



## **Riding the “Millennium Bang” through the SOQ and “Hits”**

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How does one communicate the results of a climate questionnaire to a group of over 100 people representing the organization that completed it? Can a consultant do it in a manner that promotes dialogue, shared understanding and concrete action plans? These were the questions and challenges facing me and my firm recently. In this article I'd like to explore how I dealt with these questions in a highly successful manner.

This article is aimed at outlining the practical application of the SOQ (Situational Outlook Questionnaire) in a project we worked on for our client. We especially want to explore the innovative approach we used to design and deliver the results in a large group session with the client. This work is part of the research initiative we are conducting to support the Italian validation of the SOQ.

### **Background Information**

The client was the Italian affiliate of a young and creative multi-national television network company striving to maintain its creative edge and leadership in their industry sector. The affiliate had already come a long way, but was striving to achieve an even more successful future. During the appraising task meeting it was clear to us that, although very animated and trustful, the client was passing through an eventful phase filled with a great deal of uncertainty about the future.

The affiliate's annual meeting, in fact, occurred at the end of a stressful year. The very existence of the company had been threatened by a change in the law governing the industry. In spite of the challenges faced during the year, the results were productive and exciting! Therefore, according to the Managing Director, the meeting was a crucial occasion in which to meet with all the employees to share information about the company's strategy and to make plans to achieve it. Now was a perfect time for “Idea Time” and to set up a two-way communication system among the departments that would take precedence over the frantic daily activities.

The Managing Director asked our company to solve a major issue related to the organizational development of this creative company. The issue was *“How to understand the current feelings of the employees and share the strategy for the*

*future during the annual meeting?" We were to do this at the annual meeting in a three-hour time span.*

**The original idea we had to address this challenge was to use the SOQ as an empirical tool to gauge some of the feelings of the employees. Our experience with the questionnaire in the past had been very productive and in small group settings we knew that we could use the results from the SOQ to facilitate productive dialogues and debates for our clients' employees. In this sense, the SOQ seemed to be the right tool to use, because of its validity and ability to create a forum for meaningful communication. Now the problem we needed to address was how would this lead into the strategy sharing that the Managing Director wanted to provide to the employees. Also how could we obtain their commitment to the strategy?**

Our thought was that we could do this in the three-hour window we were provided if we could engage as a team to support activities in the project. With this support we knew we could break the larger group into smaller sub-groups that could discuss the results of the SOQ. Then, as a team, we could use our talents to make sure that the issue of strategy in the organization would come to the surface of the discussions in a natural fashion. This would provide the segway needed to allow the Managing Director to put forward the new strategy and for us to then break into small groups, discuss the strategy and how it connected to the climate results discussed earlier. The results of these discussions could then be shared with the total group and we could help the group come to a common understanding of the strategy and what it would take for them to achieve it.

It was also clear that the time we had available for the overall meeting was short and it would be difficult to meet the objective of the Managing Director. This had to occur after lunch since the morning of the annual meeting was entirely dedicated to general management and functional presentations.

Therefore Decathlon Consulting's three-hour session, during the meeting, had the following objectives:

- 1.) Supporting the group's current development by enhancing the awareness of the situational outlook concerning creative strengths, possible weaknesses and suggested improvements.
- 2.) Facilitating the flow of information among the different departments of the organization regarding critical issues.

The starting point, we agreed with the client, had to be a full-color picture representative of the situational outlook taken by those who live it everyday.

Therefore, the 100 meeting attendees were invited to complete the SOQ, in their departments several weeks before the meeting.

### **Method**

The tool used was the SOQ (Situational Outlook Questionnaire), developed by the Creative Problem Solving Group, Inc. (CPSB) based upon the work of Göran Ekvall. SOQ measures, in accordance with its underlying nine dimensions concept, the creative climate of a team, department, or organization. The authors of this article have translated and validated the SOQ into Italian. This reliable and valid questionnaire, under the authorization of CPSB, is used to map creative climate along a continuum ranging from Stagnation to Change-Orientation.

The SOQ was administered, processed, and scored two weeks before the meeting in order to have a big picture of the organization and smaller pictures related to each of the eight departments.

Let's take a look at how the meeting went, via the SOQ feedback and debriefing.

### **The Meeting**

The Agenda of the afternoon meeting was:

- Plenary: Does creative climate exist? Why research with the SOQ? What are the general data? (30 min.)
- Group discussion: The organization and our department's picture: pros, cons, priorities (60 min.)
- Plenary: Group presentations of validated diagnosis and priorities (30 min.)
- Comments and summary by the General Director (20 min.)
- Bingo: You hit the bull's-eye! (10 min.)
- Conclusions and focus on plans (30 min.)

In plenary, Guido Prato Previde outlined in a conversational and informal way what creative climate is and how it can be measured with the SOQ. It was a quick and easy-going presentation in accordance with the culture and expectations of the group. Moreover, the organizational results had been illustrated by showing the "kaleidoscope of the departments" (see below for a novel way of presenting results). That means that the opening presentation of organizational results did not contain any numbers, but only colors which had been assigned in accordance with the degree of Change-Orientation versus Stagnation.

**The people split up into six groups, which were heterogeneous, but with a greater representation of a given department. The aim of this session**

**was to validate and comment on the “big picture”, and to analyze the more specific picture of that department.**

Each group worked with the facilitator on the following activities:

- 1.) Guessing the organization’s positioning (a precise number) along the continuum by writing the score on a Post-it<sup>R</sup> along with some reasons why that score was chosen.
- 2.) By focusing on the departmental target, participants were asked to validate results, which were given back by the facilitator.
- 3.) Participants selected the most critical factors, which hindered creativity in the department (answers to qualitative question #2 of the SOQ). The vote was made using the “Hits” technique, where dots of different color were assigned by those internal or external to the department.
- 4.) Then, after sharing the results of previous voting, participants used the same technique to vote on the most important actions to be implemented in order to overcome the previously identified hurdles. This time, dots were of the same color because we wanted to focus on major issues. Those who wanted to add other suggestions were allowed to write them on a Post-it<sup>R</sup> and add it to a list.
- 5.) Participants prepared overheads and speeches to make their presentations in front of management and the other groups.

It must be remembered that, during the session facilitated by the authors and the team of Decathlon Consulting, the discussion of the data, department by department, was carried out within the small heterogeneous groups coordinated by a facilitator.

The following presentations, delivered by each of the sub-groups in plenary, were an opportunity for debate among the departments and fostered dialogue with the General Director.

### ***The Outcome***

Results showed that the overall organization was highly change-oriented. Indeed at the organizational level, all dimensions were painted in green! The positioning along the continuum Stagnation Change-Oriented is illustrated in Figure 1.

Table 1 shows the detailed results of the Organization.

Thus, at the organizational level, there are no dimensions of “suffering” (no red codes, or “bugs” as we like to call them). The only dimensions relatively “hot” (less change-oriented) at the organizational level were: Freedom, Idea Time, and Risk-Taking, where the organizational position is average (yellow).

Results, dimension by dimension, suggested the following considerations.

**Challenge and Involvement** is very high, the climate is dynamic, people feel self-actualized and therefore invest a lot of energy in their work. This high level of commitment spreads throughout the departments, as shown by a restricted range.

Also, **Trust** is high, people feel emotionally safe and therefore communication is generally open and direct (although this is not homogeneous in the different departments).

**Playfulness/Humor.** The climate is characterized by spontaneity and anti-conformism. People are likely to be at ease and to behave naturally; to laugh, tell jokes, and to enjoy working, which seems to be a common aspect throughout all departments.

The level of **Conflict** is very low. Despite a few interpersonal tensions, people are likely to respect one another (although not in every department).

**Idea Support:** People listen to one another and reciprocally encourage and support the undertaking of new initiatives in a constructive and supportive way.

**Debate** seemed to be at home in the organization. When people are enthusiastic about proposing their ideas, they are likely to constructively put into question their own (and others') points of view. Whereas, dimensions such as Idea Time, Freedom, and Risk-Taking are, at the organizational level, only intermediate.

**Idea Time**, the time dedicated to elaborating and developing new ideas, is not enough, although only intermediate. Meetings and occasions to exchange between professionals and departments are, according to participants, not enough, and in a few departments this dimension is even perceived at the stagnant level.

As far as **Freedom** is concerned, the discretionary power people might exert on their everyday duties is, although heterogeneous, overall intermediate.

**Risk-Taking** is perceived as average. People do not feel free to undertake audacious, although promising actions, in the face of uncertainty.

In a nutshell, most dimensions were considered hallmarks of excellence because they are in line with the business and future strategies of the organization. Among these dimensions are Challenge and Involvement, Playfulness, and

Debate. The three dimensions that are more critical (although intermediate) in comparison to the overall situational outlook of the organization have been easily explained when embedded in the history of the organization, and related to the most recent events of a future-oriented organization.

All groups generally validated the results, defining the organization as young and dynamic. People are willing, both personally and professionally, to be part of a challenging adventure. On the one hand, enthusiasm, humor, openness towards debate, creativity, and flexibility are the key words and values recurring in group comments. Perceived weaknesses include: too much improvisation, the lack of idea time, too few meetings between departments, and an aversion to risk-taking.

Generally, when asked to guess the positioning of the organization along the continuum stagnation-change, all groups judged the organization as even more change-oriented than was shown by the analysis of the quantitative data. This means that the organizational creative climate is overestimated because of a lively and stimulating climate and because of the fulfillment of working preferences and expectations. Quite amazing was the fact that, regardless of the general uncertainty, scores given by the employees were more positive than those given by management. Troubles probably stressed the upper part of the organization more than the groups. More research on this issue would be worthwhile, in order to analyze situations where there are clear gaps between the management and the group.

The meeting results were very productive and rich in stimuli for debate and future projects. Groups liked the method very much and appreciated the way it all went along easily and comprehensively. A bit of fancy and an air of expectation was created by the Bingo. Before final comments from the Director, we calculated the total score of the organization along the nine dimensions. The group that came closest to the actual score was celebrated as the best (or luckiest!). The Director was happy because he had the opportunity to talk with his people in an easygoing way about crucial points. Moreover, many ideas and options for further implementation emerged.

### ***Tips and Major Changes in the Way Results Were Presented***

It might be useful now to reflect on some novelty that characterized the use and application of the SOQ. These are unique and might be helpful for practitioners in this field.

- 1.) A chart, named "**Kaleidoscope of the Departments**" has been distributed to groups where results, dimension by dimension, for each department, were presented. They were shown without any numbers, but with different color codes. This is derived from an idea introduced in 1999 by the team "Decathlon" when presenting data to the client for feedback. It simply contributes to the normative data (the three organizational categories devised on the basis of their productivity and climate) different color codes to facilitate visual recognition. The color codes are green, yellow, and red, respectively for the categories change-oriented, average, and stagnant. On this occasion, the color code was the substitute for the mean score, in order to avoid comparison between departments.
- 2.) Another change, which has been introduced for the benefit of the meeting, was to "mirror" the theoretical range from 0-300 on a continuum, where each hundred (1-100, 101-200, 201-300) was painted with one of the three color codes. Usually we showed the position of the given group or organization on the continuum (calculated by summing up the means for each dimension, except for conflict that is subtracted, and by dividing the sum of the means by 9, the number of dimensions.) In this case, participants had to guess the positioning of their organization along the continuum (see Bingo).
- 3.) The SOQ consists of 53 closed questions (Part A) and three qualitative or open questions (Questions 1,2, and 3). The answers to these qualitative questions are a rich source of information about the way in which a given reality is managed, and sheds light on the most critical issues both relational and organizational. For this occasion, we made large photocopies of the transcriptions of participants' answers to questions 2 and 3, which were used in group discussions. The underlying rationale was that the answers to question 3 suggested the actions to be implemented to overcome the hurdles expressed in answers to question 2. Nothing new in itself, except the fact of visualizing for each group, in a large size, problems and solutions giving to them (with the help of the CPSB tool "hits") the assignment to share the diagnosis and to choose actions to correct the present situation!

**Last, but not least, we have tested that in our country the correct phrasing for the two poles of the creative climate continuum is "Change-Orientation" (instead of "Innovation") versus "Stagnation." This also**

**means that we avoid any confusion about different types of creativity while we are looking at a measure for change.**