

Culture / Flexible Work

Full Assessment

Overview



PONTEFRACT
GROUP

General Overview – Full Assessment

The Pontefract Group (TPG) provides consultative guidance through a Full Assessment of an organization's current culture and processes to help clients shift to a new operating model, including the possibility of shifting to a remote working model full-time.

The Full Assessment focuses on the following:

- **Leadership Practices:** analysis of current leadership behaviours across the organization;
- **Learning & HR Practices:** a review of learning systems as well as certain people and culture (HR) practices and methods (e.g. recognition, performance, etc.);
- **Collaboration and Technology Practices:** an investigation into your organization's existing collaboration techniques and behaviours including the use of digital technologies;
- **Office Work Practices:** review of present policies, procedures, norms and operating practices as it relates to how work is conducted in the office;
- **Mobile Work Practices:** review of existing policies, procedures, norms and operating practices with respect to how work may be being conducted in a mobile or "work from home" model.

What is the Full Assessment?

- **Kick-off Meeting** (2 hours) with various stakeholders invited by the client to outline the purpose of the Assessment, conducted over Zoom or the client's technology of choice.
- **Individual 1-1 interviews and small focus groups** with key stakeholders to assess current practices and desired future state, to determine the best strategy and prioritization for any working model / flexible work change.
 - TPG recommends a cross-section of employees and leaders to be formally interviewed.
 - The total number of sessions dedicated to interviewing (whether 1-1 interviews or focus groups) does not exceed twenty-five (25).
 - Each session lasts no longer than 60 minutes. Focus groups limited to 12 people.
 - The client is responsible for working with TPG on the master schedule & bookings.
 - All sessions will be conducted using the phone, Zoom or the client's technology of choice.
 - It is advantageous for the client to submit employee engagement data and results, in addition to any other qualitative or quantitative data that can help prior to these sessions.
- **Surveying** of a significant subset of the organization's employee population using an online survey tool to assess broader employee sentiment, and other aspects of flexible work.
 - **NOTE:** Before administering the survey, TPG will work with the client to define the scope and sample size of the target audience.
 - The final target audience should represent an accurate cross-section of the organization including employee roles and tenure.
 - The survey will take no longer than 20 minutes to complete.
 - A bank of questions will be submitted to the client for approval.

What are the Outcomes and Deliverables?

- **Report:** TPG will produce a report titled “Assessment Results” that contains the following:
 - Current State Analysis – a detailed breakdown of the organization’s current state;
 - Potential Future State Recommendation - foundational requirements and recommendations for the organization to make changes in its various practices;
 - Transition Plan - key recommended and prioritized actions to help the organization shift from the current state to future state. It includes short-term wins and long-term initiatives.
- **Strategy Presentation:** 90-minute presentation of all findings and recommendations.
- **Next Steps Workshop:** 90-minute facilitated discussion on the next steps the organization ought to take to achieve a flexible work model.
- **Overall:** TPG will use the extensive data mined from the interviews, focus groups and surveys (plus the additional data provided by the client) to help it define, plan for and then transition to a fully functioning flexible work operating model.

What is the scope of the engagement?

- Dependent on the number of interviews and focus groups as well as the complexity of the organization, the full assessment engagement can range between 200 and 250 hours of work.

How much does it cost? How long?

- One-time fee of \$75,000 + GST. All work is conducted remotely. 3-4 months to complete.

Who is the Pontefract Group?

Dan Pontefract is the founder and CEO of the Pontefract Group, a firm that improves the state of leadership and organizational culture. The group comprises of senior organizational design professionals who have worked in a multitude of sectors assisting people with their specific needs.

After twenty-five years in senior leadership roles across organizations such as TELUS, SAP and BCIT, Dan launched the Pontefract Group to help leaders and organizations improve levels of engagement, productivity, culture and processes. The Pontefract Group conducts organization-wide assessments, organizational redesign, consulting & flexible work change management as well as keynote speaking.

Dan is the best-selling author of three books: *OPEN TO THINK, THE PURPOSE EFFECT* and *FLAT ARMY*. His next book, *LEAD. CARE. WIN. How to Become a Leader Who Matters* will publish on September 29. Dan is also an adjunct professor at the University of Victoria.

Previously over a ten-year period as Chief Envisioner and Chief Learning Officer at TELUS—a Canadian telecommunications company with revenues of \$14 billion and 50,000 global employees—Dan launched the Transformation Office, the TELUS MBA, and the TELUS Leadership Philosophy, all award-winning initiatives that dramatically helped to increase the company’s employee engagement to record levels of nearly 90%.