

CASE STUDY

CURRENT AND FUTURE ORGANIZATION ASSESSMENT

OBJECTIVES

- to understand the current and future business environment
- to describe the preferred future and to develop learning plans to get there
- to solve current operational problems.

RECOMMENDATIONS AND ACTIONS

- Initial meetings with management to understand the context and timing of the requirement.
- Use of a short survey to determine employee attitudes and to ascertain their learning concerns.
- Development of a communications plan for the intervention and a process for a 2 day retreat.
- Facilitation of the retreat and advice to management on follow-up strategies.

RESULTS

We resolved a number of operational problems and developed a vision and an action plan based on the study of the salient factors in the environment. Moreover, we succeeded in creating a strong employees buy-on and a high level of energy and motivation. Management followed-up on action items and I am facilitating the next retreat in a month's time which will deal with major changes in the environment and the branch's response to these.

