

**ExpertSelect**

**ExpertDiagnostic<sup>©</sup>**

**Your contact:**

**Michael BERTRAND**

**+32-(0)10-849550**

**[michael.bertrand@expertselect.org](mailto:michael.bertrand@expertselect.org)**

BELGIUM – THE NETHERLANDS – FRANCE

## A brief description

Who takes the decision to undertake an **ExpertDiagnostic<sup>®</sup>** project?

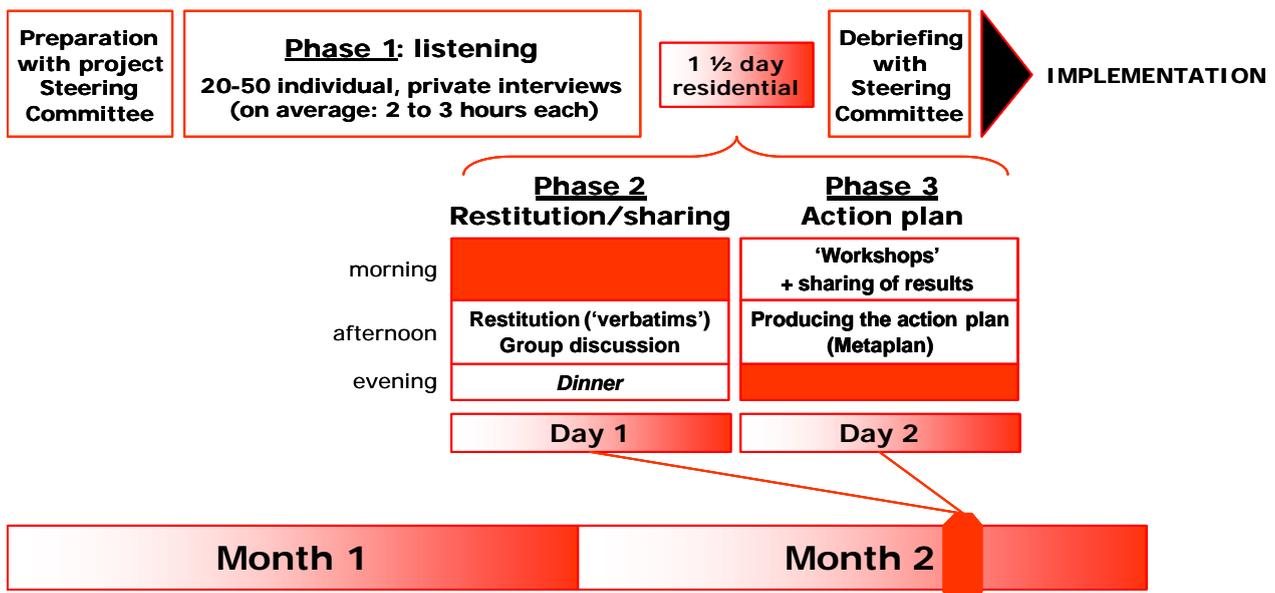
- The shareholder or his representative.
- The managing director of a company.
- An operations manager heading a Business Unit.
- A manager responsible for a functional line of resources.
- Any manager leading an important internal change project.

Why use **ExpertDiagnostic<sup>®</sup>**?

- To clarify complex issues and lead the way for future action.
- To mobilize pro-active contributions by company resources in a controlled way.
- To unravel situations of conflict or quasi-conflict through the involvement of a third party.
- To define the fundamentals of an action plan that will be supported by a broad consensus.

Detailed organization of an **ExpertDiagnostic<sup>®</sup>** assignment

- A 3-phased approach preceded by a careful preparation and concluded by an intense debriefing session with top management for deciding on an implementation plan:



# ExpertSelect

- **Preparation:**

*Objective is to understand and define clearly with management its intentions and expectations from the exercise; scope, timing, the Project Steering Group members and participants to the project are identified. An approach for communicating the exercise and its objectives to the organization is also agreed.*

- **Phase 1:** we essentially listen to the organization

*ExpertSelect will conduct a series of private interviews with a representative selection of the company's resources. Participants are of course guaranteed that all opinions expressed remain strictly anonymous. On average, each individual session lasts no longer than 2 to 3 hours. Material collected is always extremely rich. Approach followed is semi-directive, based on active listening around a list of issues forming part of a pre-agreed interview guide.*

- **Phase 2:** we will feed-back the results from phase 1 to the entire group of participants

*To do this, we use the « verbatim technique», i.e. issues, concerns, proposals, criticism we heard expressed in a consistent way during the interviews will be reformulated in short incisive "motto" sentences people easily remember. These sentences will concentrate the essence of opinions from the whole group about issues included in the scope of the project. We will present them under broad headings representing actionable themes, such as, for example: overall strategic vision, competitive threats, organization structure, client segmentation, product/service portfolio, distribution channels, customer service requirements, middle- and back-office support, ICT strategy, branding and communication, HR strategy, training, quality, etc.*

*The objective is to mirror to the whole group (including management) how participants really view current performance of the organization and what could/should be done to improve it. The mirroring effect will bring to the surface criticism people share but do not necessarily voice, hidden/conflicting agendas, points of resistance, but also the key areas perceived as main strengths of the organization and where a broad consensus exists. By openly sharing such a diagnostic, the objective is to set a fresh base for moving forward.*

*As part of phase 2, ExpertSelect will encourage comments by individual participants about the diagnostic. A group discussion moderated by ExpertSelect will also take place at this stage. To conclude phase 2, main areas of agreement/disagreement on current status and on the main emerging courses of action will be tentatively summarized.*

- **Phase 3:** we will involve the whole group in building together the fundamentals of an action plan for the future:

*The whole group will split into smaller workshop groups. Each workshop will focus on one key course of action identified in the conclusion of phase 2, with the objective to produce pragmatic/workable recommendations for improvement. In order to share results, a spokesman designated by each workshop will present to the entire group the findings and proposals recommended by his own group, and a Q/A will be organized at the end of each workshop presentation.*

*In the last step of phase 3, ExpertSelect will help the group consolidate all suggestions into a prioritized overall action plan. To reach this objective, ExpertSelect uses a Metaplan-derived technique to eliminate non essentials/nice-to-have, focus on core recommendations and assign priorities, using a voting technique for ranking the recommendations. Phase 3 ends with producing a tangible deliverable constituted by a prioritized list of recommended improvement actions the group as a whole has subscribed to.*

# ExpertSelect

- One to two **debriefing sessions** are then organized with the Project's Steering Committee to decide how the list of recommendations will be exploited in an implementation phase.

- In practical terms:

**Phase 1 rarely exceeds 2 to 3 weeks:** in general, 20 to 50 interviews, handled by 1 to 2 consultants, are amply sufficient to form a meaningful sample. Participants will need to be representative of the organization viewed both horizontally (to ensure cross-functionality), and vertically (to ensure input at all levels of its hierarchy).

**Phases 2 and 3 are concentrated in 3 half-days**, usually organized over a two-day period in an off-site residential location. Phase 2 (restitution and sharing of the diagnostic) absorbs the afternoon of the first day. Evening is spent together: people digest what they have heard, take distance and have the opportunity to meet in a friendly atmosphere over dinner. Phase 3 workshops take place the following morning. Part of the morning and beginning of the afternoon are spent sharing workshop results with the whole group. The Metaplan session, producing the final deliverable of the assignment, i.e. a prioritized list of actions subscribed to by the whole group concludes the afternoon's session.

## Key benefits delivered by ExpertDiagnostic<sup>®</sup>

- **Phase 1:** Awareness is created throughout the organization that each one's opinion counts. This always generates a very positive momentum, unlocking substantial energy frozen because of frustrations that accumulate over time in all organizations. Although a profound aspiration of all individuals in any organization, time devoted to listening is indeed usually too scarce. Clearly, an outsider is in the best position to professionally organize a listening phase in an ethical and effective manner, ensuring in addition non-biased results.
- **Phase 2:** Enabling an open expression of perceptions by a representative group and stimulating a view-sharing approach to an overall diagnostic establishes a solid basis for a fruitful and liberated confrontation of ideas. This is essential for switching minds and energies from a diagnostic/backwards mode to a forward-looking constructive approach. The exercise is always very revealing for everyone involved, including members of the management team.
- **Phase 3:** Methodology applied ensures that material collected in the diagnostic phase is exploited in an efficient manner. The entire group of participants is put to contribution to provide answers and solutions to problems identified. The methodology ultimately delivers a tangible product in the form of a prioritized list of improvement actions, backed up and supported by the whole organization.
- **All phases:** The methodology allows to concentrate a thorough participative and communication exercise in a very short period of time (usually less than 2 months), and within reasonable budget limits. It also preserves throughout a neutral position by the top management team, while still ensuring they control the whole process and remain at all stages in the "driver's seat".

# ExpertSelect

## Costs of conducting an ExpertDiagnostic<sup>®</sup> project

- **ExpertSelect's level of effort will normally vary between 20 and 40 man-days, depending on the size of the organization and the number of consultants assigned to the project:**

	Off-site preparation	On-site presence	Total effort
Preparation with the Steering Committee	(**) 0.5 to 1	(*) 1 to 2	1.5 to 3
Kick-off and communication	(**) 1 to 2	(*) 0.5 to 1	1.5 to 3
Phase 1: Listening	(**) 1 to 2	(*) 7,5 to 16	8.5 to 18
Phase 2: Restitution/Sharing	(**) 2.5 to 5	(**) 1 to 2	3.5 to 7
Phase 3: Action plan	(**) 0.5 to 1	(**) 1 to 2	1.5 to 3
Debriefing with Steering Committee	(**) 0.5 to 1	(**) 1 to 2	1.5 to 3
Supervision / client contacts	1	1 to 2	2 to 3
<b>Total</b>	<b>7 to 13</b>	<b>13 to 27</b>	<b>20 to 40</b>

(\*) in function of the size of the organization and of the number of interviews conducted (between 20 and 50)

(\*\*) in function of the number of consultants assigned by ExpertSelect to the project (usually 1 or 2)

- *For this type of project, billing rates of our consultants vary between 1,400 and 1,600€/day. Hence, depending on the scope of the project, **the fee budget will typically range from 30,000 to 60,000€**. Taxes and expenses are not included in this fee quotation.*
- Conclusion:  
*Experience and seniority of our consultants as well as a rigorous methodology ensure a highly strategic exercise is maintained within a very acceptable cost range and time limits. The methodology has proven its efficiency over and over again. It produces pragmatic results quickly while limiting the draw on each participant's precious time and energy.*