



A Wetherhaven Production

Cultural Assessment of PlaceWare

This cultural assessment is the result of three months of work studying, creating, accepting input, and recreating until this tool was refined. I completely reworded and rebuilt my assessment tool, improving language, scales, removing a couple of questions, and adding a learning organization section. As I personally went through my assessment tool online, I had a chance to experience first hand whether or not the assessment made sense. I believe I now have a clear tool that is easy to answer. I believe this tool provides the foundation for a good cultural assessment. Through this process, I gained input to improve the efficacy of the tool and process.

Process

I collected the comments from my cohort team, Don, and from my personal experience using the assessment tool, and then rebuilt the survey. PlaceWare employees that took the original survey told me that some of the questions were too complicated and the language was unclear. Don told me the same thing. When I used the survey at Tillamook Creamery, and went through the survey with their director of communication, I found that the questions were not clear. Based on all of this experience, I made the adjustments that are now in the survey.

I added a description of what organizational culture is at the front of the assessment tool and reworded the introduction to make it clearer and more concise. I then reviewed the learning culture work I created, took the comments from Don and then built from that, an organizational learning assessment. I added this to the online assessment tool that I had amended to complete what I believe to be a comprehensive cultural assessment, broken down into specific areas of interest. These four areas of culture include Styles of Behavior in the organization, how do team members learn to fit into the organization, a general personality of the organization, and the organizations ability to learn.

Rather than go back to my organization and reassess using the tool, I personally took the assessment. I then reviewed the original assessment results and then used my answers combined with my insights into the organization to interpret the culture. The assessment is strongly from my perspective. When I see differences in culture from department to department or between the Mt. View location and Portland, I make note of this.

I feel it is critical to indicate that I looked at PlaceWare as an outsider coming into the organization. As I am new, I believe that my perspective is new, clear, and unjaded by longevity in the company. At the same time, I have been with PlaceWare for three months and have the insights of recently experiencing many of the issues addressed in the assessment.

As I answered the questions on the assessment, much of the reaction comes from my own experience. From this interpretation and the analysis of the results of this assessment work, I made specific recommendations about how to improve the culture to help drive the organization toward a learning organization. I believe that creating this style of organization will help PlaceWare capture and hold the lead in this rapidly growing new market.

Results of My Assessment

Styles of Behavior

This section is designed to discover how people behave in the organization. This would include leadership behavior as well as contributor behavior. My assessment for PlaceWare on each attribute is listed after the statement of the style. My recommendations will follow at the end of the paper.

- 1. Clear Direction:** Is the direction your organization is heading and the reasons for it heading that way clear? *Pretty clear*
I find that we are an organization in flux in Portland. There is some direction but it is not as strong a direction with clear mission, vision, goals and objectives as I would like to see. Integration to the PlaceWare vision is weak.
- 2. Personal Freedom to Act:** Do you have a lot of freedom to make decisions and act on them? *Lot's*
There is a lot of individual freedom to act without close scrutiny in my experience.
- 3. Personal Freedom to Risk:** Are you encouraged to be aggressive and take risks? *Medium High*
We are expected to stick out necks out as we are also expected to be the expert in our area of expertise and take leadership for solutions.
- 4. Department Coordination:** Are the different departments within your organization encouraged to work closely together? *Fairly Little*
It does not seem that the departments talk much or coordinate actions or plans.
- 5. Management Support:** How much do managers provide clear communication, assistance and support to the team members that report to them? *Average*
I find that if I want clear direction, I must ask for it. In sales, it is far clearer so overall, I would say this is a by department issue.
- 6. Micro Management:** Are you closely watched by your supervisor and need to follow lots of rules and regulations? *Very Little*
More than anything else, I am somewhat ignored. Maybe too much. Other departments have closer supervision.
- 7. Company Team Membership:** Do you feel more like a close family member to the company than you do to your work team? *Lot's*
I feel very little kinship to my team or division, but lots to the company. Those that have been with the company longer may feel more strongly about the work team.
- 8. Recognized for Performance:** Are you recognized and rewarded for your performance more than for internal politics and favors? *Always*
Very little favoritism or politics involved in performance compensation.

December 3, 2000

Page 3

9. **Conflict Resolution:** Do people usually come together to solve their own problems and arguments rather than have someone help? *Most of the time*
People seem to work things out on their own. I do find, however, if something is brought to the attention of a supervisor, it is not always supported nor is a solution supported.
10. **Open Door Policy:** Can you go to anyone in the organization for help rather than having to go through channels? *On average*
Totally depends on the individual. Some are not open, others are. Very spotty.

General observations of styles of behavior

This seems to be a culture where there is very little consistency in behavior or encouragement to behave. It is dependent on the individuals involved, not on the leadership of the division or the organization. Each operating unit has leadership that drives the behaviors within the unit, but these behavior styles are specific to the operating units. This leads to variability in how to go about working with others. This in turn creates an atmosphere of uncertainty and discomfort and little camaraderie. Add to this the lack of clarity on roles and authority, and you end up with team members that are less effective than they could be.

How do team members learn to fit in?

This section attempts to assess how people learn the business and learn to fit into the organization. This should provide some level of understanding of how people assimilate into the organization and how well this is done.

1. **Learning Structure:** Are you given a structured and formal training plan or do you go into your job with the expectation that you will learn on the job? *Little Structure*
The only place in the organization where learning seems to be more structured is in the event production area where team members must come up to speed quickly.
2. **Self-Study:** Are you part of a class setting with lots of other team members when you learn rather than individual learning? *Never*
I believe that individual training is the norm throughout the organization.
3. **Time to get it:** Is everyone expected to be trained within a fixed period of time rather than learn at own pace? *Sometimes*
This happens rarely. Most people are allowed to learn at their own pace. Again, as above, in event services, ramp up is done more quickly. In sales, it is not set, but survival depends upon getting up to speed quickly.
4. **Mentors:** Are you assigned a mentor or role model when you enter the organization rather than simply expected to get it on your own? *Never*
I never see mentoring. In some departments, I see supervision training team members, but a mentor being assigned is something I do not see.

December 3, 2000

Page 4

5. **Respect for your abilities:** Were you hired for your knowledge, skills and attributes rather than expected to mold to a preexisting model? *Highly respected*
There is no mold at PlaceWare. You are expected to exhibit your own talents as best you can to get the work done that is before you.

General observations of assimilation practices

There is no divisional template for assimilating people into the team as a whole, only on a unit by unit basis. We have little orientation, little inculturation, and little process. This leads to a lack of understanding of what each person does and is a hindrance to creating trust in the organization. This also creates inefficiencies, as team members do not know where to go for help and answers.

Organizational Personality Style (very much like individual personality style)

This is a simply snap shot to get a feeling of whether the organization is an analytical organization, an expressive organization, an amiable organization or a driver organization. This simply provides another glimpse into the style of the organization.

1. **Pace:** Is your organization a fast paced or slow paced organization? *Go get em*
On a scale of slow to fast, we tend to be on the fast side in all departments.
2. **Committees:** Are decisions a committee affair or do individuals take action?
Usually in group
In contrast to the fast pace which I believe is driven by the industry more than an inherent attribute of the company, decisions tend to be made in groups. This will depend on the department.
3. **Social:** We are like a family and invest lots of time supporting each other.
Sometimes
We do not seem to have much of a social atmosphere. Team members stay to themselves most of the time except for small cliques.
4. **Task:** Our noses are to the grindstone and we do not fool around. *Most of the time*
Team members tend to be preoccupied with task and focus on getting the work done.

General observations of organizational personality

I would say the organization leans to the analytical/driver side of the scale. The orientation toward task and away from a more emotive atmosphere would put the style on this side of the line. The organization on this side of the scale would lean towards the driver side but not too far. We tend to have decisions by consensus, which moves the style to the analytical side and slows the pace even if the market and industry are driving fast pace.

Organizational Learning

These questions attempt to discover how well the organization learns and how well it has created an atmosphere in which a learning organization might thrive. Is there a lot of organizational learning going on or not?

1. **Failure Accepted:** Failure is looked on as an opportunity to learn and grow rather than hidden or used as a reason for personal punishment. *On average*
There is not an overwhelming acceptance of failure. I would say, fail at your own risk.
2. **Try and Test:** Team members are expected to try new ideas and push the envelope of the way it is done here. *On average*
Ties in with failure, there is some risk aversion as it is truly fail at your own risk.
3. **Processes:** We have discovered how to integrate in new ways of doing things and have created processes so that we can repeat and improve our successes.
Sometimes
We have an interest in developing processes but they are weak now.
4. **Empowerment:** We are encouraged to study, learn, explore and use this ever-increasing level of personal power to build the organization and ourselves.
Sometimes
No educational support and seems to be little interest in continuing education. Just do your job seems to be the motto.
5. **Empathy:** When others are having difficulties or searching for resources, people in this organization actively look for ways to provide help. *Sometimes*
Again, few will come to your rescue if you are having trouble. Sink or swim and just get your work done might sum it up.
6. **Assessment:** We assess personal and organizational performance on a regular basis and use the results to make improvements to performance. *Sometimes*
Assessment is weak. We are an MBO organization but I was asked to develop my objectives without a complete understanding of how they fit into achieving organizational objectives. One of my major complaints about MBO, is sub-optimization. MBO often drives behavior away from interdepartmental coordination.
7. **Persistence:** Team members see their missions through to completion even if there are roadblocks and resource limitations. *Most of the time*
As we tend to be task oriented, most people are persistent in getting what is before them done. I believe this is a strength and should be fostered with better support and leadership.
8. **Sense of Urgency:** In our company, there is passion for improving the ability to serve and deliver value to customers inside and outside of the organization.
Most of the time
This is spotty at best. Very strong in event management and Portland sales and weak in marketing. Internal customer relations are weak no matter what.

December 3, 2000

Page 6

9. **Vision Driven:** In our company, team members make decisions that drive all performance to fulfill our mission, vision, goals, and objectives. *On average* Definitely average. No outstanding performance here. Most do not even know what the mission, vision, goals and objectives are of the organization as far as I can tell.
10. **Ownership of End Result:** Team members in our company listen to each other and work together to create the best idea to solve the problem: i.e. ownership of end result rather than means to get there. *Sometimes* Lots of egos in our firm. Allowing the space for other to prosper and exert their own ideas does not seem to be common. Good in places, but not pervasive.
11. **Trust:** Leaders are able to lead and followers follow without reservation because in our organization, all people treat each other with courtesy and respect building strong bonds of trust. *Sometimes* I do not believe we have high degrees of trust. This is also spotty. Some managers are better than others. Treating people with courtesy and respect is lacking in particular. Common courtesy is not so common.
12. **Sense of Balance:** In our organization, we understand that there is life outside of business. People do not sacrifice themselves for the organization. Martyrs do not serve the long term best interest of the team or the organization. *Most of the time* People in our organization seem to keep life and work in balance and the organization encourages this. Good performance here.

General observations about PlaceWare's ability to learn

We do not have a strong set of attributes to be a learning organization. The California operation would fit this better. However there seems to be a pervasive attitude to just keep to yourself and get your work done in both locations. Lots of exhibited frustration and people do not come to each other's rescue. People look out for themselves.

Recommendations for Improvement

I would recommend several steps to bring this organization around to a more healthy learning environment. These recommendations will be made in the order of importance I give to each. Under each recommendation, there is a list of what can be immediately implemented to create positive change understanding that stopping the bleeding is as important as long term changes in process.

1. The organization needs to make sure that the mission, vision, goals and objectives are clear and well articulated. They should be in front of each team member so that they understand how the decisions they make have an impact on the performance of the organization. This will have an immediate impact on styles of behavior 1-8, will help team members be inculturated quickly, fit in, and provide the foundation and guidance to improve the learning organization attributes.

December 3, 2000

Page 7

- Immediately provide a clear vision, mission, goal, objectives, boundaries and resources available when work is assigned. This is a simple process and I have an excellent template in addendum.
 - Immediately communicate corporate vision, mission, goals, objectives, and values to the corporate departments and insure each department meets to review and discuss the direction of the corporation.
2. Due to rapid growth, the processes to effectively integrate people into the company must be a primary effort. Without this, all else will be wasted. This will make a substantial impact on inculturation and our ability to respond to growth.
 - Create and implement an orientation process immediately. This is to include introductions to all of the departments.
 - Provide a buddy (guide, mentor but not this formal, friend, helper) to the new hire so that they will have someone to go to for the day in and day out questions about our culture, politics, etc.
 3. Leadership needs to be accountable for creating a more trusting and open working atmosphere. There will need to be some intervention to make this happen, as the competencies do not exist within the organization to make this happen. Maybe training on what leadership is and how to develop it in others in the organization. This will have an immediate impact on creating trust, open communication, reducing fear, and building a customer focus.
 - Drafting a code of conduct can create an immediate impact, i.e., how we treat each other in the organization.
 - Provide a clear communication tool for assigning work that will also make an immediate impact by forcing quality communication. This template is in the addendum.
 4. The egos need to be controled and an environment where people can accept others' ideas is necessary to move to a higher level of organizational performance. This again will take outside intervention. "I am right and you are wrong" is the undercurrent.
 - Immediately institute the guideline that we are all to own the end result, not the means to get there. The guideline can provide an outline of the differences as well as provide examples of well-articulated dialogue.
 5. This company needs one strong dose of finishing school. There seems to be little idea of what courtesy and respect mean. One needs to beg to get a response to a simple question. Trust and rapport will never develop in the organization without this. I again recommend outside intervention to bring this awareness into the organization. This will have an immediate impact on trust and rapport.

- A quick remedy would be a communication guideline. Especially for voice mail and e-mail etiquette. The following could be the foundation for the guideline:
 - All messages will get a response within 24 hours, voice or e-mail. At least the recognition that communication has been received and the intention and guideline for action.
 - If it is urgent, communicate by voice mail. Routine by e-mail.
 - Messages addressed only to those intended for and copied to others for reference.
 - Large attachments avoided and recipient pointed to a URL to get document unless no alternative.
 - The bottom line is that no one is so important that it is OK to be rude and refuse to respond to someone that has taken the time to contact them.
6. A passion for the customer is necessary. Portland is bringing in outside help on this issue. This attitude needs to pervade the organization at all levels and drive to internal customer relations as well. There is an off-target attempt at customer relations improvement company-wide but it has not progressed to the point that all of the right questions are being asked. I believe that this process is an excellent start, but just a start. This improvement will create an atmosphere of continuous improvement and the trust necessary to risk and make breakthrough improvements with our clients and for our clients.
- The outside intervention that Portland has initiated is a step in the right direction. Mt. View needs the same type of intervention. This intervention needs to be expanded to inside customer relations. This is a major need and is not being addressed.
 - Internal, quick-and-simple workshops on supplier/customer relations within the organization is a great first step. I have the materials and this is a powerful tool in shifting the insights of the company-wide team. With so many new people coming into the organization, this is a critical issue.
7. Portland and Mt. View have completely different cultures. Within the whole organization, there are pulling factors splitting the company's ability to optimize performance. To move fast, we need to empower people to act in the best interest of the organization as a whole, but to do that, completion of the first recommendation is mandatory.
- A strong inculturation program targeted at the Portland office is necessary. This same program must expand throughout the organization and must include components of the history of the Portland operation.

December 3, 2000

Page 9

- This must include the history of PlaceWare.
- The vision, mission, goals, objectives, and values of PlaceWare.
- How to succeed in PlaceWare.
- The competition of PlaceWare.
- Where is the industry going to be in 1, 2, 3, 5 years and how we fit in?

Conclusion

Implementation of these recommendations must be aggressive. There is too much on the plate to create more change than this. Yet, creating and orchestrating this amount of change is necessary. Extending the effort would overwhelm the company, particularly since we are doubling in size this next year, going from 250 people to 500.

Here is how I would envision the execution of this change initiative:

- Small swat teams must lead the changes listed in bullets above.
- They must develop, train, and implement the suggestions with the support of the leadership team.
- These teams must be cross-functional and must band and disband quickly as the intervention can be quick.
- One of the teams is to be responsible for selecting company-wide outside intervention.
- I highly recommend Pecos River to create the personal readiness for change.

This is a strong and exciting company and its performance could excel with the added intervention to improve the above issues. This assessment and the recommendations listed are offered in the spirit of improving the capabilities of a very exciting company.

Addendum

Work Request

The attached outline was created in an effort to reduce the inherent miscommunication when receiving a request for work or when requesting work.

Objectives:

- 1) Insure the request for work accepted is consistent with the results expected by the person requesting the work.
- 2) Prevent miscommunication.
- 3) Provide the blanks that when filled in, insure the communication is clear.
- 4) Reduce the rework created when delivered work does not meet expectations.
- 5) Provide an easy to follow process for accepting and requesting work.
- 6) Provide questions to ask as we often forget to ask the important questions.
- 7) Improve relationships between internal suppliers and clients.
- 8) Improve our internal processes.
- 9) Reduce the stress we feel when we do not understand the expectations placed on us or deliver work that is not what was expected.

How to use?

If asking another team member to provide information, a service or a product for you, simply use this form to go over the expectations. Either the person receiving the request or the person requesting the work would fill out the critical information to insure the expectations are met when the work is delivered. When making a simple request such as a task, the process may take no more than a minute or so. It may not even require the form if both participants to the agreement are comfortable with clarifying the work request. If the request is a project or more extensive process improvement work, the discussion may be substantially longer to insure that a full understanding is reached.

To make the best use of this form, adapt to your department to insure that language and format is consistent with your work environment. This is simply an outline of the components necessary for a clear work request.

A hidden benefit of using a work request is the establishment of understanding and trust within the team. Misunderstandings are greatly reduced and the tool forces dialogue. Management learns coaching and leadership and an opportunity to mentor other team members helping them to develop leadership. It is contagious. Adapt and use and enjoy the benefits.

Simple Work Request	
Person Requesting Work:	
Request Made to:	
Date Requested:	
Date Required:	
Description of Work:	
Task, Project or Process:	
Review Dates:	
Envisioned Outcome:	
Objectives of Work:	
Budget:	
People Available to help:	
Resources Available:	
Boundary Conditions:	
General comments or discussion:	