SOARS - STRATEGIC ORGANIZATIONAL ASSESSMENT REVIEW SURVEY

ANNouncing A UNIQUE LEARNING OPPORTUNITY FOR ORGANIZATIONS

SOARS OVERVIEW

In the highly competitive global landscape, executives are challenged to simultaneously identify new opportunities for growth, become more agile and responsive, all while leading their organizations with regard to a myriad of business challenges.

Building on the findings of our recently completed survey of senior and mid-level managers across many organizations and industries, Jeana Wirtenberg & Associates, LLC and Quantisoft, LLC are conducting a Strategic Organizational Assessment Review Survey (SOARS) for companies that are focusing on accelerating and sustaining growth and profit in the highly competitive global marketplace.

This high-payback survey will enable participating companies to gather important strategic actionable information and insight from their senior and mid-level managers, identifying organizational effectiveness opportunities that will contribute to accelerating profit and growth targets, and that can differentiate successful organizations from all the rest. SOARS participants will also be able to compare themselves with benchmarking data from other organizations.

SOARS is not an employee opinion/satisfaction/engagement survey. SOARS is a strategic assessment that will enable your organization to quantify the importance of over 50 critical organizational business drivers and evaluate how well your organization is performing in each of these critical success areas. The organizational business driver categories include:

- Strategy
- Leadership
- Culture
- Innovation
- Structures, Systems & Processes
- Skills & Competencies
- Performance Measures & Reward Systems
- Environmental, Sustainability and Responsibility

You will be able to compare your organization’s SOARS’s results with those of other participating companies.

KEY BENEFITS FOR COMPANIES PARTICIPATING IN SOARS

- Identify breakthrough performance improvement and bottom-line opportunities where line management, supported by Human Resources (HR), Organization Development (OD) and other resources need to focus.
- Assess the health of your organization and identify performance gaps for over 50 of the most critical organizational business drivers.
- Create a roadmap for making breakthrough improvements in organizational effectiveness.
- Enable HR and OD to make more effective contributions to their organizations by focusing their energies on those areas with the highest priority and the largest performance gaps.
- Receive comparative benchmarking data from other companies participating in SOARS.
- Attend a one-day SOARS Best Practices Conference where you will receive an overview of SOARS survey findings and share organizational best practices with other SOARS participating companies.
SOARS FOCUS

Some of the key business challenges that SOARS will focus on include:

**Attracting, retaining and engaging the commitment of high-performing people**
- Strengthening your “employer of choice” reputation
- Clarifying your company’s stand as reflected in its brand, offering and employment relationship
- Targeting your high-impact development to maximize your return-on-investment
- Developing productive, performance-based work environments
- Developing and maintaining the commitment of your workforce to the goals of the organization for better overall performance results
- Clarifying your purpose and mission to inspire and engage the workforce

**Strengthening your human capital performance, growth and innovation through alignment and execution**
- Building your leadership capacity for now and the future
- Aligning and executing your strategies in a way that meets your financial goals and are consistent with your core values
- Aligning strategies, people, systems and processes organization-wide to enhance your productivity and profitability
- Facilitating innovation and smart risk-taking in your company
- Leveraging and integrating new technologies to support your business
- Increasing your flexibility in managing capacity utilization to meet changing market conditions

**Increasing your Sustainability and Organizational Effectiveness through systemic and collaborative approaches**
- Strengthening your culture of collaboration, resiliency, and adaptation to change
- Supporting organizational globalization and multiculturalism in your company
- Solving your organizational problems systemically as opposed to solving them on a piecemeal basis
- Adapting to new and ever-changing forms of regulation in your industry
- Meeting your stakeholders’ increasing expectations for socially responsible and sustainable business practices
- Effectively applying organizational change principles to your business and product life cycles
- Effectively addressing your organizational culture during organizational realignments, industry consolidations and mergers and acquisitions
Survey Approach & Process

The Survey will be conducted using the following process:

1. For comparison purposes, the survey questions will be standardized for use by all organizations participating in the survey.

2. The survey provides opportunities for open-ended comments on every question. These results will be synthesized in a thematic qualitative analysis, to be included in the Executive Summary report described below in number 9.

3. Demographic questions will be used to identify respondents’ functional department, level within the organization, etc. Individual respondents’ results are strictly confidential and will not be shared with anyone.

4. SOARS is being conducted as an Internet survey. Each participating organization will be given a unique survey URL that they will e-mail to their senior and mid-level managers participating in the survey. Participating organizations will be provided with suggested text for the survey announcement e-mails.

5. The survey response period will be three weeks. Participating organizations will send follow-up reminder e-mails during the second and third weeks.

6. Survey reports will be sent to participating organizations within ten business days of closing of the survey response period.

7. Participating organizations will receive their organization’s comprehensive survey results reports electronically.

8. Participating organizations will also receive blinded (names of organizations not disclosed) benchmark comparison data from other participating organizations.

9. Participating organizations will receive an Executive Summary Report which will be presented to the organization’s designated management team at the organization’s office. The SOARS Executive Summary Report will be sent to participating organizations one month after the survey response period is closed out.

10. Members can have three company representatives participate in a one-day SOARS Best Practices Conference to be held first quarter 2007 (exact date to be determined).

Survey Timing

<table>
<thead>
<tr>
<th>Key SOARS Events</th>
<th>Dates</th>
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<tbody>
<tr>
<td>1. Companies sign up to participate in SOARS</td>
<td>May → September 2006</td>
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<td>2. Conduct SOARS surveys</td>
<td>September → October 2006</td>
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<td>3. Receive SOARS survey reports</td>
<td>November → December 2006</td>
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<td>4. Presentation of SOARS Executive Summary Reports to</td>
<td>January 2007 → March 2007</td>
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<td>participating company’s management at their company</td>
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<td>5. SOARS Best Practices Conference – attendance by all</td>
<td>February 2007</td>
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<td>participating companies</td>
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<tr>
<td>6. Optional: Hold a SOARS Executive Retreat at your company’s location, facilitated by the SOARS Leaders, further addressing findings and implementation</td>
<td>Scheduled with participating companies</td>
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**SURVEY PRICING**

**Charter Members:** The first ten companies to sign up for participation in SOARS will be Charter Members.

Price for participating in SOARS:

- **SOARS Charter Participating Companies:** $25,000.
- **Regular SOARS Participating Companies:** $29,500.

The price includes providing participating organizations with survey reports featuring the participating organization’s own survey results plus benchmarking data from other participants.

Travel related expenses for presentation of the Executive Summary Report will be at cost.

Price for optional SOARS Executive Retreat is $6,000 plus travel expenses at cost.

**SURVEY DELIVERABLES**

Survey deliverables include:

1. Extensive graphs and tabular reports presenting overall and detailed survey results sorted by appropriate demographic information.
2. Thematic analysis with illustrative comments providing valuable information and insight.
3. Benchmarking comparison data from other participating organizations. The identification of the benchmarked organizations will be blinded (not revealed).
4. A one day conference for all participating organizations in the subscription surveys to be held first quarter 2007 (exact date of the conference to be determined). Survey results will be presented by company industry and size. Common problems, opportunities and best-practices identified in the surveys will be included in the presentations. Participants will have the opportunity to ask questions, hear presentations on customer and employee issues, and network with representatives from other client organizations. The cost of attendance is included in subscription survey pricing for up to three company representatives who may attend from each participating company.
5. Executive Summary Report analyzing the survey findings with recommendations for action based on survey results. This report will be presented to participating company’s management at the member’s office.
6. Aggregate report that covers findings and best practices from all participating companies.
7. **Optional** (at additional cost): Hold a SOARS Executive Retreat at your company’s location, facilitated by the SOARS Leaders (Jeana Wirtenberg, Ph.D., and Howard Deutsch), further addressing findings and implementation.
THE SURVEY LEADERS

Jeana Wirtenberg, Ph.D

Jeana Wirtenberg, Ph.D, President of Jeana Wirtenberg & Associates, LLC, leads a high impact, results-oriented consulting firm specializing in Organization Effectiveness, Leadership Development and Learning within and across the diverse sectors of business, government, nonprofits and academia. She is also currently an Executive Liaison and Research Associate with The Institute for Sustainable Enterprise at Fairleigh Dickinson University.

From 1996 to 2004, she was Director of Development, Quality and Organization Effectiveness at Public Service Enterprise Group, where she was responsible for a wide variety of functions to transform the firm and build organizational capacity. These included Leadership and Management Development, Organization Transformation and Change Management Consulting, Organization Design, Quality and Business Process Reengineering, Career Management and Diversity.

Formerly, Jeana held a variety of positions in AT&T from 1983 to 1996, and was District Manager, Human Resources Professional Development for AT&T’s Human Resources Division. Jeana received her Masters and Ph.D. in Psychology from the University of California at Los Angeles, and her Bachelor of Science degree in mathematics from the City College of the City University of New York, graduating Phi Beta Kappy, Magna cum laude.


Howard Deutsch

Howard Deutsch is CEO of Quantisoft, LLC. Quantisoft conducts a wide range of human resources surveys, customer satisfaction/opinion and technology support surveys. Quantisoft’s customers include Fortune 500 and middle market companies, and professional services firms across many industries. Quantisoft’s surveys provide managers with the information and insight they need to increase performance and competitiveness. To assist our customers in gaining the most value from our surveys, Quantisoft provides consulting support for interpreting survey results, recommending appropriate changes and solutions based on survey findings, and implementing change.

Howard’s experience includes ten years as Senior Vice President at NatWest. Howard was Chief Administrative Officer (CAO) of Consumer and Small Business Banking, directed the bank-wide Quality and Customer Service Program, the Consulting Services Division and the Customer Service Center. He previously held consulting and line management positions at Bankers Trust Company, Chase Manhattan Bank, RCA), Control Data Corporation, Computer Sciences Corporation and Grumman Corporation.

Howard received a BS in Industrial Engineering from Rensselaer Polytechnic Institute (RPI) and an MBA in Finance from Saint John's University. He was an Adjunct Professor for eight years in Seton Hall University’s MBA and undergraduate business programs, teaching human resources, organization development, corporate government and entrepreneurship courses.
TO DISCUSS PARTICIPATION IN SOARS

If you are interested in learning more about participation in SOARS, or to receive additional information, please contact Howard Deutsch or Jeana Wirtenberg:

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