*VISION*Shop Banking
Talking Points

The *VISION*Shop Overview

*VISION*Shop is a detailed set of assessment tools that evaluates organizations and their employees to enhance business growth opportunities. *VISION*Shop provides 20 of a bank's commercial customers and/or prospects with:

- **Insights** into the company's *Organizational Strategy, Design and Culture* using a Company Report Card
- A **comparison** of company results to more than 4,800 other organizations who have taken the same assessment
- A **detailed profile** of **leaders** using **DISC** and **MOTIVATORS** assessment tools
- *On site results delivery* and sharing session in a half day seminar with representatives of all participating companies delivered by a strategic business consultant

What the Bank Receives For Their Investment

The bank benefits in two ways, first they get to go through the same process within their division as the participating commercial companies – *e*Nterprise*EKG*, the **DISC** and the **MOTIVATORS** assessments. Secondly, and importantly, the bank leaders get to review the insights from assessments of their corporate guests, consult with the leaders and are informed as to how the bank's products will be able to assist with building the businesses better.

Specifically, the bank leaders will:

- Gain detailed business insights into their current/prospective clients
- Be able to link banking products to defined company needs (i.e. offer an equipment loan if a key component of below average technical equipment is identified.)
- Leverage the *VISION*Shop experience into more consultative opportunities within the organization:
  - Quarterly Review Sessions (Sharing current economic trends and insights into their industry)
  - Ideation Sessions (Next big thing funding, efficiency planning and path definition)
  - Share new/current banking products that could help the organizations accomplish their goals more quickly
- Enhance the Bank to Customer relationship (Objective would be for the client to become reliant upon the bank in the growth decisioning process.)
- Drive individual banking relationships from positive business banking relationships

What the Customers/Prospects Receive

The big big big idea is that with *VISION*Shop, an organization will receive *the most eye-opening evaluation of their organization since they started their company*. *VISION*Shop is made up of three various components, the *e*Nterprise*EKG*, the **DISC** assessment, and the **MOTIVATORS** assessment.

The Organizational Assessment: *e*Nterprise*EKG*

The *e*Nterprise*EKG* assessment uses an Organizational Dynamic Model to measure, in detail, the employees and the managers assessments in three specific areas Strategy, Design, and Culture. Much like an Individual 360, which measures an individual, the *e*Nterprise*EKG* is a 360 that measures the organization. Within the Organizational Dynamic Model, there are:

- 3 Organizational Core Drivers
- 12 Key Components
- 35 Principle Elements

3 Core Drivers

12 Key Components

35 Principal Elements

1.0 Organization Strategy		2.0 Organization Design		3.0 Organization Culture	
1.1 Mission, Vision Competitive Advantage	• Mission • Vision • Strategic Advantage	2.1 Structure	• Structure Alignment	3.1 Values & Beliefs	• Values Credibility
1.2 External Assessment	• Customer Profile • Market & Competitive Analysis	2.2 Core Competence	• Leveraging Core Competence	3.2 Leadership	• Management Modeling • Empowerment • Coaching • Building Teams
1.3 Internal Capabilities	• Finance • Research & Development • Production • Marketing • Sales Effectiveness • Customer Service	2.3 Information Systems, and Technology	• Organization Communication • Shared Knowledge • Required Technology	3.3 Human Resource Systems	• Recruitment • Orientation • Training & Development • Performance Management. • Reward Systems
1.4 Planning & Execution	• Planning • Resource Alignment • Execution	2.4 Organization Efficiency	• Policies & Procedures • Roles & Responsibilities • Outsourcing & Partners	3.4 Organization Character	• Informal Communication • Employee Feedback • Ability to Change

The *eNterpriseEKG* delivers information in five formats – **A Report Card, Quadrant Analysis, Comparison (Spider) Chart, Statement Detail and Comments** – sections. To see an output example, <u>CLICK HERE</u>.

Report Card	This section provides the organization's overall Strategic Performance Index (SPI), compares this SPI to other organizations in our normative database, and lists the organization's Capabilities and Constraints (High Ranked Disciplines within Strategy, Design, and Culture) with their relative scores.
Quadrant Analysis	Displays the elements for each Core Driver. Elements are shown in a quadrant format that plots both the performance of the element and the degree of impact (ranked priority) it is perceived to have on the organization.
Comparison Chart	A comparison of outcomes with other organizations in the normative database. Comparisons are made to organizations who achieve scores in upper and lower 10% in the database, and to the overall normative mean.
Statement Detail	Provides mean scores and the percentage of "Agree", "Disagree" and "Don't Know/Not Applicable" responses for each statement. This section indicates distribution for responses (centrality or polarity) to each statement.
Comments	Provides the anecdotal comments from respondents. This is an open text field. Comments are separated by white or gray background arrangement.

Associate Insight – DISC and MOTIVATORS Assessments of Leaders

DISC Assessment

DISC gives you tools to help you become a better you, a better teammate and, as a result, build a better business.

All leaders within the organization will be asked to complete a **DISC** assessment. The **DISC** assessment is a needs-motivated, observable behavioral profiling system, which measures the energy you put into Dominating problems, Influencing people, Steadying the environment and Complying to rules and details.

**DISC** is a behavioral profiling system and is divided into four quadrants:

1. **D** for dominance,
2. **I** for influence,
3. **S** for steadiness, and
4. **C** for conscientiousness.
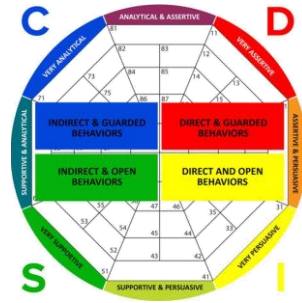
By using the **DISC** model, it is easy to identify and understand your own style, recognize, and cognitively adapt to different styles and develop a process to communicate more effectively with others. CLICK HERE to see a sample output report.

MOTIVATORS Assessment

Additionally, all leaders within each organization will be asked to complete a **MOTIVATORS** assessment. While **DISC** describes **HOW** someone will behave, **MOTIVATORS** reveals **WHY**. Being able to measure and understand both the **HOW** and **WHY** of human behavior is vital to build top performing teams.
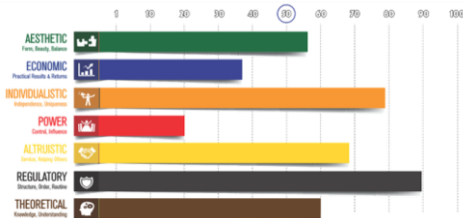
Within the assessment seven dimensions of motivation are measured within the report. They include Aesthetic, Economic, Individualistic, Power, Altruistic, Regulatory, and Theoretical. Within the assessment a motivation index is calculated which is unique to the marketplace, in that, it examines all seven of the independent and unique aspects of motivation. Each responder receives a profile that truly helps them understand their unique motivations and drivers.

Additionally, many suggestions are provided in each of the seven **MOTIVATORS** sections of the report. CLICK HERE to see a sample output report.

How Do Organizations Use *VISION*Shop?

✓ To establish baseline performance as part of the Strategic Planning Process (a comprehensive companion to a SWOT analysis).
✓ To determine alignment or misalignment among senior managers regarding overall performance and priorities.
✓ To compare Executive Management, Middle Management, and Staff perspectives.
✓ To assess the current degree of employee engagement and organizational readiness to execute a Strategic Plan.
✓ To help new leaders quickly evaluate the performance and "personality" of his/her organization.
✓ To evaluate the similarities and differences of cultures of organizations brought together buy a merger or acquisition.