






Interpretation of Results

GRAPHS

The two graphs that follow summarize the results of an Organization Survey against the backdrop of three categories, Needs improvement Meets expectation, and Exceeds Expectation. Each category, its value range and color code are given to the right.

Color Code	Definition	Score Range
	Needs Improvement	≥ 0 and < 2.5
	Meets Expectation	≥ 2.5 and < 4
	Exceeds Expectation	≥ 4 and ≤ 5

Ranking Table

The Ranking Table is used to assist in identifying areas requiring the greatest attention. The rank value also can be interpreted as the priority of a factor in terms of attention required. Ranked factors (or Factors requiring the highest level of attention) #1, #2 and #3 are indicated by a "<" label to the right of the rank value. A rank order value displayed in red indicates that participants of this survey have scored this factor with a below average score.

Definition of the Survey 12 Factors

1. TEAM DEVELOPMENT

Based upon your direct experience, how effectively does the organization identify and develop advanced financial and economic skills among employees so that work teams can meet client needs for high-level financial services?

2. ENVIRONMENT

Based upon your direct experience, how effectively does the organization create a climate of trust and confidentiality for handling confidential sensitive financial information that instills client trust in the organization?

3. COMMUNICATIONS

Based upon your direct experience, how effectively does the organization create a climate of direct, open, honest feedback and communication of information with clients across all levels of the organization?

4. CONFLICT RESOLUTION

Based upon your direct experience, how effectively does the company manage organizational, political, functional and individual conflicts to meet the needs of clients without compromising company values when they arise?

5. DECISION MAKING

Based upon your direct experience, when decisions are being made to solve client problems, how effectively are client and team members involved in synthesizing and analyzing the data in reaching a decision?

6. TEAM GOALS

Based upon your direct experience, how effectively are the financial goals of the organization, team and client set and respected in day operations?

7. WORK PERFORMANCE

Based upon your direct experience, how effectively do managers and team leaders hold people accountable for achieving quality results for the client on time within financial goals and constraints?

8. FEEDBACK

Based upon your direct experience, how openly and timely is feedback to the client provided as a daily means of achieving clearly stated performance expectations agreed to between the client and the organization?

9. LEVEL OF RESPONSIBILITY

Based on your direct experience, how seriously do individuals and team members accept accountability for their own actions and productivity in achieving client results on time within budget?

10. TEAM LEADERSHIP

Based on your direct experience, how effectively do team leaders and managers interact with clients in a manner that insures confidence in the organization's financial and economic advice in setting fiscal direction and policy?

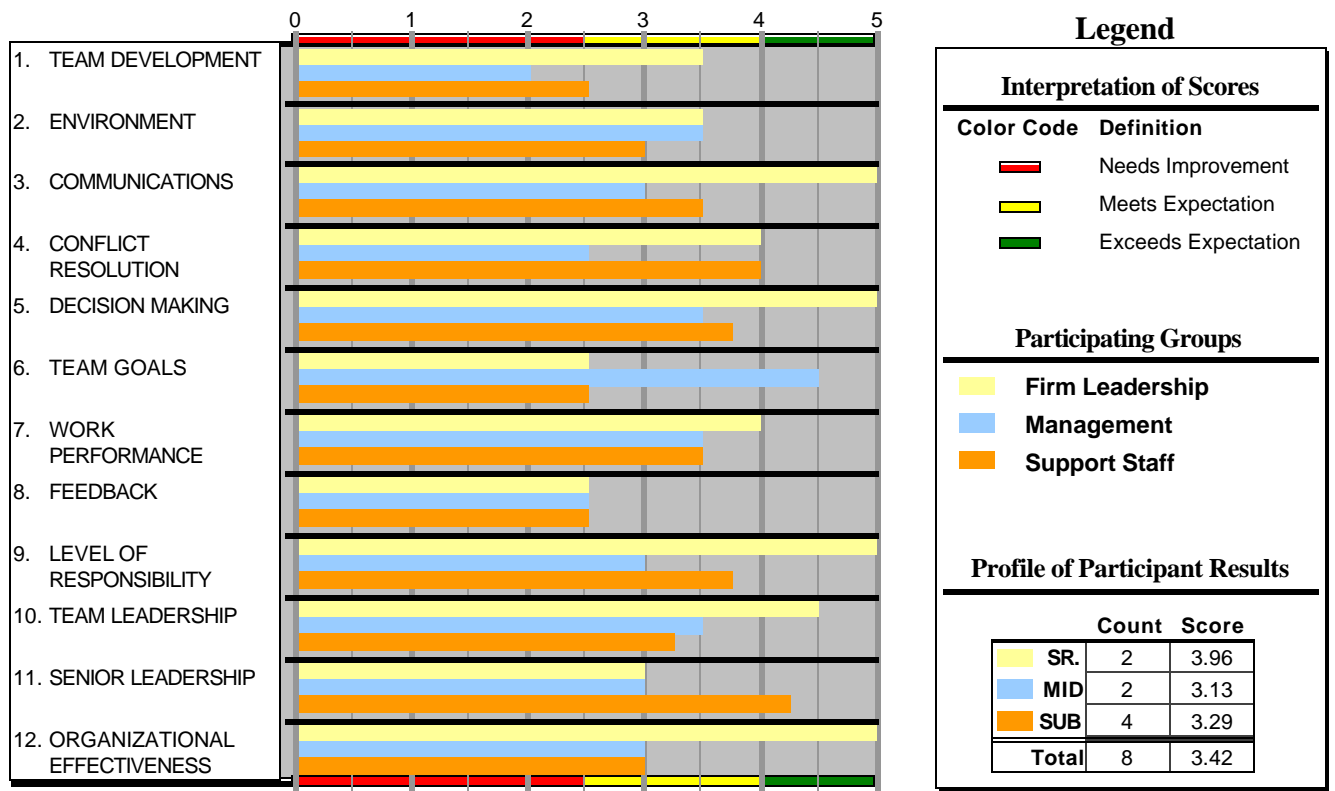
11. SENIOR LEADERSHIP

Based on your direct experience, how strong are the credentials of your organization's principals, top managers and team leaders in establishing a competitive edge in the financial services industry?

12. ORGANIZATIONAL EFFECTIVENESS

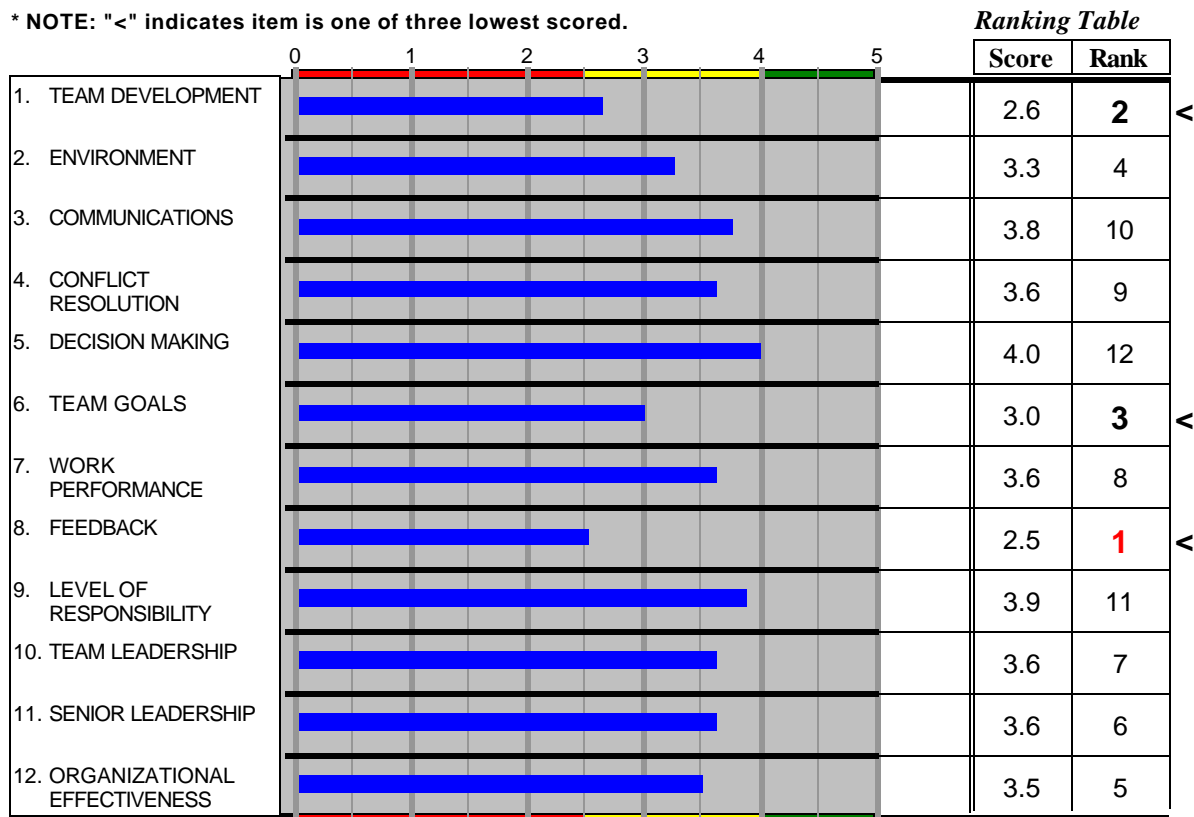
Based on your direct experience, how frequently do delivered services and results lead to healthy profits and follow-on contracts with clients?

- Comparison Chart of Respondent Groups -



- Summary of Survey Data Ranked in ORDER OF IMPORTANCE -

* NOTE: "<" indicates item is one of three lowest scored.



Developmental Strategies

The data from the twelve survey questions from all survey responses have been processed. The survey questions receiving the three lowest scores have been determined and listed below. This list represents the operational areas of your organization indicating the greatest need for attention. The text below presents each of the lowest three factors (in ascending order), their respective scores, their default (provided by this software) and the strategies entered by the Human Resource department of this organization.

FEEDBACK Score = **2.5**

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TEAM DEVELOPMENT Score = **2.63**

TEAM GOALS Score = **3**

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