Exchange had initiated its training at the staff level intending to spread to the Board, and found the tepid uptake of the tools at the Board level frustrating and undermining of the efficiency gains they had made.

Results

From the positive measures in the surveys, increases in scores were seen across all of the categories with the only area which experienced a noteworthy decrease was Com-

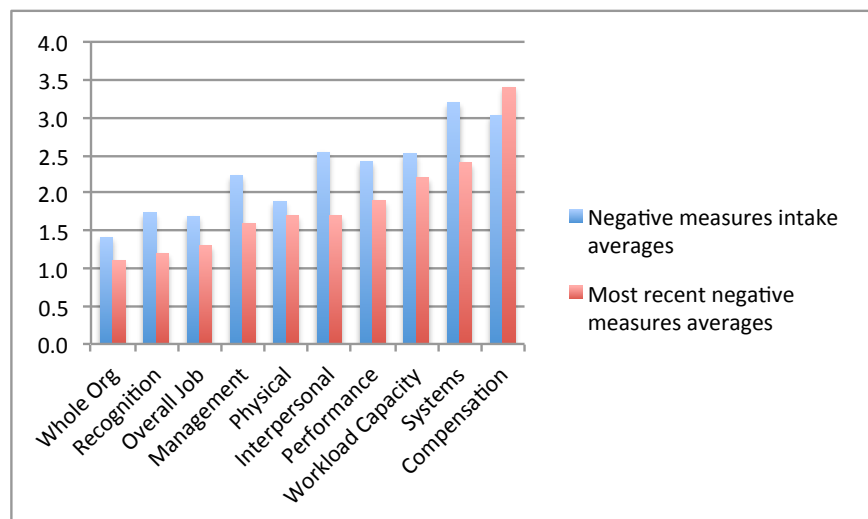
pensation. This appear linked to the greater visibility into their organizations that the trainees experienced through engaging in the practices. This visibility motivated further Business Model evolutions which could support increased compensation.



The negative measures showed strong gains with improvements across the board, except for Compensation (-12%), for reasons described above, with the highest gains in Interpersonal (33%) and Recognition (31%) followed closely by a 28% improvement in Management and a 25% jump in Systems. Overall Job showed a growth of 23% and Whole Org bumped up by 22%.

"There was always movement towards a solution. All meetings were immensely productive."

Heather Kralik



When averaging the percent change in each of these ten categories across the positive measures these same patterns appeared with a 32% improvement each in Systems and Performance, followed by a 24% improvement in Recognition. Improvements in Management grew by 22% and

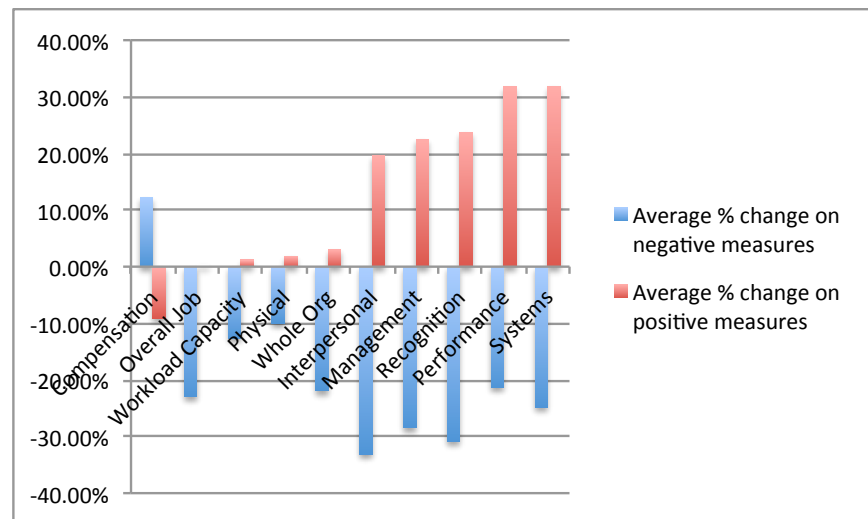
Interpersonal by 20%. Small gains were seen in Workload Capacity (1%), Physical (2%) and Whole Organization (3%).

The improvements demonstrated by the negative measures percent change were slightly different with the Interpersonal (33%) showing the biggest gains, followed by Recognition (31%), Management (28%), and Systems (25%).

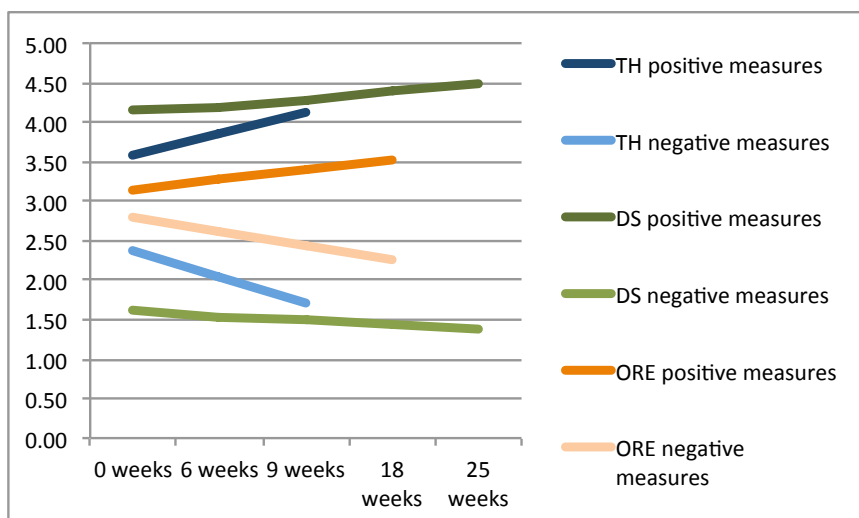
Comparing average percent changes in both positive and negative measures, the data reveals that Systems, Performance, Recognition, Management and Interpersonal sustained significant improvements, while Whole Org, Physical, Overall Job and Workload Capacity showed marked decreases in negative measures and minor positive increases. Compensation was the only category to show the reverse, demonstrating the challenge that became more visible for organizations around the sustainability of their Business Models, an awareness which prompted active Business Model evolution to create the long term changes which are necessary to improve compensation.

“The most useful part of the Discovery Day was learning a technique that was rooted in our very real business issues. As soon as the team saw that their time would be focused on learning better meeting management while also solving real issues, there was high engagement.”

Chris Morrow



When creating a single data point summary for all positive and negative scores by organization over time, the trends are clear, with positive scores increasing and negative scores decreasing:



In addition, total beneficial change, the sum of both the positive and negative percent change demonstrates the combined benefits the organizations experienced:

- 57 % total beneficial change in Systems
- 55 % total beneficial change in Recognition
- 53 % total beneficial change in Performance
- 53 % total beneficial change in Interpersonal
- 51 % total beneficial change in Management
- 25 % total beneficial change in Whole Organization
- 23 % total beneficial change in Overall Job
- 14 % total beneficial change in Workload Capacity
- 12 % total beneficial change in Physical
- -21 % total beneficial change in Compensation

Furthermore, percent change over time across the organizations averaged 1% increase in positive scores per week and 2% decrease per week in negative scores, demonstrating an overall 3% overall improvement per week in healthier and more productive organizations. This confirms the results from open ended survey questions and closing conversations where participants reported the conversion of major blockages into constructive solutions for the organization as the result of using the tools and practices.

One of the biggest reliefs mentioned was the improvement in communication skills which enabled a team to identify and resolve issues going forward, including being collaboratively clear about who is responsible for which type of tasks. All three organizations also reported being significantly more

"Round Sky has an innovative and refreshing approach to organization accountability and efficiency that empowers all members at all levels of to contribute to the organization and take ownership of their jobs." Irvin Eisenberg

efficient and effective in their meetings. With further training in the remaining seven processes, organizations could expect to see additional increases in benefits. From the essay questions, these are the combined themes that emerged in the open ended responses:



Conclusion

In conclusion, each of the three organizations completed a training period which enabled them to integrate a more productive communication operating system which they continued to use to produce ongoing improvements in key organizational health categories. In addition, the organization that faced strategic infrastructure investment decisions obtained the support and clarity to make those choices and expand at a healthy pace. The organization that needed to coalesce and energize its Board succeeded in doing so in a remarkably short period of time. With ongoing practice over months and years, these organizations stand to see significant returns on their investment into learning this new collaborative operating system.



"Working with Round Sky helped our small company be more effective than it ever has been. Our individual roles are clear to ourselves and to each other and our communication succinct. I don't doubt that the effects of this training will be long-lasting." Lydia Littwin



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Appendix A: Survey Questions

OVERALL JOB

1. I love my job and find it fulfilling
2. I'm frequently frustrated and unhappy with my job
3. I know this is a dead end job
4. I'm frequently bored and disinterested with my job
5. I can't wait to find another job
6. I find my job really interesting and engaging

MANAGEMENT

1. My direct supervisor is doing a fabulous job
2. I like the owners/managers of this organization we get along well
3. I think my supervisor should be replaced tomorrow
4. The leadership in the organization knows how to think ahead
5. Seems like every day there's some new challenge coming up between me and the organization

COMPENSATION

1. I'm happy with my pay
2. I wish my organization had decent benefits
3. I'm underpaid for what I do
4. I feel that my job benefits are adequate

PHYSICAL

1. I really don't like the physical work environment
2. I enjoy the physical work environment
3. I'm frequently frustrated by the quality of the tools or supplies I have to use in the course of a day
4. I have all the supplies and tools I need to get my job done efficiently and safely

OVERALL ORG

1. I think the organization I work for is awesome
2. I think the organization I work for is terrible
3. I feel quite detached from this organization
4. I really want this organization to succeed
5. I'll stay working here as long as I possibly can
6. Most workers/employees are really invested in this organization
7. Most folks who work here don't really care what happens in the organization
8. It's of no consequence to me whether or not this organization does well
9. I am deeply involved with this organization

10. I have all the opportunities to develop myself I could hope for working here

WORKLOAD CAPACITY

1. I have a lot of control over how I get my work done
2. The details of how I work are often out of my control or determined by other people
3. My work rarely intrudes on my personal time
4. No matter what I do, I would never be able to get all the work for my job done
5. I'm frequently able to get to everything on my work plate
6. I find I often have to sacrifice my personal life to meet the needs of my work

RECOGNITION

1. Teams that work hard here get recognized and rewarded
2. Any hard working individual in this organization will get recognized and rewarded
3. It wouldn't matter how hard a team worked here, no one else would ever notice
4. I'll never be recognized for the hard work I do

INTERPERSONAL

1. The organization's communication systems are a mess
2. The organization's communication systems are in order
3. I know exactly what I'm responsible for in my job
4. There's a lot of communication and work flow between teams here
5. It's not that clear to me what I'm supposed to be doing in the organization
6. Everyone here seems to get along
7. I know exactly where to take an idea for improvement and know that I'll be listened to
8. There are frequent disputes between workers that are not effectively resolved
9. There are a number of teams that really stick to themselves
10. I know exactly who is responsible for what in the organization
11. I am frequently confused about who does what in the organization
12. People working here know me and care about me
13. I don't think anyone here really knows or cares about me
14. I've already tried many times to bring an important idea for improvement forward and gotten nowhere
15. No one has a clear idea of what the current priorities are for the organization

16. My on-boarding process was smooth and complete; when it was over I knew exactly what I had to do
17. I was thrown into the water when I arrived and told to swim
18. The organization does a great job of connecting to the community
19. As a organization in our community, we're kind of isolated

SYSTEMS

1. Our organization is pretty efficient; I'd be hard pressed to find a system we could improve
2. We are in need of some key tech systems to make this place run well
3. Our legal structure is in need of repair
4. The organization's legal systems are in order
5. We have all the necessary technological systems in place

OUTPUTS/ PERFORMANCE

1. The quality of our products or services makes me cringe
2. Our customers/clients are highly satisfied
3. Our organization does its work very well; I'm proud to be working here
4. We get many customers/clients complaining about our products or services
5. We waste so much time and money it sometimes makes me want to cry
6. The organization is struggling financially
7. We don't really have a handle on our marketing
8. Our marketing is clear and compelling and is hitting the right markets
9. The organization is doing well financially