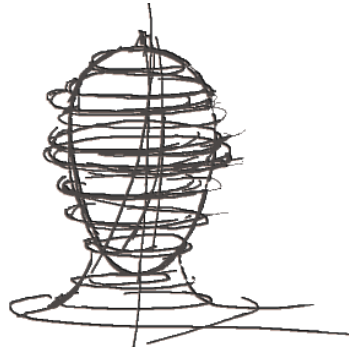




BALANCE ASSESSMENT

SUMMARY REPORT

Marketing & Advertising Agency



PERSONAL AND CONFIDENTIAL

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January 1, 2016



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Introduction

The following report is a summary of the more significant findings from the Balance Assessments completed by the management team and art department employees.

A Balance Assessment is a valuable tool to identify how employees individually or as a group feel about their overall environment and in particular their work environment. More importantly, balance assessment data when carefully interpreted can identify environmental factors, both general and specific, that negatively impact on the stress and energy levels of employees and ultimately their performance.

It is important as part of an effective Balance Assessment to determine the degree of alignment between groups of employees and those they report to in terms of their understanding and perception of the environment (work and other areas) and its impact on employees. The more sensitized *higher ups* are to issues of importance to employees, the greater the likelihood of issues being identified and remedied that affect performance. For this reason, we requested the executive group complete a comparative assessment for the management team and the art director to do the same for his employees. Regular Balance Assessments are extremely valuable as a tool to assist management in remaining sensitive to the *employee's world*.

For the purpose of this report findings were considered significant only if:

- 1) there was clear evidence of trends or patterns with the data
- 2) numerical data for particular parameters strongly suggested an area of emphasis by respondents to the survey
- 3) the data between different respondent groups varied sufficiently on a comparative basis to inform a difference of opinion or emphasis

It is important to acknowledge that in a survey of this type one should not extrapolate findings nor draw conclusions unless the data compares at a significant level numerically. To do so would likely result in opinions not supportable statistically.

As you read the findings in this report you are encouraged to refer to the charts provided which together will help you to best understand the points identified. The charts are also informative in and of themselves to provide a quick snapshot of the assessment results.

Following a review of this report with the executive group and having obtained their interpretative comments about the results we will be providing a follow up report. This report will provide prescriptive suggestions to enhance the performance of the Marketing & Advertising Agency team of professionals incorporating the viewpoints of the executive group and Optimax.



Management Balance Assessment Findings

Executive Comparison (Page 5)

- 1) Significant variance between John's and Joanna's assessment of job balance – *real and perceived* for the management team. John scored much higher than Joanna on all parameters and subsequently overall; John @84/81 - Joanna @ 56/51 (real/perceived).

Executive vs. Management Comparison – General Assessment (Page 6)

- 2) Executive (John and Joanna) and management perception of balance in areas of *Family and Self* are remarkably close.
- 3) Executive and management realistic assessment of *Job Balance* and perception of *Job Balance* are distinct. Management presents a higher opinion of balance than executives; Executive @ 70/66 - Management @ 82/80.

Executive vs. Management Comparison – Specific Attributes (Page 6)

- 4) **Management** provided **highest** rating to "*job suitability*" @ 89 and "*job passion*" @ 89. Comparatively, executive rated these same attributes at 67 and 71 respectively.
- 5) **Management** provided **lowest** rating to "*job performance*" @ 78 and "*employer recognition*" @ 76. Comparatively, executive rated these same attributes at 68 and 76 respectively.
- 6) **Executive** provided **highest** rating to "*relationship with co-workers*" @ 79 and "*relationship with supervisors*" @ 76. Comparatively, management rated these same attributes at 84 and 80 respectively.
- 7) **Executive** provided **lowest** rating to "*income satisfaction*" @ 53. (Both John and Joanna scored this lowest of all attributes). Comparatively, management rated this attribute at 80.



Art Department Balance Assessment Findings

Management vs. Department – General Assessment (Page 11)

- 1) Management's realistic assessment of *Job Balance* for the Art Department rated significantly higher than the department employees; Management @ 86 - Department @ 66.
- 2) Management's perceived assessment of *Job Balance* is comparatively close to the employee's rating but significantly lower than Management's realistic assessment of balance (above); Management @ 65 - Department @ 69.
- 3) Management and employees' perception of balance in areas of *Family* and *Job* were comparatively close. However, management rated self balance significantly higher than employees; Management @ 100 - Employees @ 66.

Management vs. Department – Specific Attributes (Page 11)

- 4) **Employees** provided **highest** rating to "*job responsibility understanding*" @ 87, "*job suitability*" @ 76 and "*relationship with co-workers*" @ 76. Comparatively, management rated these attributes at 74, 87 and 96 respectively.
- 5) **Employees** provided **lowest** rating to "*income satisfaction*" @ 46, "*employer's recognition*" @ 55 and "*job performance*" @ 57. Comparatively, management rated these attributes at 77, 87 and 86 respectively.
- 6) **Management** provided the **highest** rating to "*job passion*" @ 97, "*relationship with co-workers*" @ 96 and "*relationship with supervisors*" @ 95. Comparatively, employees rated these attribute at 65, 76 and 68 relatively.
- 7) **Management** provided the **lowest** rating to "*job enjoyment*" @ 71, "*job responsibility understanding*" @ 74 and "*job income*" @ 77. Comparatively, employees rated these attributes at 62, 87 and 46 respectively.

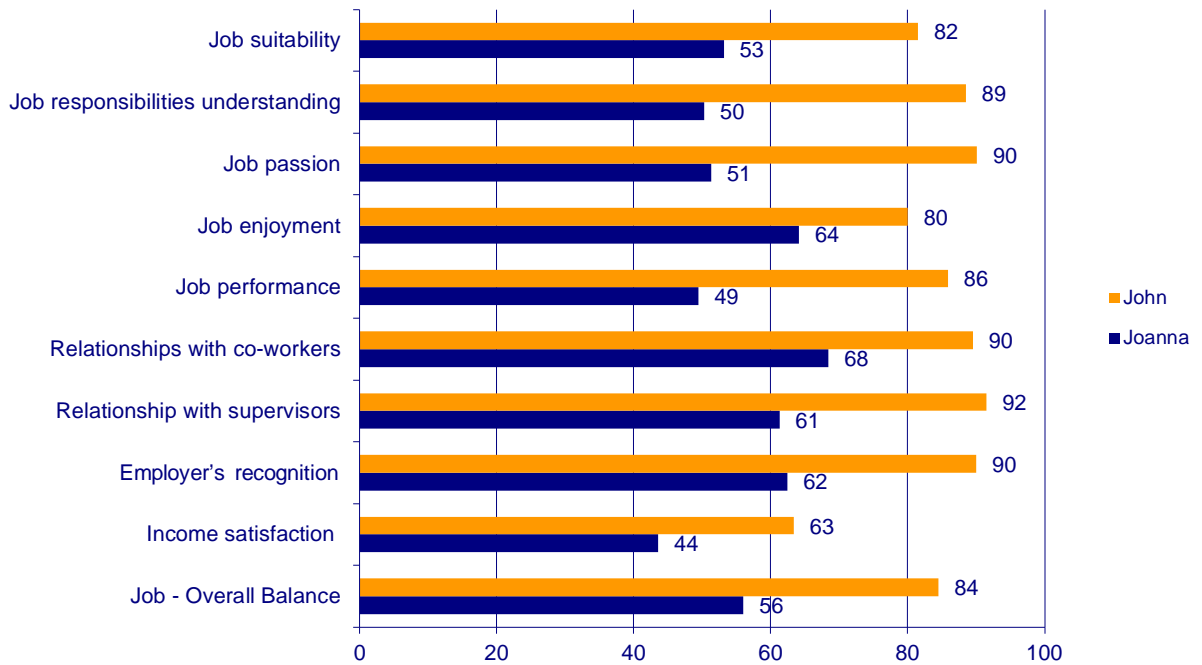


Management Team Composite

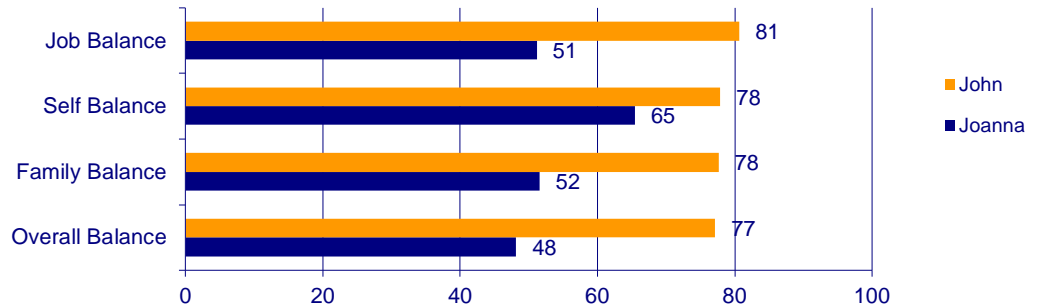
Evaluator: **Executive (John & Joanna)**

Date: **January 1, 2015**

Job Balance



Overall Balance Perception

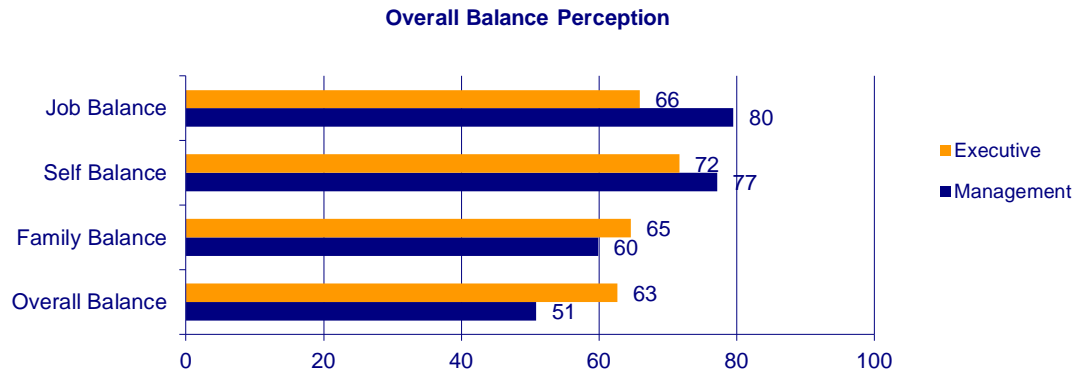
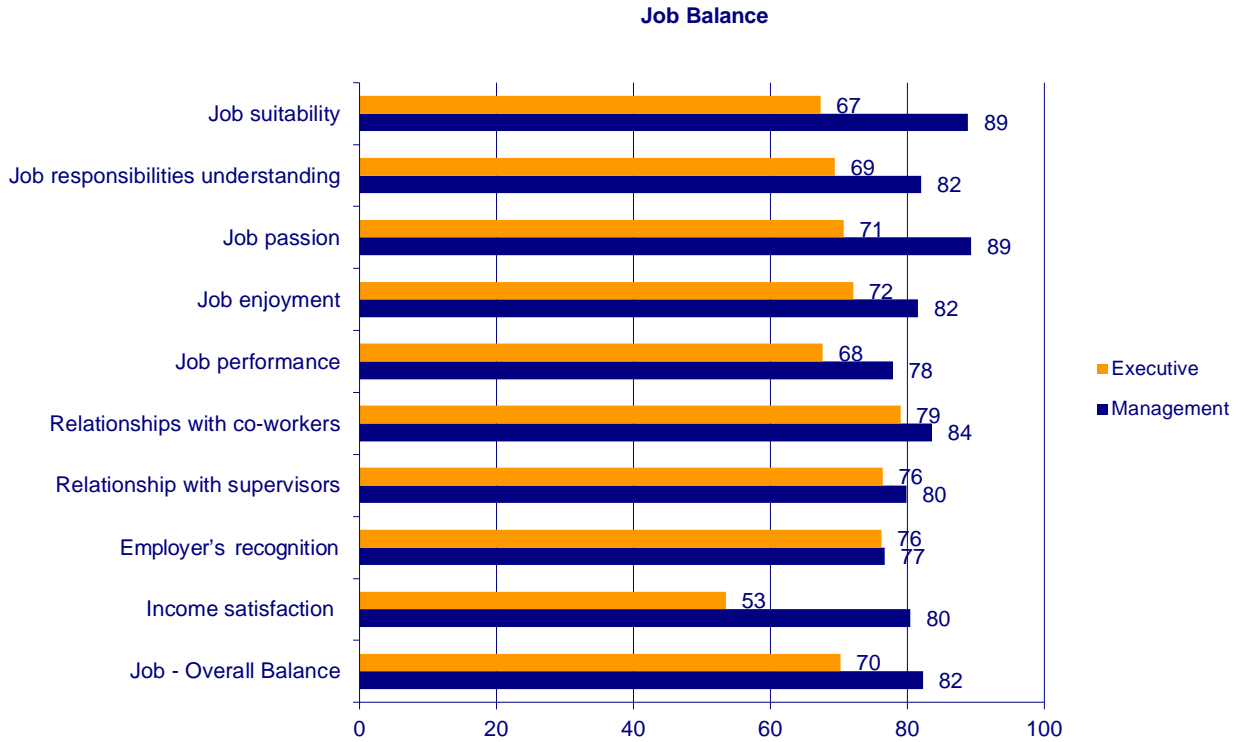




Management Team Composite

Evaluator: **Executive & Management**

Date: **January 1, 2015**



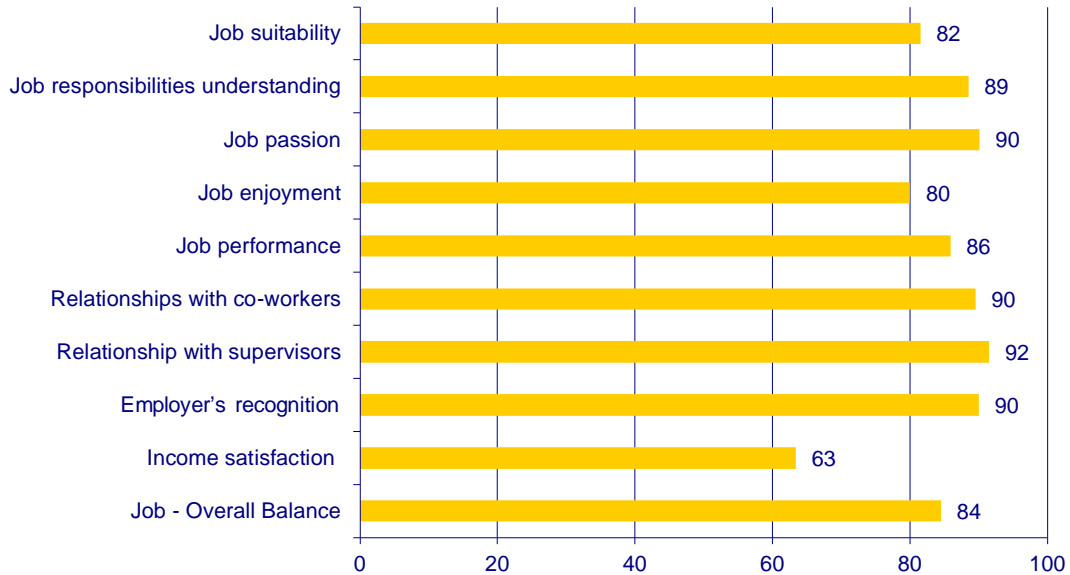


Management Team Composite

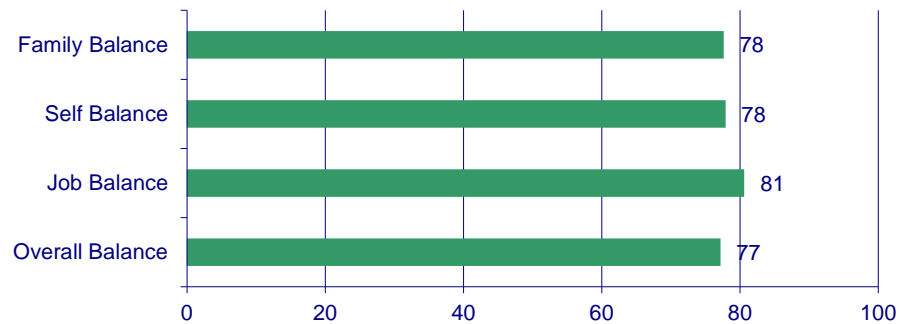
Evaluator: **John Optimax**

Date: **January 1, 2015**

Job Balance



Overall Balance



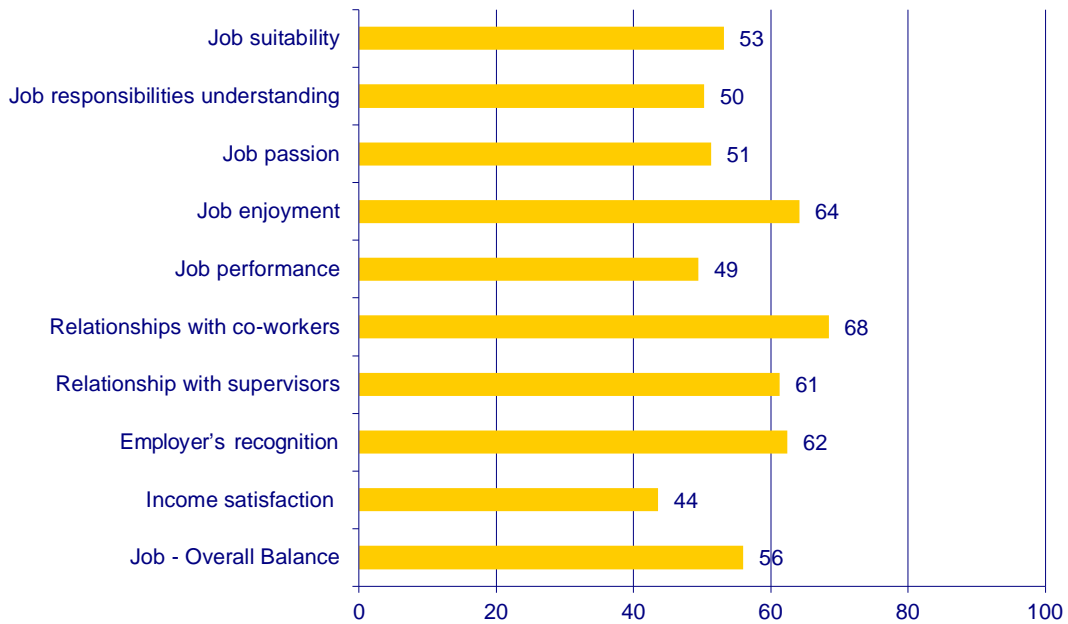


Management Team Composite

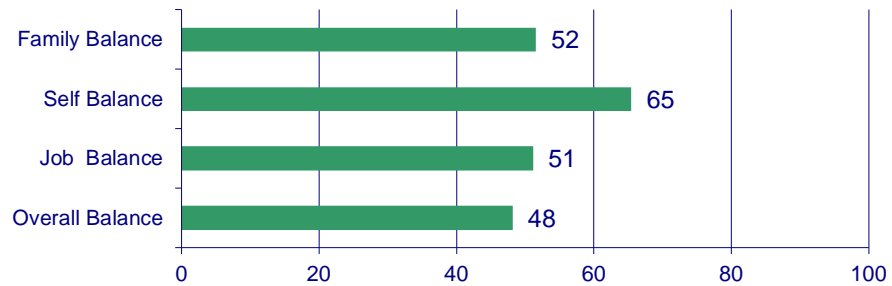
Evaluator: **Joanna Optimax**

Date: **January 1, 2015**

Job Balance



Overall Balance Perception





Management Team Composite

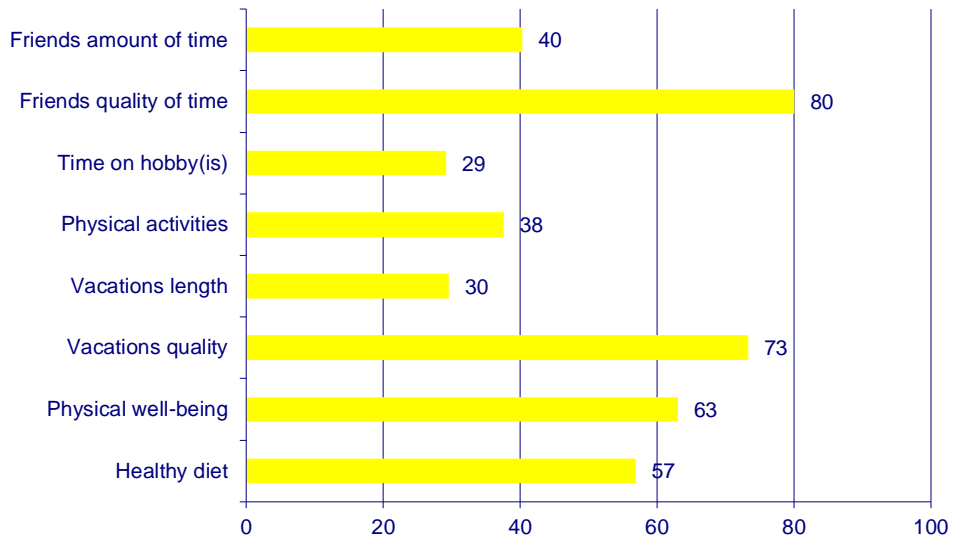
Evaluator: **Management Team**

Date: **January 1, 2015**

Family Balance



Self Balance



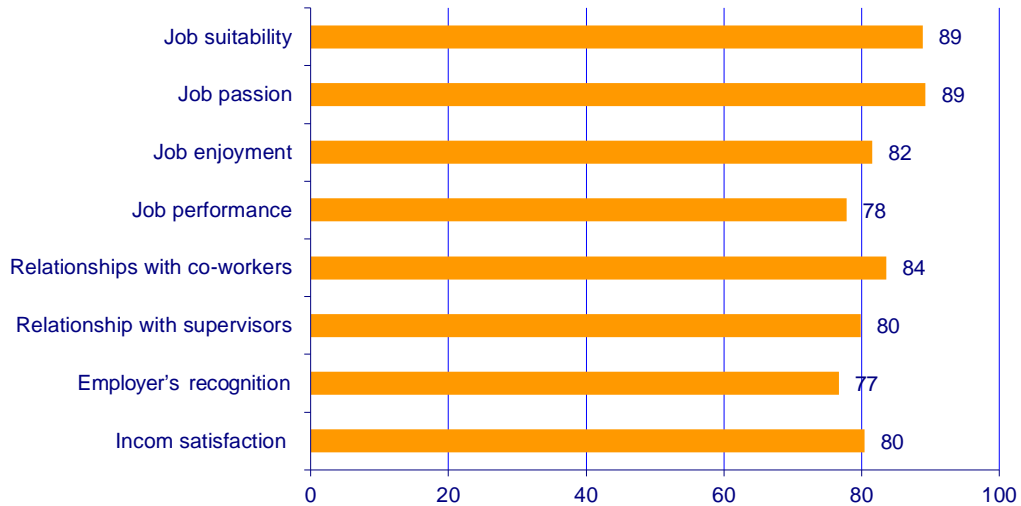


Management Team Composite

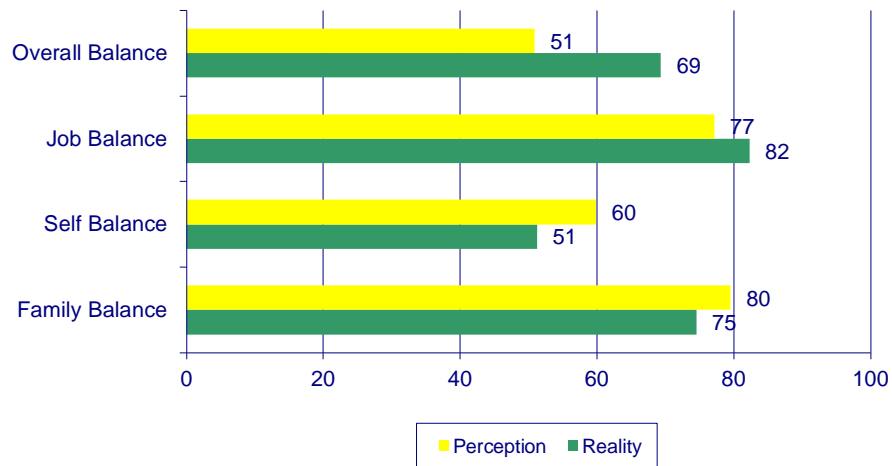
Evaluator: **Management Team**

Date: **January 1, 2015**

Job Balance



Overall Balance



Reality is a summary of the individual results in each balance category	Perception is overall understanding of balance for each balance category
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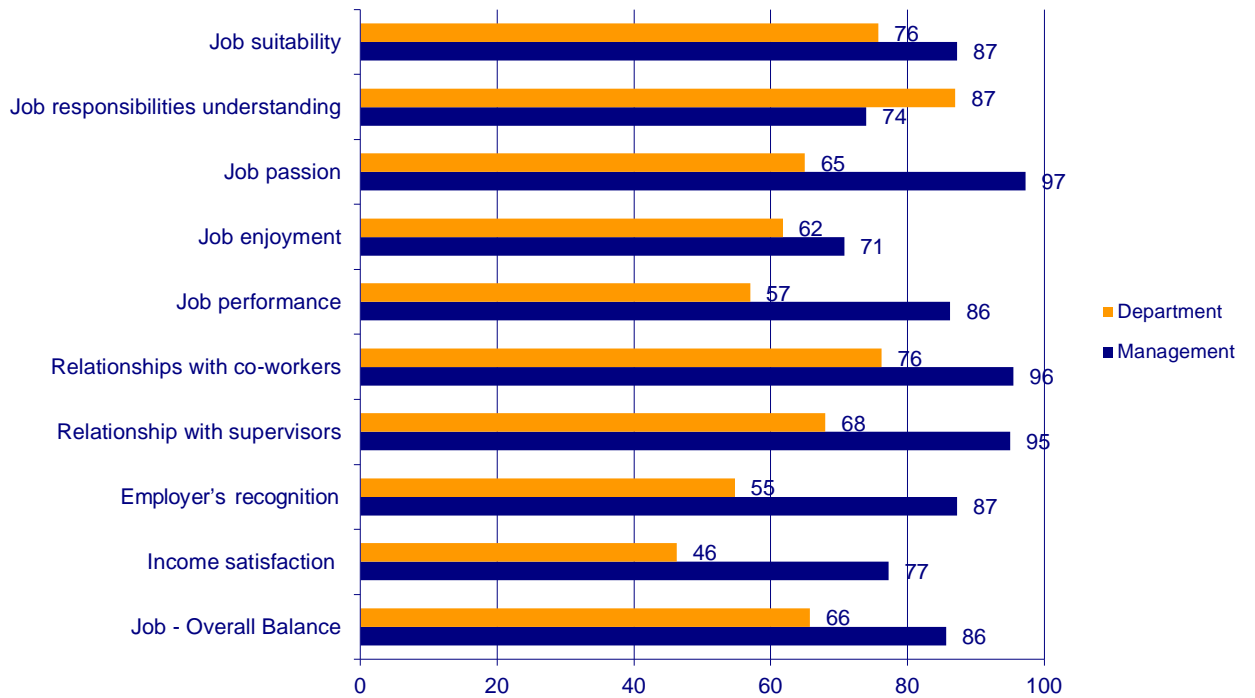


Art Department Composite

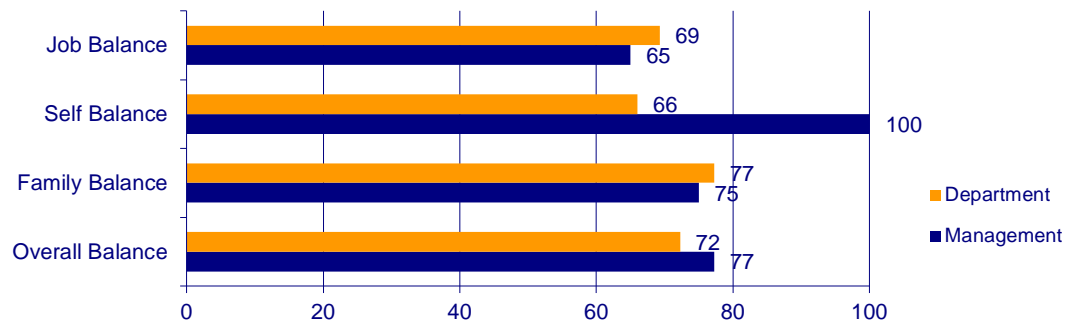
Evaluator: Management & Art Department

Date: January 1, 2015

Job Balance



Overall Balance Perception



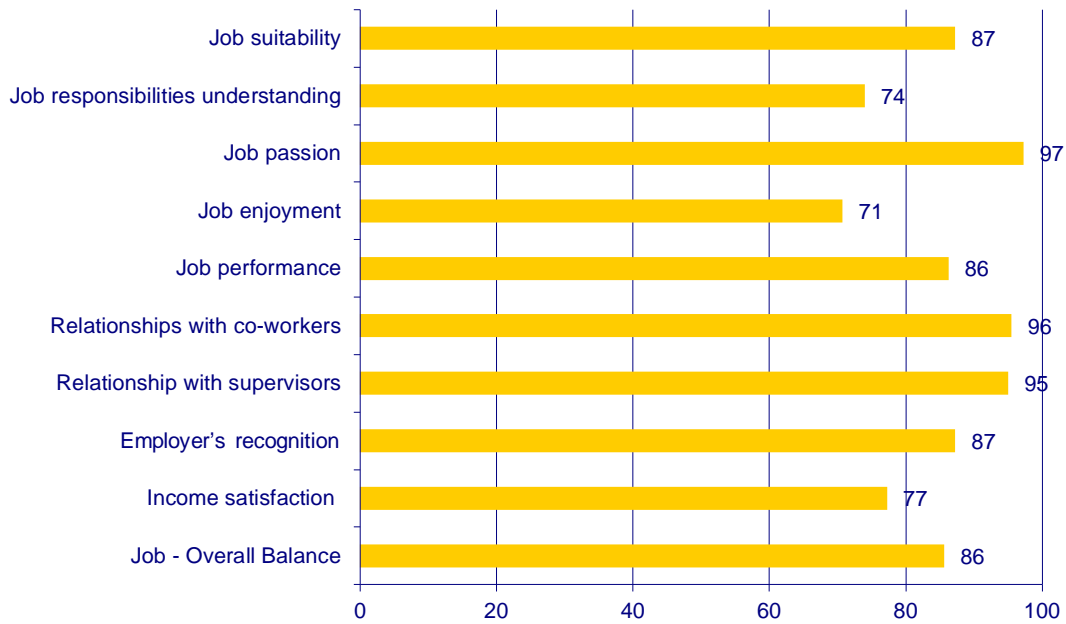


Art Department Composite

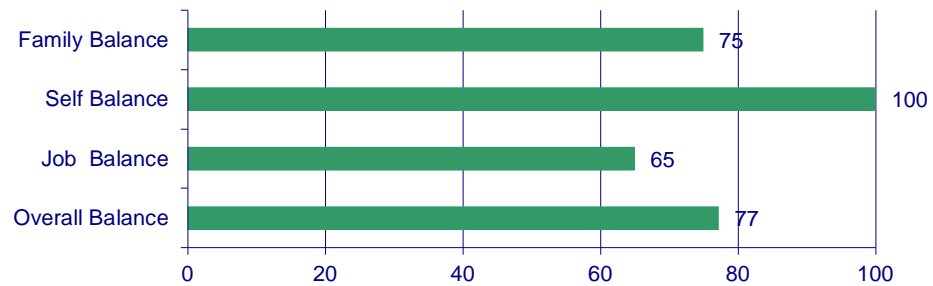
Evaluator: **Peter Optimax**

Date: **January 1, 2015**

Job Balance



Overall Balance Perception



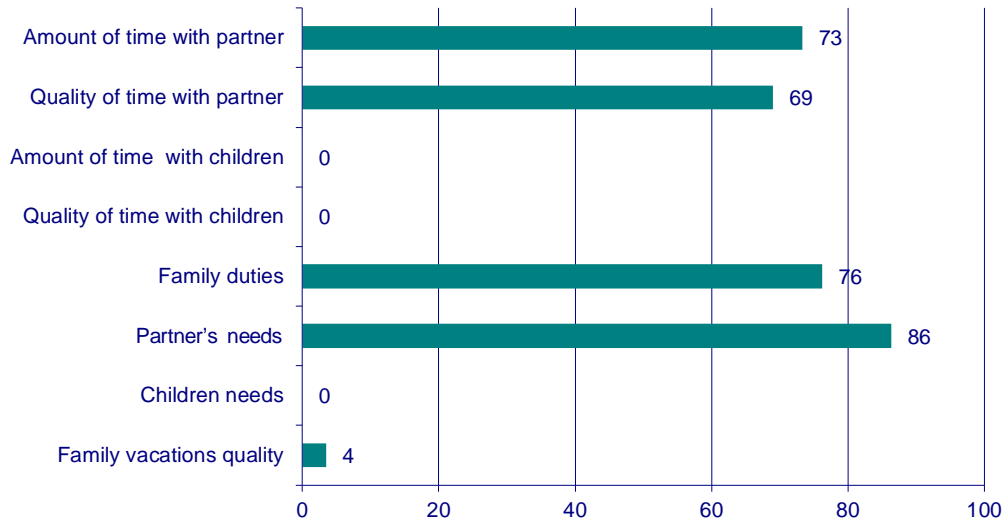


Art Department Composite

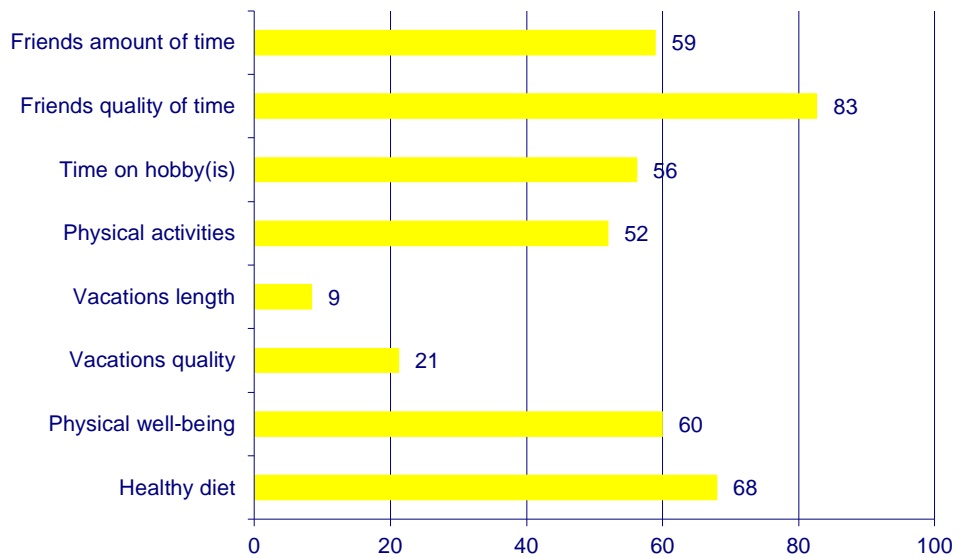
Evaluator: **Art Department**

Date: **January 1, 2015**

Family Balance



Self Balance

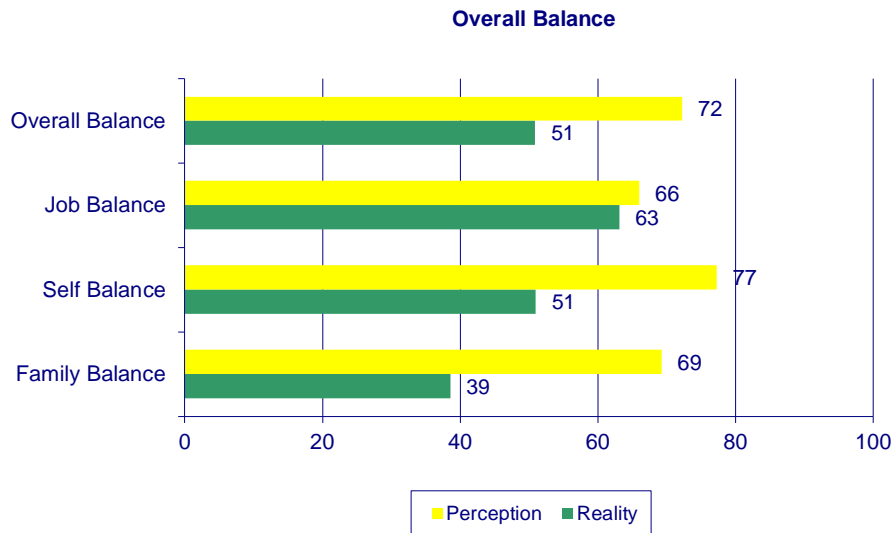
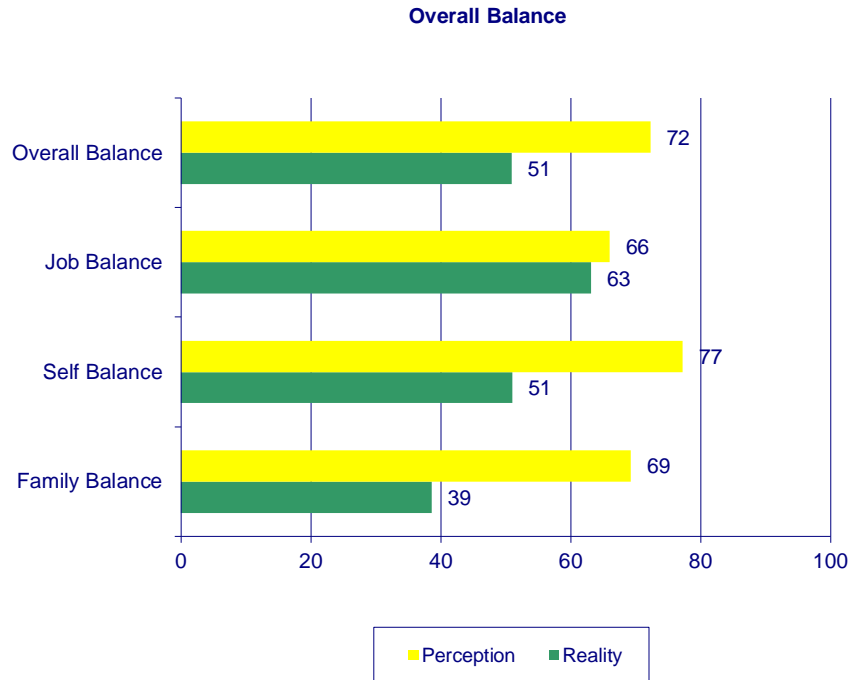




Art Department Composite

Evaluator: Art Department

Date: January 1, 2015



Reality is a summary of the individual results in each balance category	Perception is overall understanding of balance for each balance category
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Management Team Performance Recommendations

Executive Comparison

The significant variance between John and Joanna's assessment of job balance for the management team suggests the following:

- 1) Strategic decisions, particularly those related to human resource issues, should be jointly assessed and discussed by John and Joanna before any decisions are finalized. This is to ensure that final decisions benefit from the potential diversity of view on issues. A diversity of opinion is a strength in decision making in that decisions are likely to consider more factors and mitigate any individual biases or presuppositions.
- 2) John and Joanna should meet regularly to discuss their thoughts and opinions on the different areas assessed in this report. This process will help John and Joanna to stay better aligned on issues in consideration of their unique perspectives. A more proactive response to issues could be a positive result of this process since what may not be viewed as a concern to one could be for the other.

Executive vs. Management Comparison

- 3) The Executive team appears to have a good sensitivity to external factors (Family/Self) impacting their employees. The Executive team believes this is a result of the different family events held by the company (formal and informal) that help build a caring work environment. A continued commitment to these programs will help maintain this level of alignment between the views of the Executive and Management team.
- 4) The variance between the Executive and Management team in the Job Balance assessment can be improved through step 2 above. As well, open forum meetings with the Management team where job balance issues are tabled could be beneficial in informing the Executive team of Management's view on these issues.
- 5) Management provided the lowest comparative rating to the balance attributes: "job performance" and "employer recognition". The specific reasons for these ratings is difficult to comment on as the Management team did not provide additional comments on the Balance Assessment. *It is suggested that Optimax meet with the Management team, as a group, to present the results of the assessment and to seek out clarification on these issues.*



Art Department Performance Recommendations

Management vs. Department Employees Comparison

- 1) Department Management opinion on most Job Balance attributes is not aligned with the employees. Management rates job balance much higher than the employees. It is recommended that the results of this assessment be shared with the department manager to bring an awareness of these differences. The manager's character assessment indicates low scores in people handling and leadership competencies. His effectiveness in these competencies can be appended through the sharing of this information and continued close coaching in these areas. The absence of close supervision could result in a breakdown in communication between the employees and the manager leading to a decline in employee satisfaction and performance.
- 2) Department Management appears to have a good sense of the external factors (Family/Self) impacting employees. As mentioned above, the Executive team believes this is a result of the different family events held by the company (formal and informal) that help build a caring work environment. A continued commitment to these programs will help maintain this level of alignment.
- 3) Employees provided the lowest comparative rating to the balance attributes: "job performance" and "employer recognition" and "job satisfaction" The specific reasons for these ratings is difficult to comment on based on the limited additional comments on the Balance Assessment. *It is suggested that the Executive team or Optimax meet with the Employee team, as a group, to present the results of the assessment and to seek out clarification on these issues.*