



WHITE PAPER

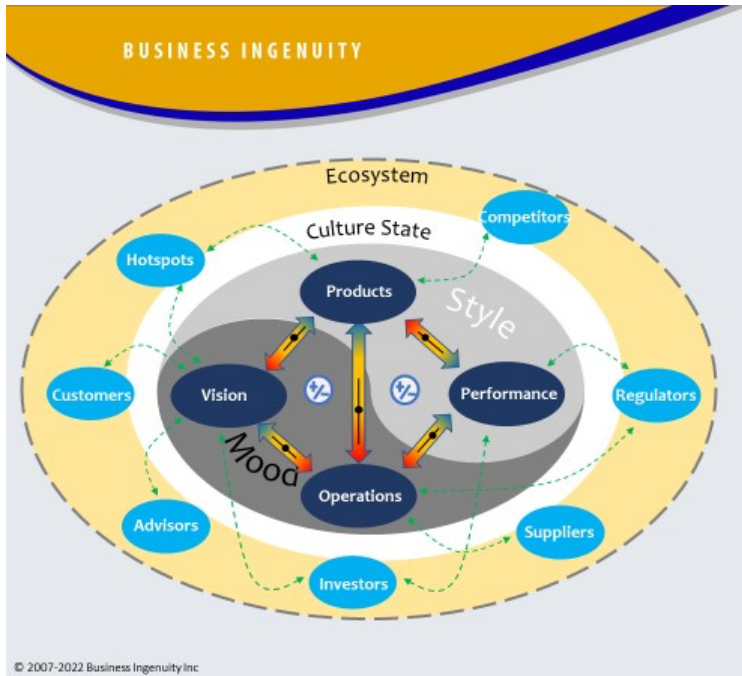
Product Description: Cultural Alignment Survey Evaluation (CASE)

Business Ingenuity's **Cultural Alignment Survey Evaluation (CASE)** is a tool for precisely measuring and analyzing two organizational capabilities that directly impact performance: *resilience* - essential for delivering products and services promised to customers, and *adaptability* - critical for 'turning on a dime' as threats and opportunities arise in the ecosystem.

The primary benefit of CASE is improved performance through enhanced alignment around the organization's *Strategic Framework*; the 'engine' that powers resilience and adaptability. CASE analytics provide depth and scope in examining alignment issues and providing insights for fixing problems related to poor business strategy, poor production quality, shrinking addressable market, etc. It is uniquely insightful in pre-acquisition due diligence, post-acquisition integration planning, and company transformation.

Strategic Framework

The key elements and features of an organization's Strategic Framework is illustrated in figure 1. As depicted, an organization's Culture State is influenced by the interplay of four key elements, as well as the ecosystem effects on those elements. Style and Mood, discussed in later in this document, have an important accelerant effect in terms of fostering virtuous and vicious cycles.



**STRATEGIC
FRAMEWORK**

- Feedback network
- Organizational alignment
- Virtuous / vicious cycle
- Strategic Framework Element
- Ecosystem element

Fig 1: BI's Strategic Framework

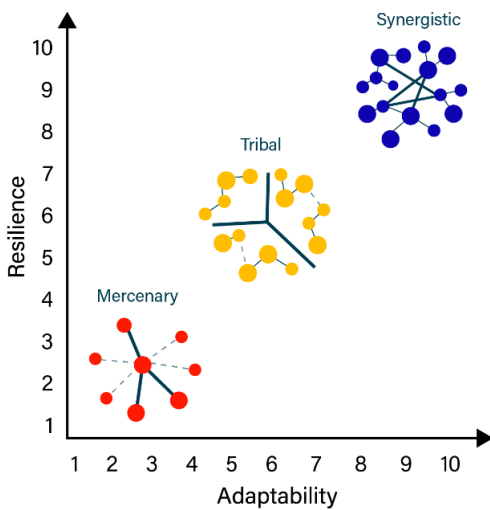
Business Ingenuity's strategic framework has been developed over years of applied theory from the fields of linguistics, sociology, anthropology, and more recently, systems dynamics and complexity science (see Appendix A for source material). The framework is fractal in its constitution; the four primary elements of Vision, Products, Operations, and Performance, can be found at every level of an organization.

How CASE Works

Our survey questions have been carefully designed to bring out similarities and differences in how employees view various aspects of the Strategic Framework and how it affects their day-to-day activities and decisions. Some questions specifically address resilience, others adaptability, and still others, the effect of Style and

Mood. Resilience and Adaptability scores are based on assimilated survey data and weighting schemas – which can be adjusted to reflect situations.

As depicted in figure 2, the intersection of overall scores for resilience and adaptability determine an organizations *Culture State*.



Synergistic: Organizations that are both resilient and adaptive. They have successfully aligned people to Vision, Products, Operations, and KPIs – and continue to evolve them as necessary, in tune with the ecosystem that defines them.

Tribal: Organizations that have strong connections within defined boundaries – resulting in pockets of disjointed resilience or inability to translate new opportunity within their ecosystem into Products and Operations that align well with Vision.

Mercenary: Organizations that are rigid and fragile due to their hub-and-spoke nature; they are at risk of being disrupted - without the means to maintain resilience and adaptability.

Fig 2: Culture States

Scores for resilience and adaptability range between 1 – 10; a score below 4 indicates weak alignment (red), above 8 indicates strong alignment (blue), between 4-8 indicates moderate alignment (orange).

Style and Mood

These two attributes act as accelerants, propagating virtuous or vicious cycles. **Style** is defined in terms of *what is most valued in the way of working*. CASE incorporates three dimensions of style:

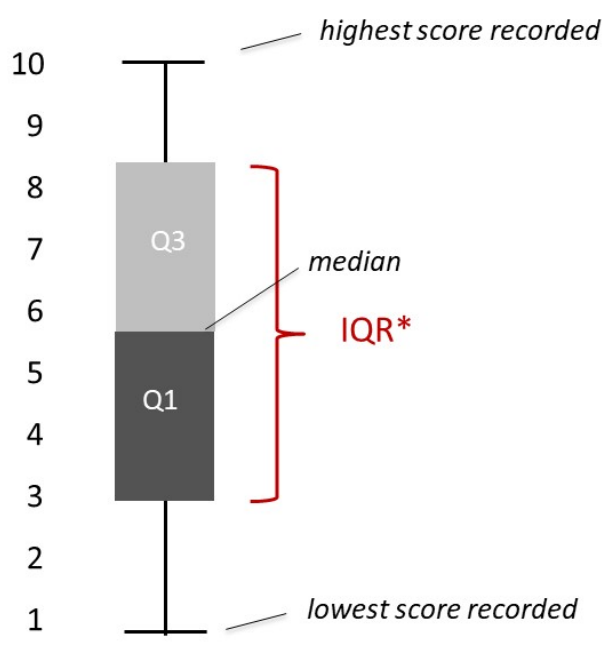
- *Decision making* – What is valued in how high-level decisions are made
- *Managing* – What is valued in how daily business is managed
- *Customer engagement* – What is valued in customer interactions

Mood is defined as *the prevailing attitude about the future and the propensity to act*. Mood is significantly influenced by style but other factors such as Performance also affect mood. In turn, mood influences style. For example, a positive market outlook will tend to trigger a positive mood and a more aggressive style, whereas a negative market outlook will tend to have the opposite effect. CASE reveals moods related to four different outlooks:

- Growth and opportunity for the market as a whole
- Growth and opportunity for the company
- Customer perception in relation to value received
- Employee perception in relation to daily interactions

Drill-down Analytics

CASE provides a powerful lens for identifying alignment strengths and weaknesses - improving confidence for where to direct improvement efforts. Each survey response reflects an opinion about the aspect in question, as reflected in a 1-10 scale where:



Average score:
 8-10 “excellent”
 6-8 “acceptable”
 4-6 “insufficient”
 1-4 “critically insufficient”

IQR*:
 3 or less: “consensus”
 4 or more: “discord”

*IQR: Inter Quartile Range, representing range for 50% responses

For example, in figure 3, survey data indicates the alignment between Operations and Vision is ‘insufficient’ for maintaining resilience. By drilling down by the Function filter, CASE illuminates’ clear sources of misalignment. Drill-down can also be filtered by Role, Location, and Tenure.

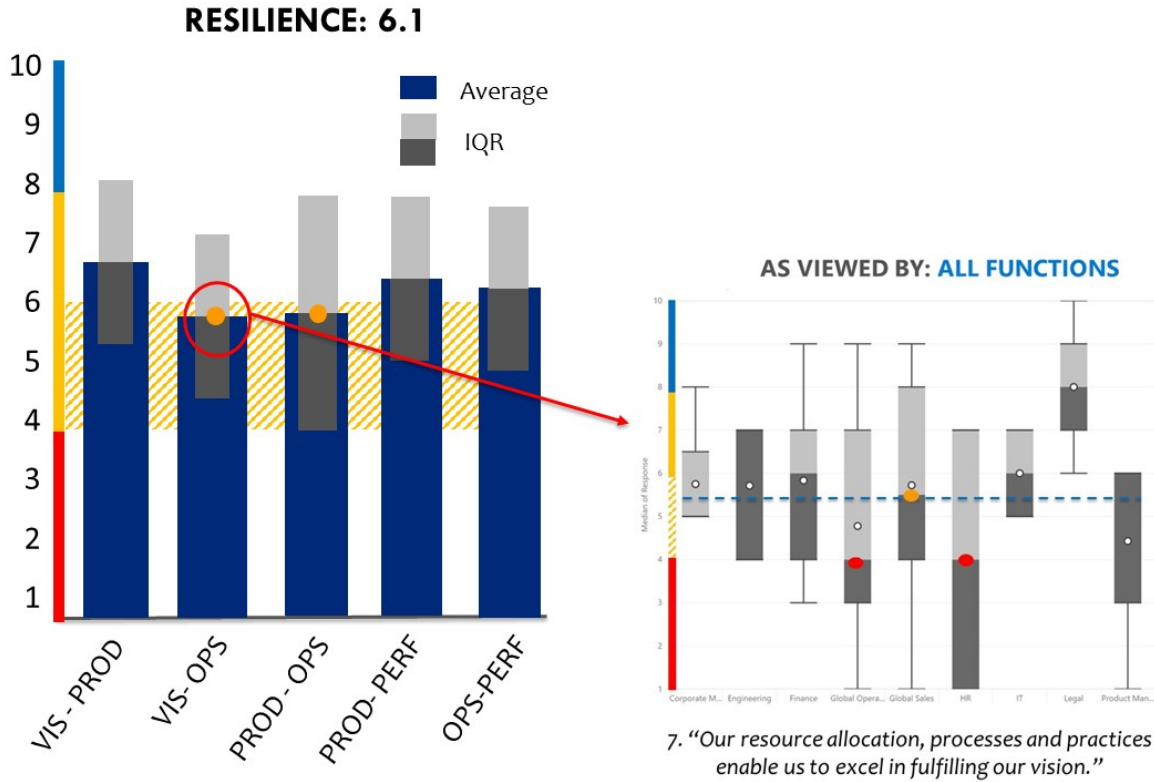


Fig 3: Drill-down analytics

To learn more about our Cultural Alignment Survey Evaluation (CASE) at work, read these compelling [CASE studies](#).

Appendix A: Sources

Ontological Design

Disclosing New Worlds, by Charles Spinosa, Fernando Flores, and Hubert L. Dreyfus, MIT, 1997

Dynamic Network Science

Linked: The New Science of Networks, by Albert-László Barabási, Perseus, 2002



Network Science, by Albert-László Barabási, CUP, 2016

The Social Atom, by Mark Buchanan, Bloomsbury, 2007

Nexus: Small Worlds and the Groundbreaking Science of Networks, by Mark Buchanan, Norton, 2002

“The Strength of Weak Ties,” by Mark Granovetter, *American Journal of Sociology* 78, No. 6 (1973): 1360-1380

Smart World: Breakthrough Creativity and the New Science of Ideas, by Richard Ogle, Harvard Business School Press, 2007

Loonshots: How to Nurture the Crazy Ideas That Win Wars, Cure Diseases, and Transform Industries, by Safi Bahcall, St. Martin’s Press, 2019

Organizational Anthropology

Corporate Culture and Performance, by John P. Kotter and James L. Heskett, The Free Press, 1992

The Social Life of Information, by John Seely Brown and Paul Duguid, Harvard Business School Press, 2000

“The Virtues of Transformational Leaders,” by Charles Spinosa, Billy Glennon, and Luis Sota, in *Business Strategy Review*, Winter 2008

“The Leader’s Guide to Corporate Culture,” by Groysberg et al., *HBR* 2/2018

Zone to Win: Organizing to Compete in an Age of Disruption, by Geoffrey Moore, Diversion Books, 2015

“Transforming Crippling Company Politics,” by Charles Spinosa, Christopher Davis, and Billy Glennon, 2019

Culture and Performance

“Corporate Culture and Performance,” John Kotter and James Heskett. This eleven-year study by Kotter and Heskett points to a strong relationship between organizational culture and performance. Their conclusions coincide with our own: *performance increases exponentially as a function of cultural alignment*. Kotter and Heskett’s work provide grounding and inspiration for the kind of measurement and analysis of organizational culture we have developed.