LUKAS MICHEL
MANAGEMENT
INSIGHTS

THE GLOBAL EXECUTIVE SURVEY

BETTER KNOW RATHER THAN GUESS

Better management, organisations and work are invisible. It's like taste; one notices it when it's not there. The **Global Executive Survey** is the tool that deciphers the intangibles. We use it to create twins – the dynamic copies of real-world management and organization. With them, managers can view present conditions, anticipate opportunities, plan changes, test decisions, and transfer that experience into the real world.

Surveys provides the data to translate current reality into a new reality. As such, opinions turn into meaning, root causes replace symptoms and ideas turn into action. Surveys establish the observation points that create awareness. Higher awareness brings the clarity that leads to insights. Insights motivate leaders to act on their own. Focus of attention enables learning with action and higher performance as the outcomes. Insights naturally lead to the transition from current reality to a new reality. Twins make the current reality of management and organizations visible.

DECIPHERING THE INTANGIBLES
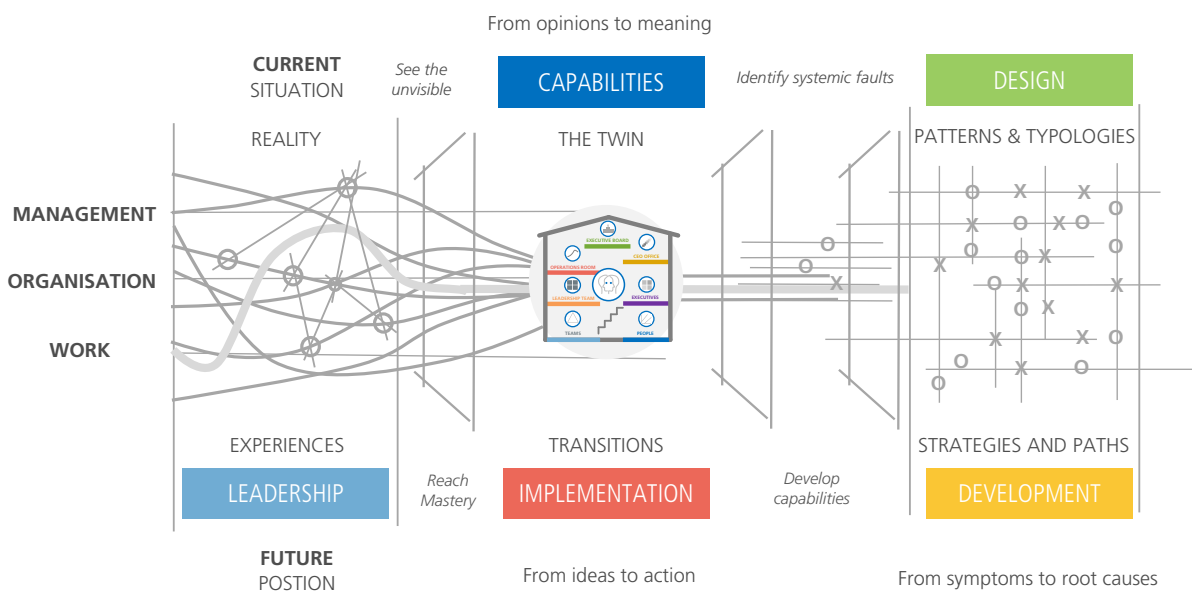
The survey follows the methodology for capability monitoring. Monitoring is the discipline to observe and alter capabilities. Distance, new perspectives, critique, and multi-voice input are integral part of monitoring. The survey offers the indirect measurement of capabilities as institutionalized, rules-based reflection with a non-routine practice.

The research: Nold, H, Anzengruber, J, Michel, L, & Wolfle, M (2018). Organizational Agility: Testing Validity and Reliability of a survey Instrument. Journal of Organizational Psychology, 18(3)

CAPABILITY MONITORING

Better management, organisation and work feature people-centric, agile and dynamic capabilities. Capability monitoring is the technique to observe, model and transform capabilities. In a systems view, monitoring and 'dynamization' can be treated as two separate functions (Luhmann, 1995). The science of Cybernetics calls this *second-order observing systems* (von Foerster, 1992). The way we do things becomes a subject of reflection and is opened up to alternatives. Through observation, capabilities become revisable.
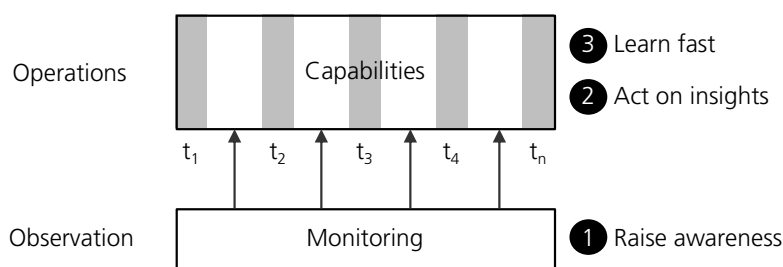
The survey establishes observation points. Monitoring is a discipline that can be used to observe and alter design. By observing (scanning) capabilities, potential faults and malfunctions can be spotted at an early stage. By becoming aware of critical signals, potential design requirements can be identified. In this way, leaders can decide whether or not to address certain issues. As such, monitoring initiates design changes relating to capabilities.

Surveys are the sensing tools that help you see the invisible: your potential, and the interference that keeps you from delivering your expected outcomes. Observation points help you identify the systemic relationships between the critical elements of your organization, to help distil your dominant assumptions, principles and patterns. Awareness turns opinions into meaning, to create purpose.

By observing (scanning) capabilities, potential faults and malfunctions can be spotted at an early stage. By becoming aware of critical signals, potential design requirements can be identified. With this, leaders can decide whether or not to address the issues. As such, monitoring initiates changes in capabilities.

Distance, new perspectives, critique and multi-voice input are integral parts of the monitoring. Taking a step back, observing and challenging the use of capabilities compensates for the risks of getting locked in. And so, organizations need to review their tools, routines and behaviours in view of their specific context.

Monitoring is risk management. The use of managerial tools and processes is selective. For every context, leaders select the specific systems that support them in managing their organization in that specific context. When the context changes, the toolbox also needs to change. Diagnosing systems, leadership

and culture prevents organizations from misapplying tools, ignoring critical events or being threatened by changes in their operating context.

Taking an arms-length stance, observation and critique of design and capabilities helps compensate for risks, such as thoughtless reproduction of organizational designs and capabilities through path dependency, structural inertia and lock-in. Early warning systems, including monitoring and reflection, can help reduce these risks. This first step, raising awareness, is such an early warning system.

People-centric principles, agile capabilities and dynamic systems are not directly observable. They require indirect measurement. Monitoring as institutionalized, rules-based reflection is a non-routine practice. If such monitoring is to succeed, it must be kept open; it must not become subject to closed-down routinization. Only then is it possible to detect extraordinary signals that call the validity of current design and capabilities into question.

Monitoring must include the internal and external environment. While internal factors can be identified, external factors are wide open and largely without boundaries. Crises are regularly preceded by weak signals. The interpretation of weak signals requires skills (Ansoff, 1980).

Design scanning and observation should follow systematic methods for generating, modifying and improving capabilities. The monitoring routines themselves need to be updated repeatedly to prevent traps and path-effects. Professional agile insights surveys ensure effective monitoring, with continuous investments in the tool to prevent these traps.

It is important to encourage all units, sub-units and individual members of an organization to actively participate in capability monitoring. Providing a supportive context and social climate is therefore a key task for effective monitoring. Leadership briefings establish the context and set the rules for a non-political approach to design monitoring.

Conducting the survey creates awareness and establishes a shared understanding of the context and the issues that require attention. Participating in the survey is a first intervention. Answering the questions triggers the thinking about *how we do things here* and what management looks like. Therefore, engaging people in the survey and the following steps means using the knowledge and brain power throughout the organization to work on the system.

Capability monitoring is too costly to own and perform in-house for most organizations. Consequently, it makes sense to use an outside supplier with expertise, experience and investment in professional surveys.

Ansoff, H (1980). Strategic issue management. Strategic Management Journal, 1, 131-148.

Luhmann, N (1995). *Social Systems*. Stanford: Stanford University Press.

THE SURVEY TOOLS

Capability monitoring with a professional, research-based survey tool creates awareness and the necessary insights for managers to develop people-centric, agile and dynamic capabilities.

The questions force participants to step back, observe from a distance and challenge the current management and organization in a non-threatening environment. As institutionalized reflection and non-routine monitoring, the survey detects weak signals and serves as an early warning system.

The survey is an online questionnaire for managers and employees that takes less than a half-hour to complete and is available with 33, 44, 65, and 71 questions. Unlike traditional employee surveys, the survey yields significant results with as few as seven participants. It's therefore not necessary to involve an entire organization, which would only create false expectations.

The survey is documented in *The Performance Triangle* book (Michel, 2013) with definitions of all factors, their visual presentation, their foundation in research, examples, business cases and tips for crafting the right design. The survey has been extensively tested in practice and validated through independent research (Nold et al. 2018).

Michel, L (2013). *The Performance Triangle: survey Mentoring to Manage Organizations and People for Superior Performance in Turbulent Times*. London: LID Publishing.

Nold, H; Anzengruber, J; Michel, L; and Wolfle, M (2018). Organizational Agility: Testing Validity and Reliability of a survey Instrument. *Journal of Organizational Psychology*, 18(3).

VISUAL THINKING AIDS

Survey result reports support every part of the process in form of executive summaries, workbooks for workshops, technical reports for the design, and guides for agile and people-centric development. 90 modules present the survey data in various ways.
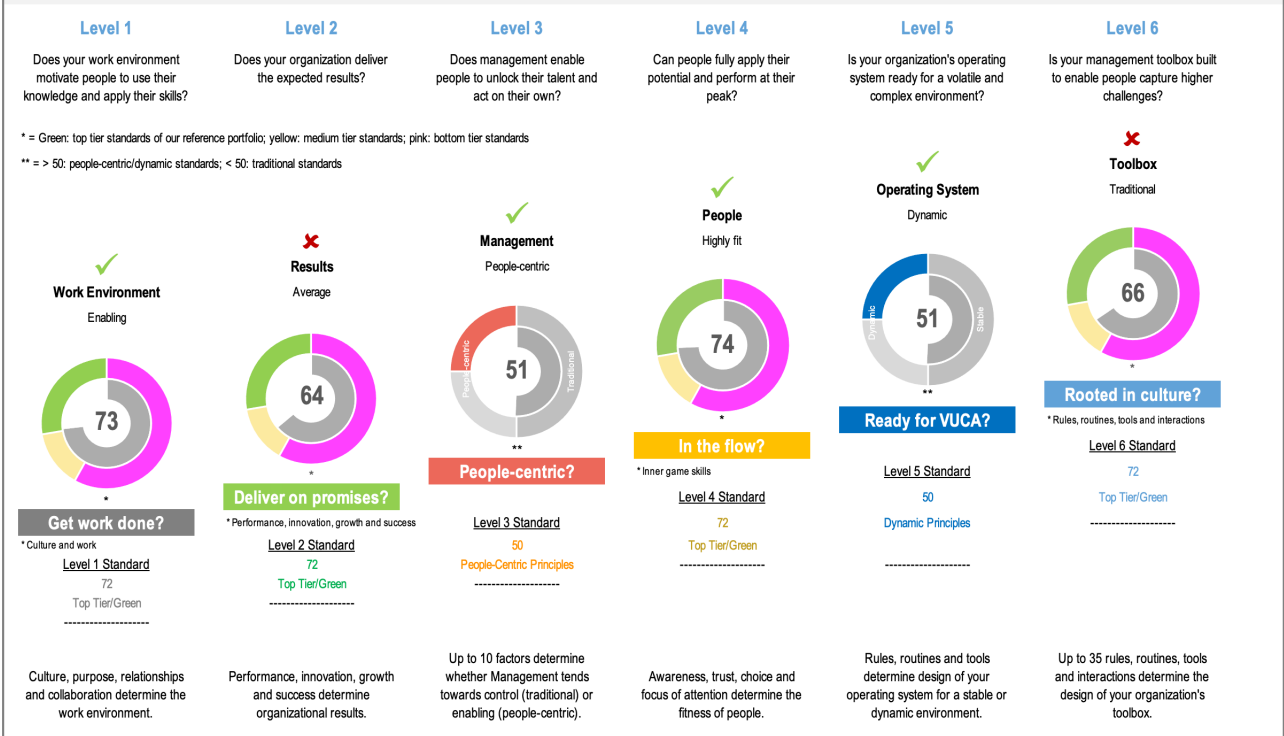
SIX FITNESS LEVELS

Six levels of fitness present aggregate scores with their specific thresholds. This is an example of a summary report on competitive advantage.
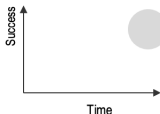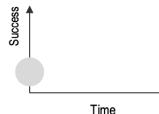
TRANSITION STRATEGIES

The transition strategy report is an example of a workshop guide that accompanies the survey results to offer structure with questions and serve as notes page.

TRANSITION PROCESS

What management successfully enables the transition?

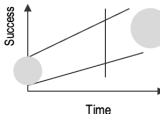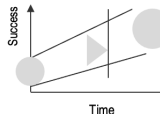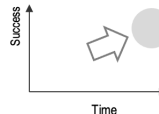| Step 1: Raise awareness		Step 2: Apply the insights	Step 3: Learn fast	
Understand *Why agile?*	**Decode** *Current capabilities?*	**Design** *Desired capabilities?*	**Develop** *Change capabilities?*	**Transition** *New capabilities?*
My assumptions? My principles?	My interferences? My potential?	My gaps? My key issues?	My initiatives?	My roadmap?
Framework	**Observation points**	**Focus areas**	**Leverage points**	**Transition Energy**

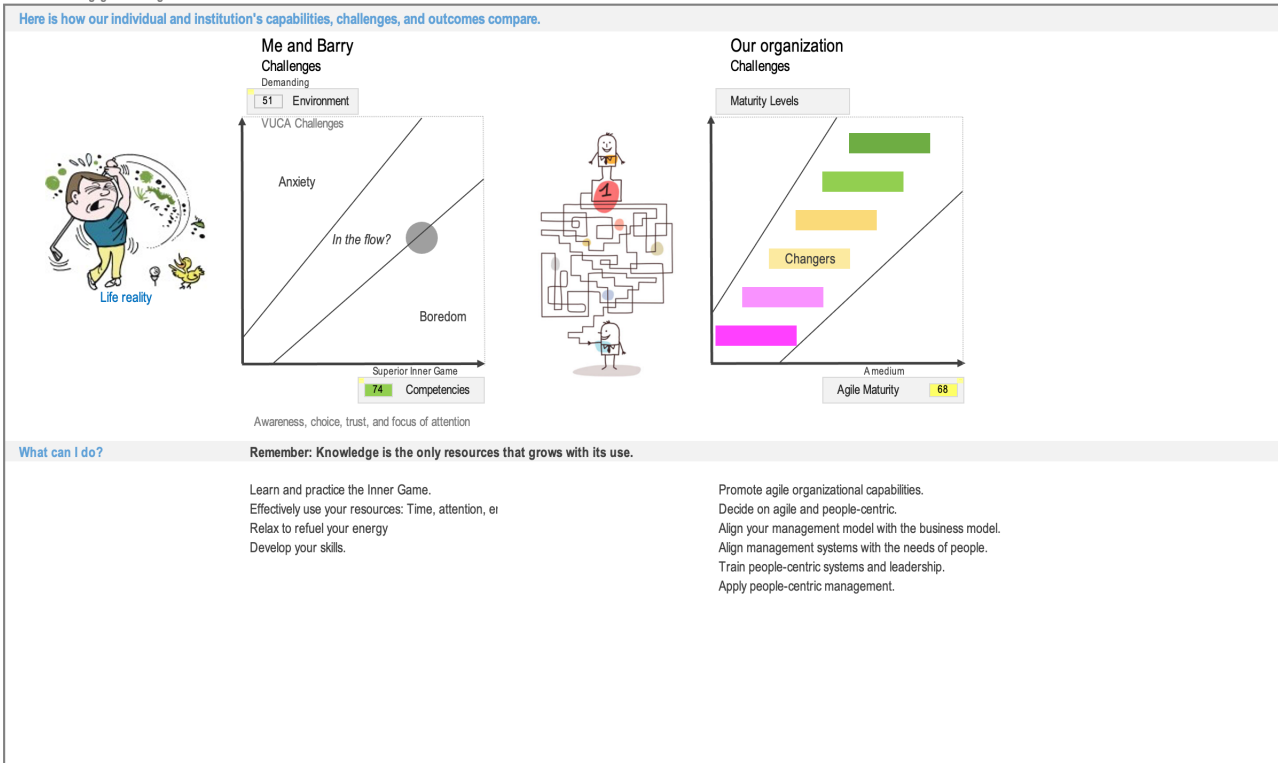| Framework	Observation points	Focus areas	Leverage points	Transition Energy
What are our dominant principles? How are we successful? What are our assumptions?	Where is the potential? What interferences prevent success? What is the current design?	What are the key areas that need my attention to close the gaps? In what context does my business operate in? What management model fits my context? What design is required for my environment? What is the design of my toolbox? What leadership style works best?	What are the initiatives to implement the new design? What model, capabilities, tools, and behaviours support the new design?	What is the roadmap to develop new capabilities? How are we developing the new capabilities? How do we lead the transformation?

PERFORMANCE AND FLOW

The *My Flow Scan* report supports individual coaching. This page compares individual and organizational performance combining flow and agile maturity concepts.

I, BARRY, AND OUR WORK

We want to engage in the organization and contribute.

Here is how our individual and institution's capabilities, challenges, and outcomes compare.

Me and Barry
Challenges

Demanding

| 51 | Environment |

VUCA Challenges

Anxiety

In the flow?

Boredom

Life reality

Superior Inner Game

| 74 | Competencies |

Awareness, choice, trust, and focus of attention

Our organization
Challenges

| Maturity Levels |

Changers

A medium

| Agile Maturity | 68 |

What can I do?   Remember: Knowledge is the only resources that grows with its use.

Learn and practice the Inner Game.
Effectively use your resources: Time, attention, en
Relax to refuel your energy
Develop your skills.

Promote agile organizational capabilities.
Decide on agile and people-centric.
Align your management model with the business model.
Align management systems with the needs of people.
Train people-centric systems and leadership.
Apply people-centric management.

WHY THE EXECUTIVE SURVEY

The following table contrasts the survey with culture assessments and employee surveys. The survey offers the non-routine assessment of dynamic capabilities. Culture Assessments evaluate gaps with predetermined culture attributes. Employee surveys identify faulty behaviours and flawed leadership.

The Executive Survey	Culture Assessments	Employee surveys
Holistic and systemic model	Fixed, simple models	Traditional control tool
For the CEO and business leaders and their teams	For organizations and their leaders; HR loves it	For leaders and teams, often driven by HR
Performance, innovation and growth	Organizational development	Leadership and employee development
Scalable set of standardized questions that allow for benchmarking	Fixed set of simple questions with the ability to benchmark	Tailored questions, which often means copy & paste from other material
Foundation in behavioural economics and system dynamics	Questions to fix leadership and work along pre-determined spiral themes	Questions are based on current issues for an input-output mindset
Dynamic capabilities	Culture	Satisfaction and engagement
Identify patterns	Evaluate gaps to given models	Evaluate gaps to set standards
Separates root causes from symptoms	Compares assessment results with given model behaviours and idealistic leadership	Focus on finding faulty behaviours and flawed leadership
Focuses on development action	Establishes desired models	Identifies who is at fault
Science-based, practice-proven and extensively tested	Published models, research-based and well-tested	With few exceptions, situational survey questions
AGILITYINSIGHTS, sold through exclusive certified survey Mentors	Culture consulting and headhunting firms; sold through subsidiaries and consultants	Consultancies and global survey establishments; sold through their consultants
Global benchmarking on all factors	Maintain comparative benchmarking databases	Some with large benchmark databases, others with none

THE FREE TWIN

GET YOUR TWIN

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