



Human Potential Assessment of

[Insert name of Organization]

Date:

[Insert date of report]



Assessment conducted by [BEING at Full Potential](#)



# TABLE OF CONTENT

1. BACKGROUND OF CLIENT .....	03
2. INTRODUCTION TO THE HUMAN POTENTIAL REPORT .....	04
2.1. Objective of report .....	04
2.2. How to interpret the report .....	04
2.3. How to interpret the color codes .....	04
2.4. Structure of the report .....	05
2.5. What comes after this assessment .....	06
3. EXECUTIVE SUMMARY .....	07
3.1. Peak Experience leads to Peak Performance .....	07
3.2. Organizational Maturity Index .....	08
3.3. Talent Development Strategy Framework .....	09
4. ORGANIZATIONAL PERFORMANCE .....	10
4.1. Detailed findings 1: Organizational Performance Metrics .....	11
4.2. Detailed findings 2: Organizational Performance Matrices .....	12
5. ORGANIZATIONAL EXPERIENCE .....	17
5.1. Detailed findings 1: Human Potential Realization .....	17
5.2. Detailed findings 2: Opportunity areas .....	19
6. MINDSETS & ATTITUDES .....	20
7. NEXT STEPS .....	22
8. APPENDIX .....	23
8.1. Definitions; OPM's (Organizational Performance Metrics) .....	23
8.2. Definitions; BEING States & DIMENSIONS .....	24
8.3. Definitions; BEING Attitudes & Mindsets .....	25



## 1. Background of the client

1. [Insert: Key challenges facing organization]. Manual input by coach
2. [Insert: Objective of assessment]. Manual input by coach
3. [Insert: Action to be taken]. Manual input by coach

## 2. Introduction to the Organizational Assessment Report

### 1. Objective:

The purpose of this Organizational Assessment report is to shed light on the deeper drivers of organizational performance and value creation. This unique approach to assessing organizations brings the focus back to the most basic, yet most misunderstood aspect of the organization: its Human Potential. By measuring this intangible we are able to unlock breakthrough insights and open up new conversations. In the process we create the conditions for a more meaningful and fulfilling work experience, which will ultimately lead to sustainable business performance.

### 2. How to interpret the report:

This report will read quite differently than most other organizational assessments. Although we structure the data clearly and report it back in a way that is easy to understand and interpret, we deliberately refrain from offering fully articulated conclusions and recommendations. Time and again we are learning that the most profound discoveries and lasting commitments to next steps happen when the clients create their own story in the data and arrive at the conclusions that make most sense for them at a given point in time.

### 3. How to interpret the color codes:

Throughout the report we will be using four different colors (purple, green, yellow and red) to represent the scores. It is important that these codings are NOT interpreted as "good" or "bad". Instead we look at it as "EXPRESSED (green and purple)" and "UNEXPRESSED (yellow and red)". For example a yellow or red score does NOT mean the organization doesn't have the inherent ability to thrive in these areas. It simply indicates that at the current point in time it is not fully EXPRESSED. The question then becomes 'How do we access more fully the dormant potential in this area?' Similarly, a purple score doesn't mean there isn't further room to grow. It just tells us that at the current point in time, and with the current level of awareness, the organization is expressing its potential in this area. This can obviously change when the organizational awareness shifts to a higher level.

#### 4. Structure of the report:

To make it as easy as possible for the client to assimilate the findings we have structured the report according to the fundamental belief that underpins all of this work. Namely: PEAK EXPERIENCE LEADS TO PEAK PERFORMANCE. In other words, when we express our unique Human Potential (gifts, talents, aspirations) and bring our full selves to work, we are able to access greater levels of inspiration and hence deliver breakthrough results. Therefore the first part of this report focuses on the top of the iceberg (ie: PERFORMANCE of the organization) along the following key business drivers: Inventiveness, Customer Orientation, Trustworthiness, Employee Engagement, Self Leadership and Getting Things Done (top of figure 1 Iceberg Model). In section 5 of the report,, our attention shifts to measuring and analyzing the human EXPERIENCE of working within the organization (middle of figure 1: 4 BEING States). Finally, in section 6 of the report we examine how the organization is doing on the key leadership attitudes / behaviors that we need to adopt in order to further enhance the human experience of working in the organization, and as a result, create the conditions for a new wave of value creation to emerge (Bottom of figure 1: 8 BEING Attitudes).

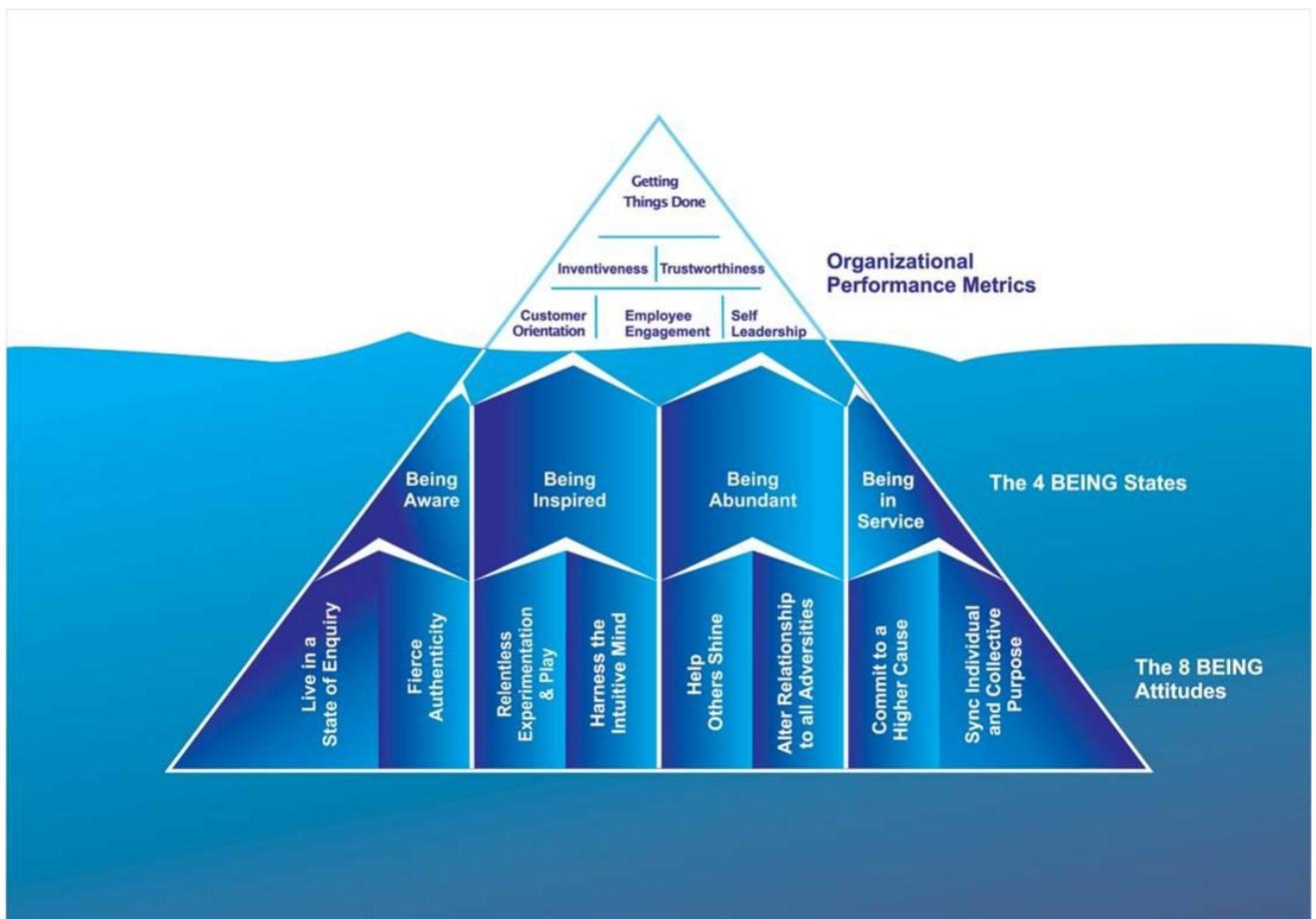


Figure 1: overview of the Performance – Experience interplay

5. What comes next:

This report is only the beginning of an organization's Human Potential journey. It simply provides the top-line findings which is bound to open up deeper questions. Depending on the needs that arise from this report, in subsequent analyses, a deeper study of different divisions or levels of the organization can be done. Breaking the data in this way will open up more insights and clarity on the next steps. Following the ENQUIRE phase (see fig. 2 below) where the data and insights are revealed we encourage the key stakeholders to spend quality time in DISCOVERY during which time the insights are fully integrated and transformed into actionable next steps, fully owned by the organization. Finally the right programs can be put in place to enable the shifts that will have the greatest impact on performance (HARNESS phase). The following diagram illustrates in more detail our unique methodology to driving change within the organizational context.

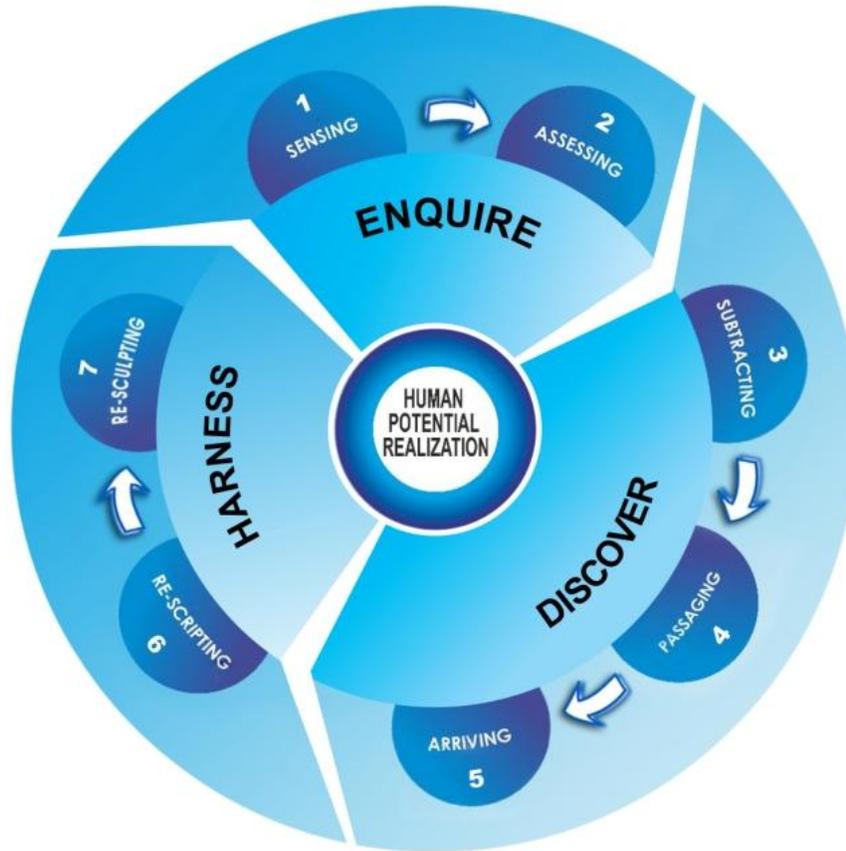


Figure 2: The HUMAN POTENTIAL Method

### 3. Executive summary

1. PEAK EXPERIENECE (INNER-STATE) LEADS TO PEAK PERFORMANCE:

The following framework considers the relationship between the EXPERIENCE of working in the organization (vertical axis) and its PERFORMANCE (horizontal axis). This high level overview highlights the strategic focus for future OD (organizational development) interventions.

COMPANY X is delivering satisfactory PERFORMANCE due to its strong CUSTOMER ORIENTATION (top score, see page 10). This approach will likely sustain the business in the short to midterm. However, in order to thrive in the long term, it will be important to bring a greater focus on INVENTIVENESS as well as a more pragmatic approach to “GETTING THINGS DONE” (bottom 2 scores, see page 12). In order to do so it needs to cultivate a working environment that encourages PLAY and EXPERIMENTATION (see page 20) as well as greater TRUST in taking action and committing to new initiatives without necessarily having full control over the outcomes.

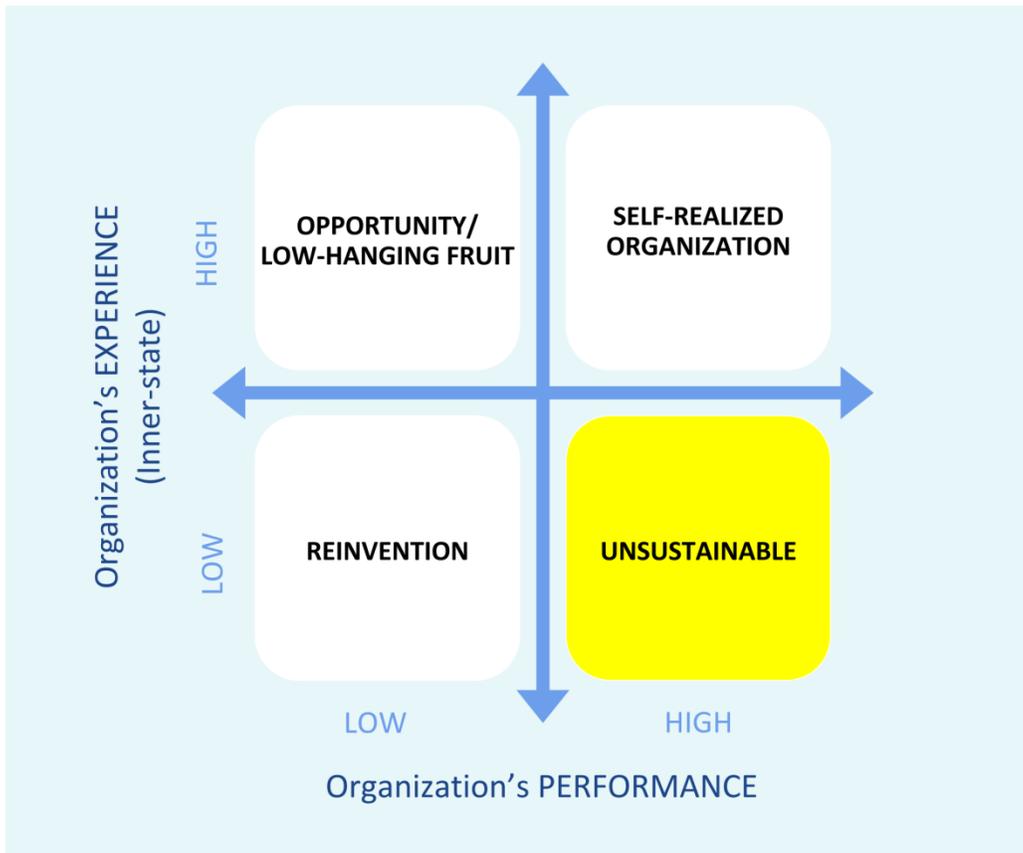


Figure 3

2. ORGANIZATIONAL MATURITY INDEX:

The Organizational Maturity Index has been adapted from the “five Koshas” which are the basis of Indian spiritual traditions. These five layers measure the level of consciousness (or maturity) of an organization at a given point in time and indicate its next stage of growth or maturity.

In this case, COMPANY X is mostly operating as a RATIONAL organization. It is very adept at problem solving and applying logic to understand the root causes and underlying motives. Decisions are typically made with a lot of forethought and plenty of supporting data. The organization tends to play it safe in order to avoid making “mistakes”. However, in doing so, it also forgoes the opportunity for passion, creativity and breakthroughs to emerge. Growing to the next level of organizational maturity (PURPOSE) will require more compassionate and visionary leadership that is committed to realizing the full potential of their people. The organization will learn to access and rely more on its intuition (in addition to the rational processes) in order to make informed decisions about the “emerging future” vs the best practices of today.

## Organizational Maturity Index

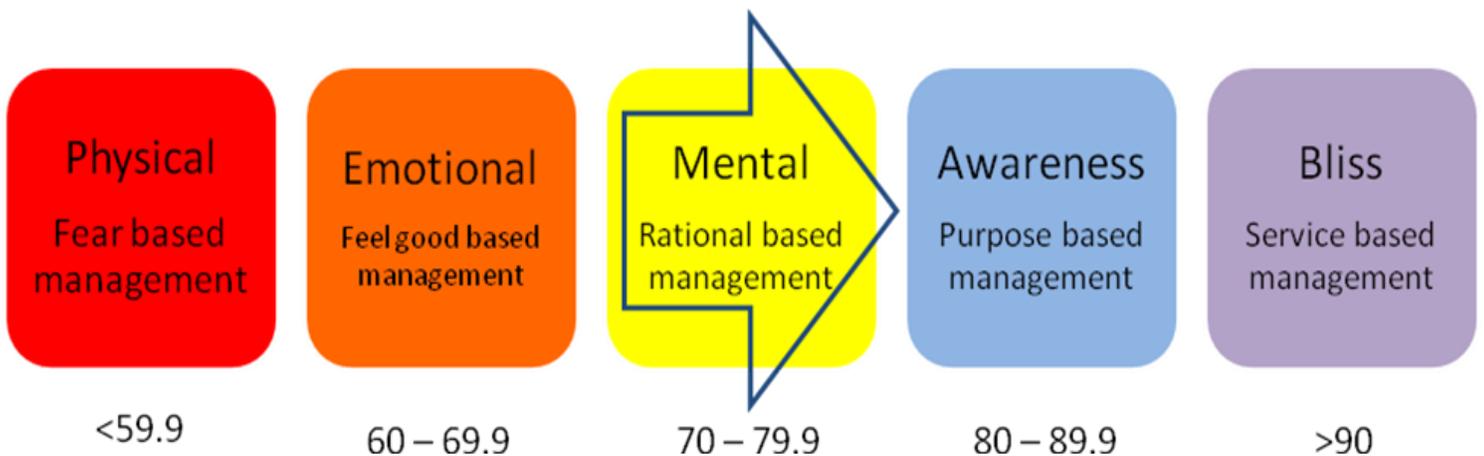
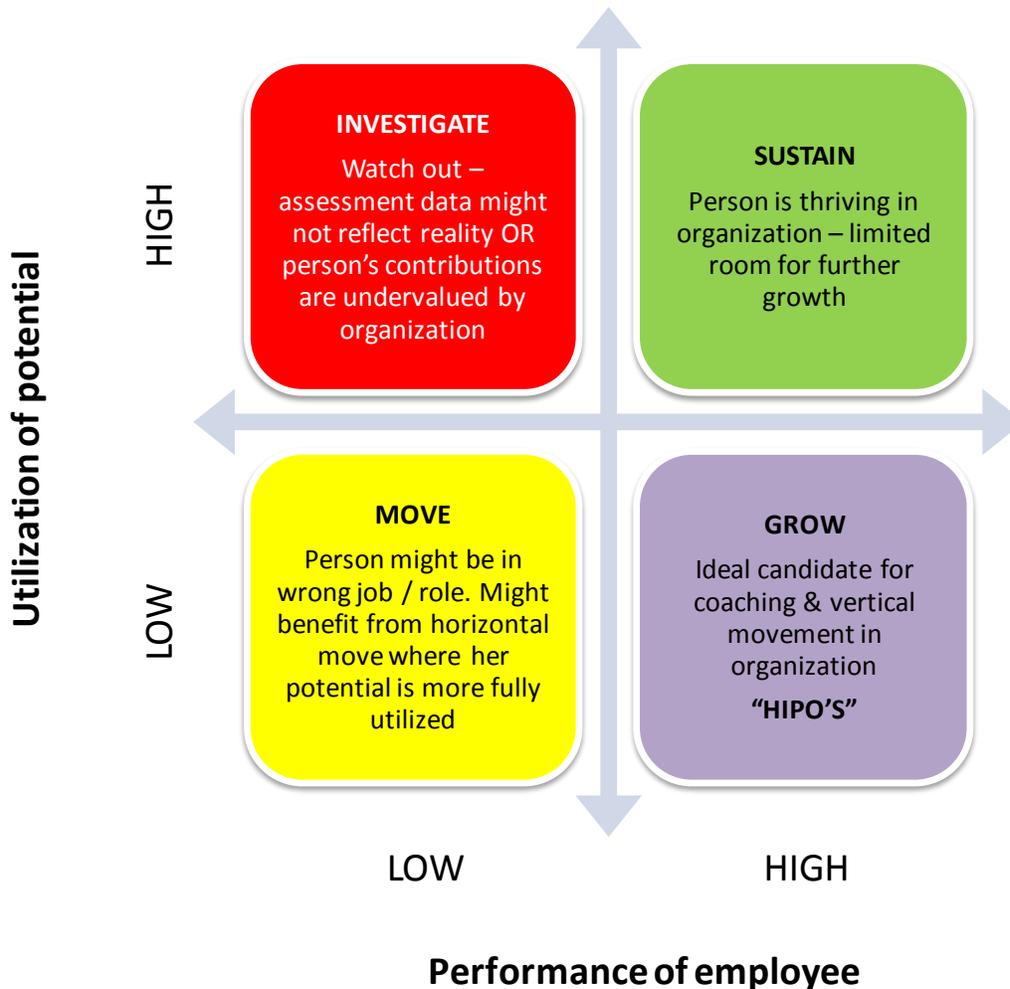


Figure 4

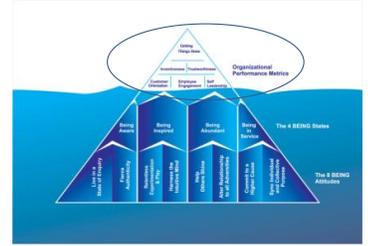
### 3. TALENT DEVELOPMENT STRATEGY FRAMEWORK:

The following framework is a useful way to think about managing the talent development pipeline. In today's environment, most organizations simply look at an individual's PERFORMANCE when determining their future growth opportunity. In others words they assume today's performance is a good predictor of a person's contributions going forward. Unfortunately this does not always lead to the best talent development decisions. Missing in this equation is what we refer to as the POTENTIAL of an individual (ie: their future ability to make a difference in the organization). It's only when we look at both vectors (how someone is performing today AND how they could be performing in the future when their potential is nurtured in the right way) that we get a true sense of how to grow an organization's talent pipeline in the most effective way. Therefore High Potentials, or HIPO's, might not always be those with the highest Human Potential score. Instead, we may be looking for the people who's potential is underutilized while still delivering good business results. The incremental impact they can have (as a result of coaching) is probably greater than any of the other groups.

## TALENT DEVELOPMENT STRATEGY FRAMEWORK



## 4. Organizational Performance



### Organizational Performance Metrics (OPM)

In the spider graph below we look at the top of the Iceberg and get insight into how COMPANY X is performing along the 6 key business drivers (OPMs): Trustworthiness, Inventiveness, Customer Orientation, Self Leadership, Employee Engagement and Getting Things Done. For definitions of the measures please refer to Appendix 1 on page 22.

Each of these performance metrics is further broken down on pages 10-12 to give more insight on how the organization is performing along these measures today and how it can benefit from growing along these axis in the future.

### Organizational Performance Metrics

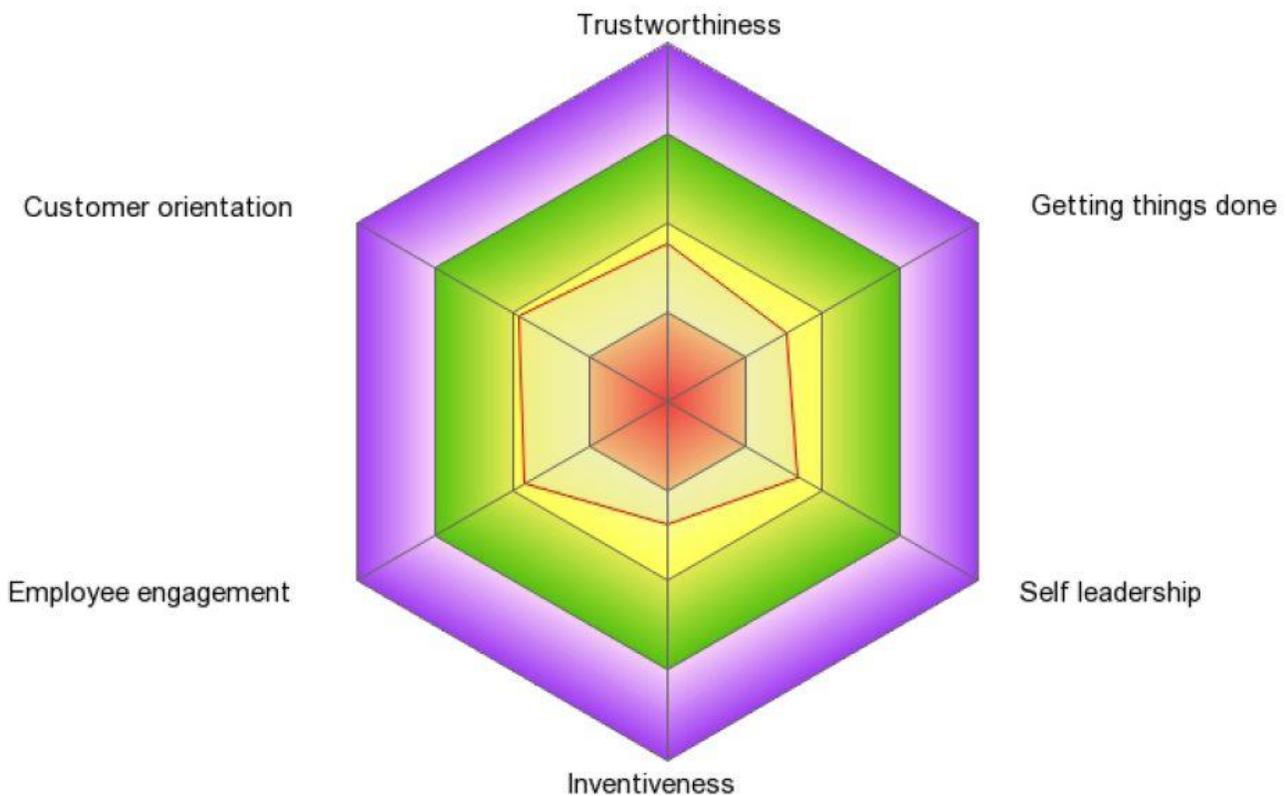


Figure 5: Organizational Performance Metrics

**Detailed findings 1: OPMs - Ranked by score (position of arrow indicates COMPANY X's score)**

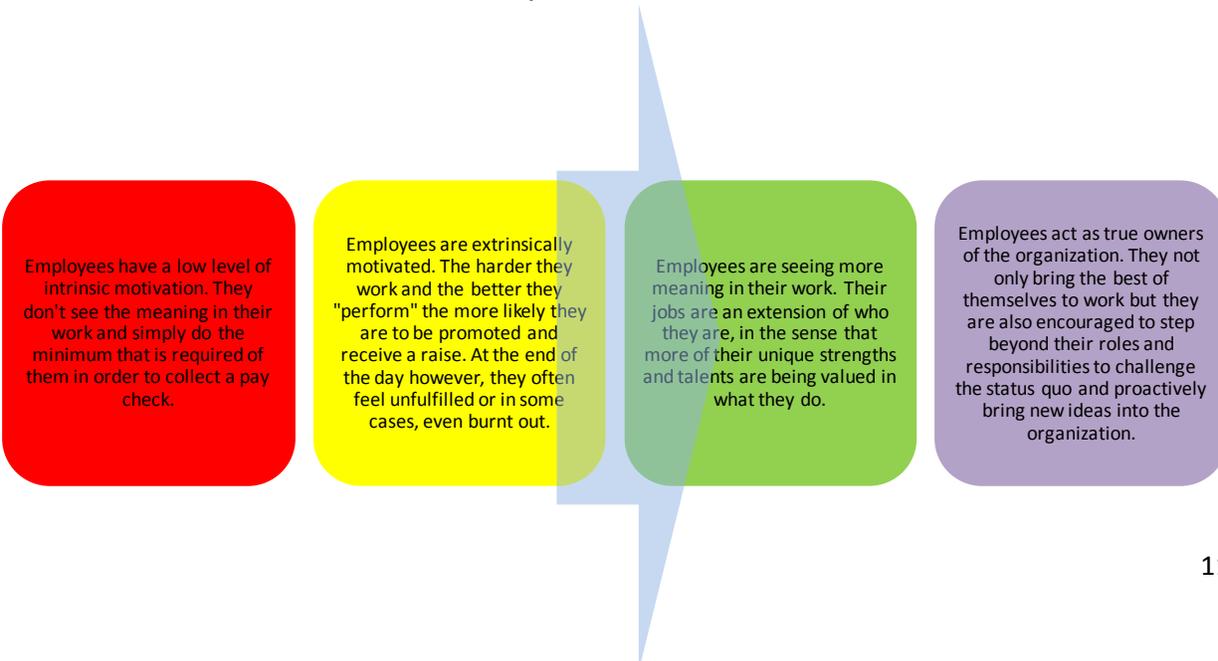
## CUSTOMER ORIENTATION:

Measures how well the organization listens and responds to the explicit AND implicit desires of its customers



## EMPLOYEE ENGAGEMENT

Measures the level of dedication and commitment exhibited in the day-to-day work activities





# TRUSTWORTHINESS

Measures the extent to which an organization is deserving of the trust / confidence it receives from its stakeholders



# SELF LEADERSHIP

Self-Mastery is about becoming an expert on yourself through a commitment to honest self-reflection and the ongoing process of learning and growing from your experiences.





# GETTING THINGS DONE

Measures and organization's ability to execute and deliver concrete results

The organization has an opportunity to be more bold and decisive in bringing their projects to life. It will likely benefit from more structure and a clear decision making process. Also, a sharper vision and strategy will help make choices and prioritize resources.

The organization is moderately effective at getting things done. There is a reluctance to move projects forward without reaching consensus. The risk tolerance is low and therefore some initiatives may not get the support they need to grow into their full potential. The expectation that something better will come along keeps the organization from fully committing to what they already have.

The organization is effective at getting things done. There are clear processes in place to speed up the decision making process but not everyone is willing, or feeling empowered, to take the necessary risks needed to move ahead purposefully.

The organization is extremely effective at getting things done. The deliverables are clearly defined and the main focus is on executing in the most efficient way. People are empowered to make decisions without lengthy deliberation. Such high focus on execution is critical in situations where speed to market is key. However, an over-reliance on this approach can be a watch out in environments requiring greater levels of creativity, collaboration and innovation.

# INVENTIVENESS

Measures the organization's ability to create and produce radically new products and services (that may or may not have direct market application)

The organization is ineffective at bringing new ideas to the market. An over-reliance on existing products and services may be sustainable in the short term but longer term a lack of new ideas will make it increasingly difficult to remain viable in the marketplace.

The organization is mainly focused on incremental Innovation. This consists of small, yet meaningful improvements in products, services, and other ways in which business is done. These tend to be the "new and improved" type innovations. We see them every day and they help extend product, service, and business life cycles and improve profitability.

The organization is effective at unlocking breakthrough Innovation that gives consumers something demonstrably new (beyond "new and improved"). Breakthrough innovation produces a substantial competitive edge for a while, although the length of time anyone can maintain such an advantage is growing increasingly shorter.

The organization is poised to deliver transformational Innovation, the kind that creates completely new industries and transforms the way we live and work. Rather than addressing an existing need, transformational innovation has the potential to significantly accelerate the adoption of an emerging trend in ways that other innovations can't.

## Detailed findings 2: Organizational Performance Matrices

The above 6 OPM's are already quite useful in assessing the performance of an organization. However, in reality we know that these key business drivers are constantly interacting with each other, often creating tensions and forcing trade-offs in management decisions. The following three findings provide insight on how COMPANY X is currently working with these tensions and the opportunities available to them when we manage to balance the different priorities more effectively.

### Tension 1: Getting Things Done vs Trustworthiness

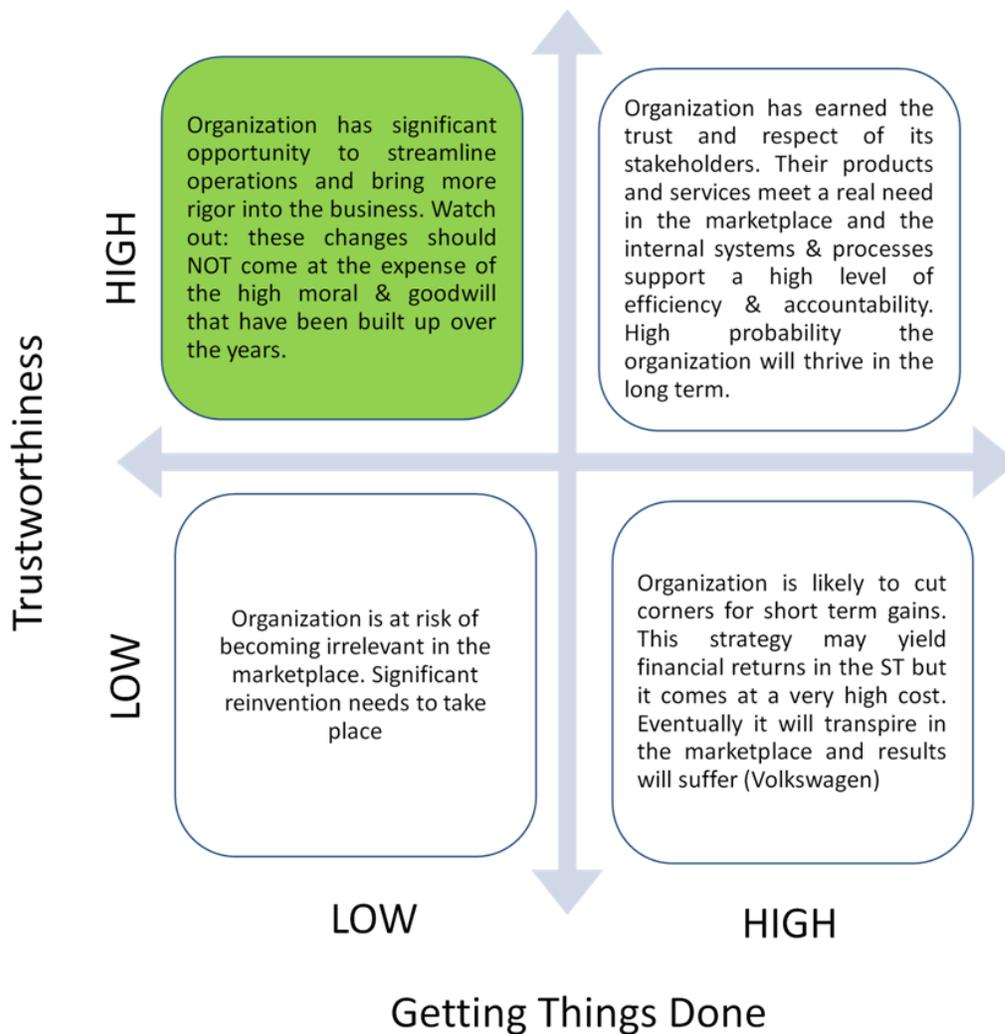


Figure 6



## Tension 2: Employee Engagement vs Self-Leadership

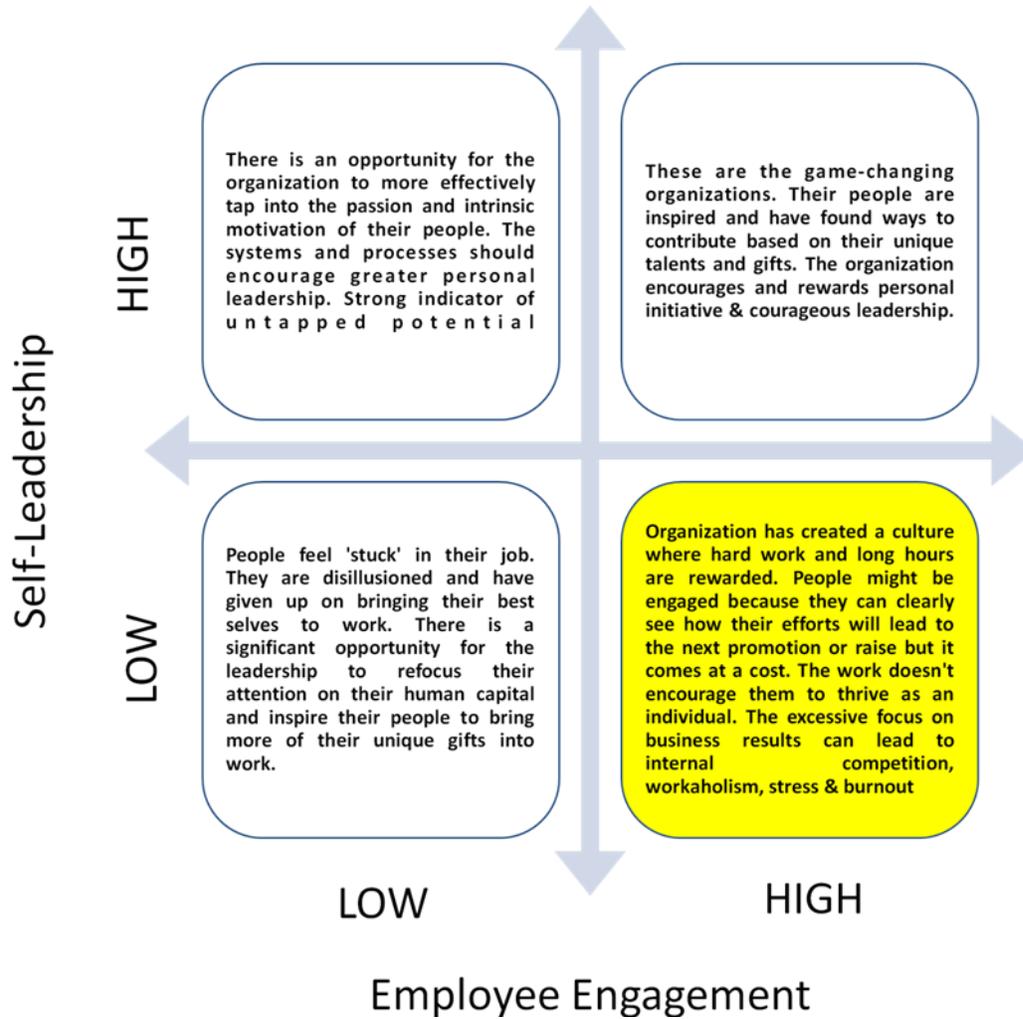


Figure 7



### Tension 3: Inventiveness vs Customer Orientation

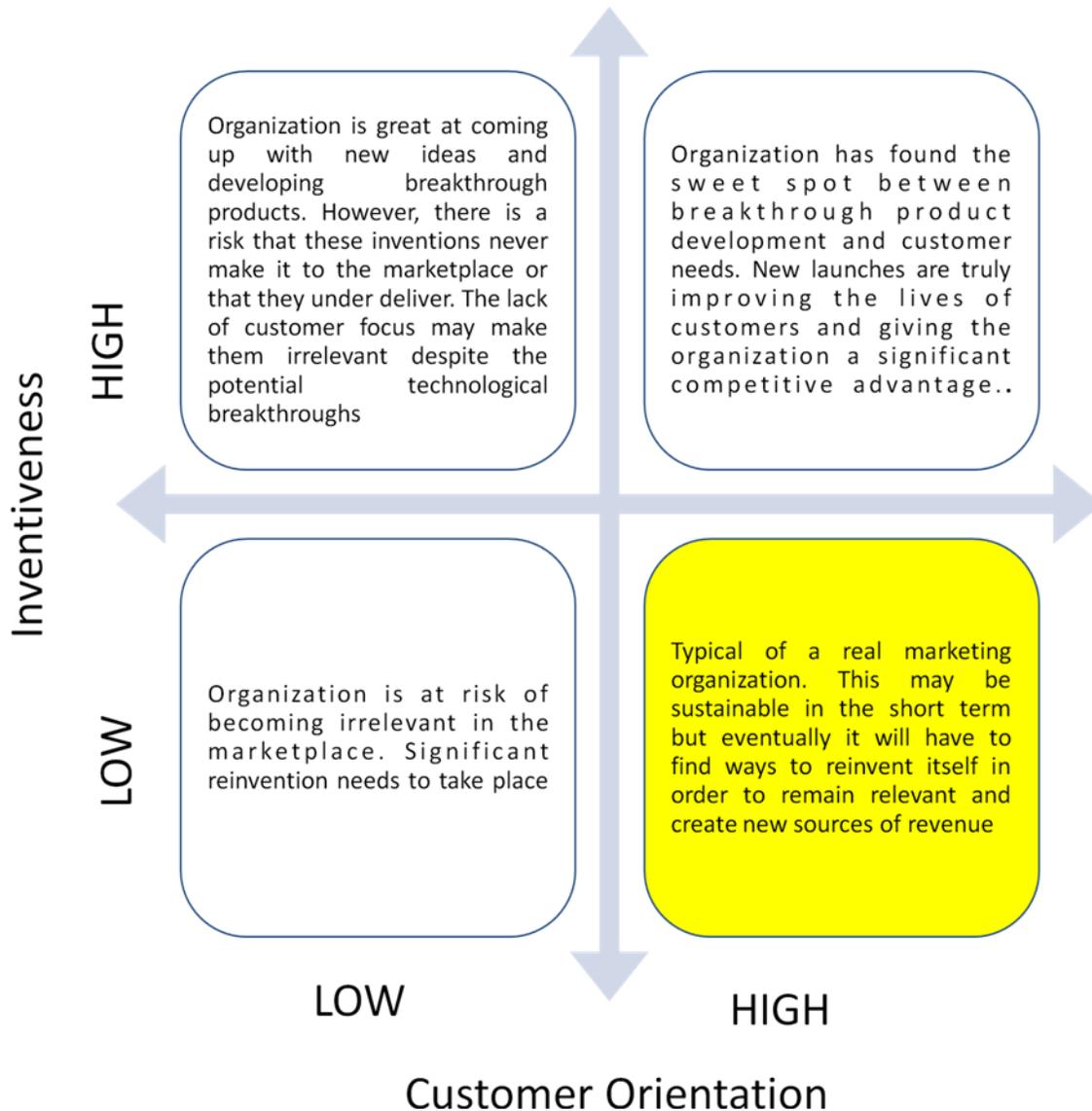
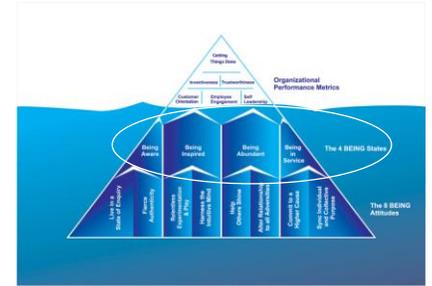


Figure 8

## 5. The Human Experience



In this part of the report we go one level beneath the surface and explore the deeper human dynamics at play in the organization. Specifically we measure the extent to which the collective HUMAN POTENTIAL is utilized. The more this is expressed the more fulfilling the work experience will be. For this we use a model where maximizing Human Potential is directly dependent on triggering four "States"; BEING Inspired, BEING Abundant, BEING in Service and BEING Aware. (see Appendix 2, page 23 for the definition of each of these States). Within each State are a number of Dimensions to help you understand the levers of Human Potential realization and pinpoint the areas that will have the greatest impact on the future development of the organization (see Appendix 2 for a short description of the Dimensions).

### COMPANY X overall HUMAN POTENTIAL Utilization score:



Figure 9

#### Key Finding:

Human Potential of COMPANY X is moderately utilized. There are occasions when the organization glimpses its peak HUMAN potential, yet this state of high potential is not a habit yet. At this stage significant leaps can be taken with a greater commitment to self-development and creating the conditions for more of the unique talents and gifts to shine through in the work environment.

**Detailed findings 1: Human Potential Realization broken down by the 4 BEING States and 23 Dimensions:**

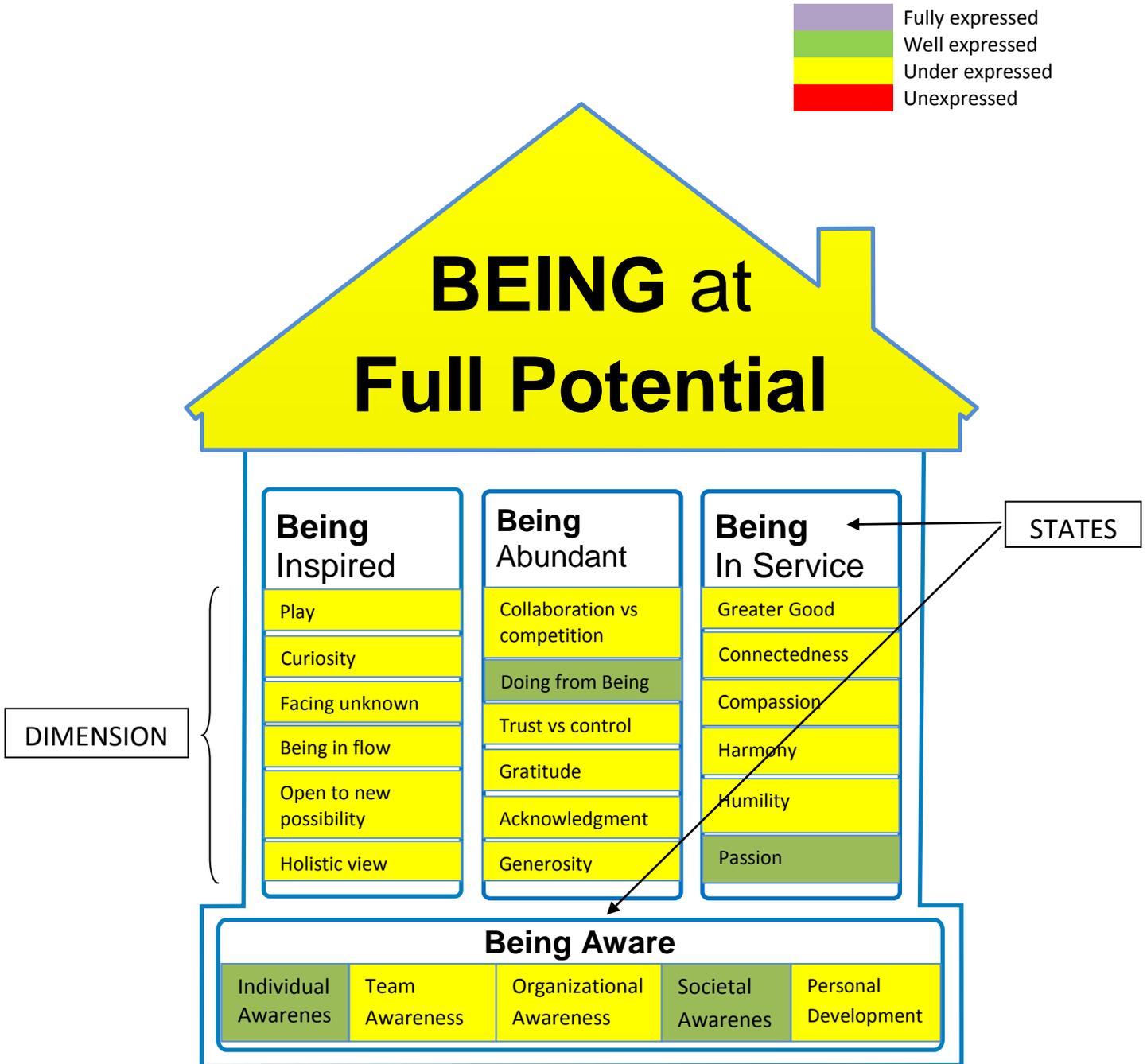


Figure 10

## Detailed findings 2: Opportunity areas - Most expressed and least expressed aspects of the COMPANY X'S Human Potential:

This section highlights the aspects of the organization that are most expressed and those that are least expressed. Please be careful not to interpret these as strengths or weaknesses but rather as inherent potential that the organization may or may not have been able to access yet. By looking at the top and bottom 3 dimensions from this perspective, it is possible to start prioritizing future areas of development that will further unlock the human potential of the organization and create a compelling work experience.

Individual Awareness:	83
Passion:	77
Societal Awareness:	76
Doing from Being:	76
Acknowledgment:	74
Connectedness:	73
Collaboration vs. Competition:	73
Compassion:	73
Team awareness:	73
Facing the Unknown:	73
Greater Good:	73
Being in the Flow:	71
Generosity:	71
Curiosity:	70
Humility:	70
Open to New Possibilities:	70
Holistic view:	69
Gratitude:	69
Play:	68
Personal Development:	68
Trust vs. Control:	67
Organizational awareness:	65
Harmony:	64

### Top 3 Dimensions expressed:

- **Individual Awareness:** [The extent to which an individual is aware of his or her unique gifts and has chosen to live by them ] is 'Well-Expressed'
- **Passion:** [Fire in the belly ] is 'Well-Expressed'
- **Societal Awareness:** [Measures the amount of concern an organization has towards society and environment (planet) ] is 'Well-Expressed'

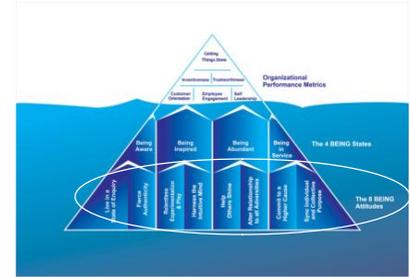
### Bottom 3 Dimensions expressed:

- **Harmony:** [The ability to create sufficient space for reflection and self care. ] is 'Under Expressed'
- **Organizational awareness:** [Measures how inspirational and how well understood the organization's vision / purpose is ] is 'Under Expressed'
- **Trust vs. Control:** [Measures how comfortable the organization is with uncertainty, and the level of trust employees have in themselves and their ability to stretch beyond their comfort zones into new opportunities ] is 'Under Expressed'

#### Color coding

	Fully Expressed
	Well Expressed
	Under Expressed
	Unexpressed

## 6. Mindsets & Attitudes:



Finally, in the last part of the report, we examine the bottom of the Iceberg and get more insight on how the organization is doing on the 8 key leadership ATTITUDES. They are the attitudes and mindsets that we need to adopt in order to further enhance the HUMAN EXPERIENCE of working within the organization and as a result, create the conditions for a new wave of value creation to emerge. The following spider diagram illustrates how COMPANY X is currently doing in this respect. See appendix 3 on page 24 for detailed definitions of the BEING Attitudes.

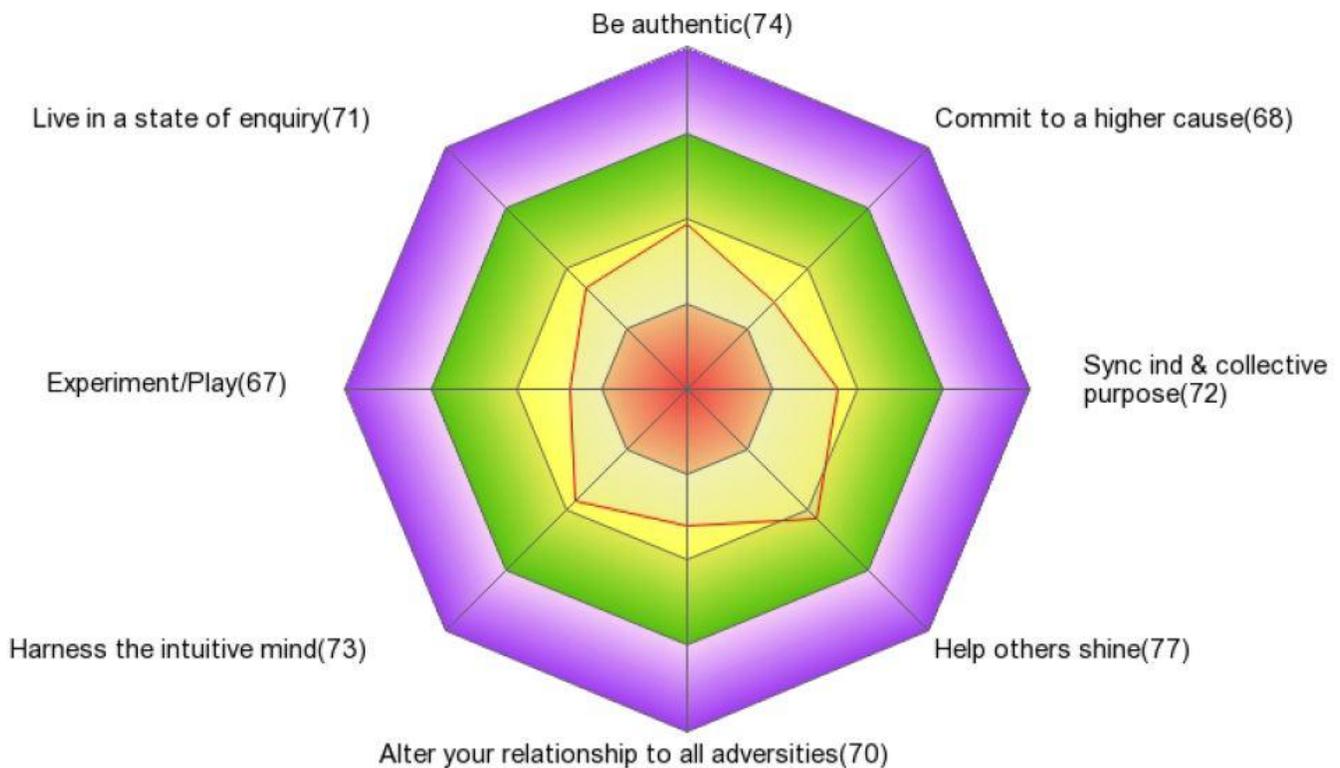


Figure 11



**BEING Attitudes ranked according to their adoption in the organization:**

The following analysis helps identify the attitudes and mindsets that are already present in the organization as well as those that can be further strengthened. Putting in place the conditions for people to experiment and ‘try on’ these new practices will very quickly start to impact the overall working experience of the people around them. As this improves, the level of engagement will increase and eventually the results will follow.

<b>BEING Attitude / Mindset</b>	<b>Score</b>	
Help others shine	76	} Top 2 attitudes to leverage & strengthen
Be authentic	74	
Sync individual and collective purpose	72	
Question existing beliefs	70	
Commit to a higher cause	70	
Alter relationship to all adversities	69	
Turn ideas into action	68	} Bottom 2 attitudes to experiment with & develop
Experiment / Play	67	

## 7. Next Steps:

### Human Potential Methodology

The assessment and this report is an important first step in an organization’s journey of self actualization. It is an effective way to acknowledge where it is today in terms of Human Potential Realization and what it needs to focus on in the future in order to further grow into its full potential. The next phase, as illustrated in the following diagram (Human Potential Methodology), is DISCOVERY.

DISCOVERY is about processing and integrating the insights so they can be transformed into actionable next steps, fully owned by the organization. During these ‘Discovery’ workshops the client is invited to look deeply into the current beliefs and assumptions that drive their business decisions today and make very deliberate choices on who they want to BE going forward.

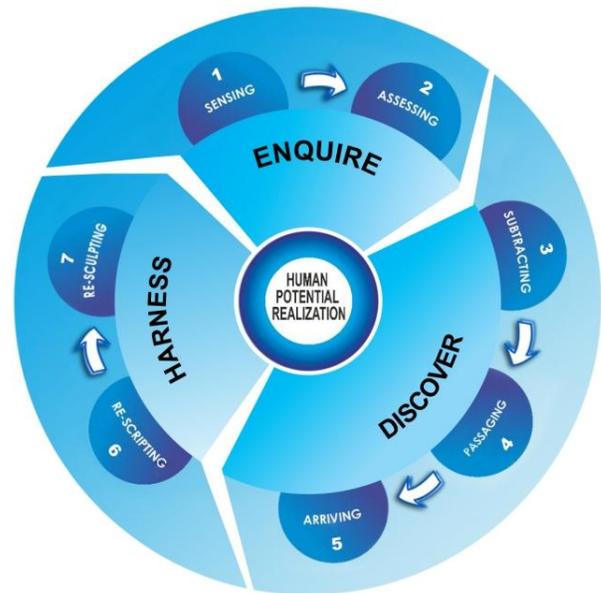


Figure 12

This typically involves “**Subtracting**” (the process of understanding the disconnects – or the shortfalls – along the various states and dimensions of the HUMAN POTENTIAL Assessment Model), “**Passaging**” (releasing control of the familiar processes used to arrive at solutions) and “**Arrival**” (seeing opportunities in uncertainties and allowing new possibilities to reveal themselves).

Finally, in the HARNESS phase, the organization is encouraged to visualize and speak about its new intentions in full details (via town-hall meetings or other) and start shaping them into a new implementation plan (**Re-scripting**). Targeted training and coaching programs are rolled out at the individual and group levels to make the new inner states a reality. Collectively new language and customs are adopted so that employees are engaged in more empowering ways. Management embraces new leadership habits, and the new consciousness is reflected in the management objectives and tools, like in the Business Balance Score Card (**Re-sculpting**).

We look forward to supporting you in this process.

Thank you

Your BEING at Full Potential Team



## Appendix 1: Definitions - Organizational Performance Metrics

- **Inventiveness:** Measures the organization's ability to create and produce radically new products and services (that may or may not have direct market application)
- **Trustworthiness:** Measures the extent to which an individual and organization is deserving of the trust / confidence it receives from its stakeholders
- **Employee engagement:** Measures the level of dedication and commitment exhibited in the day-to-day work activities
- **Customer orientation:** Measures how well the individual and organization listens and responds to the explicit AND implicit desires of its customers
- **Self leadership:** Measures an individual's willingness to rely on their deeper values and principles when navigating the complexities of the organization
- **Getting things done:** Measures an individual's and organization's ability to execute and deliver concrete results

## Appendix 2: Definitions – BEING States and Dimensions

**HUMAN POTENTIAL SCORE:** Measures extent to which an individual or organization’s potential is being utilized

**BEING Aware:** The level of self-awareness, and the depth of understanding with which we engage the world

1. Individual awareness: The extent to which an individual is aware of his or her unique gifts and has chosen to live by them
2. Team awareness: Measures how well-articulated and well-received the team’s collective purpose is
3. Organizational awareness: Measures how inspirational and how well understood the organization’s vision / purpose is
4. Societal awareness: Measures the amount of concern an organization has towards society and environment (planet)
5. Personal development: Measures ones openness to (and the organization’s willingness to support) personal development as a means to more effective leadership & performance

**BEING Inspired:** The extent to which we are in touch with the greater potential of the business.

6. Play: The extent to which work is a joyful, creative experience
7. Curiosity: Measures the ability of the employee to look at the world with fresh eyes
8. Facing the unknown: Measures how willing an employee is to step into uncertainty in spite of the challenges they may be facing.
9. Being in the flow: The ability to remain centered even in challenging times
10. Open to new possibility: The ability to see opportunities even in difficult situations
11. Holistic view: Being able to step back and see the big picture from the perspective of the different stakeholders

**BEING Abundant:** Living in deep regard of oneself, of others and of the circumstances we encounter

12. Collaboration vs Competition: The synergy that is created when individuals and teams step beyond their own self interest in service of a greater purpose.
13. Doing from Being: Measures the extent to which the employees are applying their true potential in their day to day job
14. Trust vs Control: Measures how comfortable the organization is with uncertainty, and the level of trust employees have in themselves and their ability to stretch beyond their comfort zones into new opportunities
15. Gratitude: Seeing the goodness even in challenging situations
16. Acknowledgment: The ability to see the positives in people and situations and acknowledge it
17. Generosity: The openness to give to others without expecting anything in return.

**BEING in Service:** Running a successful business in service of the greater good.

18. Greater good: Deeply caring and committing oneself to a greater good.
19. Connectedness: The ability to experience the world as a web of interconnected relationships.
20. Compassion: The ability to open our hearts and see the world from another person’s perspective.
21. Harmony: The ability to create sufficient space for reflection and self care.
22. Humility: Accepting that our thoughts and the way we choose to respond to a situation is the only thing we can control.
23. Passion: Fire in the belly



## Appendix 3: Definitions – BEING Attitudes & Mindsets

- **Be authentic:** Measures how truthfully and openly the individual and organization reveals itself to its various stakeholders
- **Live in a state of enquiry:** Measures the individual's and organization's willingness to honestly reflect on their own thinking and assumptions when challenges arise
- **Commit to a higher cause:** Measures the extent to which the individual and organization is able to align ALL of its activities behind an inspiring long term vision
- **Sync individual and collective purpose:** Measures an individual's and organization's ability to leverage the passions and talents of their people in order to meet and exceed the deliverables of the organization
- **Alter relationship to adversities:** Measures the individual's and organization's willingness to accept and open-heartedly engage with any challenge that comes their way
- **Experiment / Play:** Measures the extent to which an individual and organization embraces uncertainty and genuinely encourages playful experimentation
- **Harness the intuitive mind:** Measures the ability of an organization and its individuals to access a deeper knowing in order to navigate through complex situations and develop concrete actions
- **Help others shine:** Measures the extent to which an individual and organization believes in the potential of its people AND empowers them with responsibility and ownership