

# **Comparison Assessment**

## Merger Comparison Example



BARRETT VALUES CENTRE

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To build a high performing, values-driven organisation that engenders high levels of employee engagement requires leadership commitment and an ongoing process of values management that becomes deeply engrained into the ethos of the organisation. The starting point is to find out what is and what is not working.

The Culture Comparison Assessment determines how distinct groups correlate with one another. The assessment shows what a group finds important from an individual perspective, how they, as a group, perceive their current culture and which direction they seek going forward.

Comparing groups reveals where similarities lie and where viewpoints differ. The assessment highlights existing mutual strengths, unveils potential problem areas, and indicates areas where groups may learn from one another.

# EXECUTIVE SUMMARY AND RECOMMENDATIONS

The following pages give a quick, high-level synopsis of the findings contained later in this report.

## Cultural Comparison Summary

### Merger Comparison Example

	Company A 165 Participants	Company B 227 Participants
Culture Score		
PV/CC Matches		
CC/DC Matches		
Cultural Entropy®		
Balance Index	<p> <span style="color: orange;">■</span> Foundation  <span style="color: green;">■</span> Evolution  <span style="color: blue;">■</span> Impact         </p>	<p> <span style="color: orange;">■</span> Foundation  <span style="color: green;">■</span> Evolution  <span style="color: blue;">■</span> Impact         </p>

## CULTURAL HEALTH

### Company A

- **Culture Score:** A fair Culture Score suggests the group may be on track, yet some areas require improvement to build resilience.
- **PV/CC Matches:** People sense little to no connection between their personal values and their experience in the workplace.
- **CC/DC Matches:** People here are confident that the organisation is moving in the right direction.
- **Cultural Entropy:** The degree of Cultural Entropy is low and healthy, suggesting this is a positive and effective workplace.
- **Balance Index:** The difference in focus between the areas of Foundation and Impact indicates a large imbalance between meeting basic needs and fulfilling the purpose of the organisation. Almost two thirds of all the focus of this group is placed at Levels 1 to 3.

### Company B

- **Culture Score:** A poor Culture Score indicates some ongoing issues that are in need of being addressed.
- **PV/CC Matches:** People experience a strong connection to their personal values in the workplace and are engaged in their work.
- **CC/DC Matches:** People here too are confident that the organisation is moving in the right direction.
- **Cultural Entropy:** A number of problems have been highlighted, resulting in a relatively high level of Cultural Entropy. This suggests that leaders may need help and support to address issues and build a healthier culture.

- **Balance Index:** The difference in focus between the areas of Foundation and Impact indicates a large imbalance between meeting basic needs and fulfilling the purpose of the organisation. While the imbalance is slightly less than Company A, this group is also highly focused on meeting basic needs.

## ADDITIONAL INSIGHTS

1. While the two organisations have a number of differences currently, it is interesting to see the degree of similarity in the personal values of the employees of both, suggesting that from a personal perspective, both groups of staff share a number of personal qualities. While overall, the Culture of Company B is less healthy than that of Company A, the employees of Company B experience more of what is important to them personally in the workplace and so indicate stronger engagement. Both groups of employees have a good degree of confidence in the current direction of their respective organisations.
2. Both groups are highly focused on the more foundational aspects of the business, with most attention at Level 3 – Performance. Almost half of all the energy in Company A is at this level and in the Organisational Perspectives area of Finance & Effectiveness. This may indicate an over-emphasis here to the detriment of other areas. Most problems also occur at this level for both groups, although Company B has more issues, with 'bureaucracy' highlighted particularly. While the degree of Cultural Entropy is higher for Company B, staff members here see positive top focus at Level 4 – Evolution and Level 5 – Alignment, which are gaps for Company A. They also experience a number of positive 'relationship-type' values which are missing in Company A, who instead experience 'internal competition'. In contrast, Company A has positive top focus at Level 1 – Viability with a focus on 'profit', whereas Company B have a top issue in this area in 'caution'.
3. However, despite some differences currently, the degree of agreement, with 8 Desired values in common, suggests that both groups are aligned about what is most important for their future. This bodes well for a merger, as it seems that both groups want to move in the same direction. Both groups recognise that in the Organisational Perspectives, more focus is needed in respect of Direction & Communication. Both groups want more 'leadership'. Explore what is missing currently in this regard and what more they see is needed.
4. Both groups have something they can help the other with. Company A recognises most change is needed for them in respect of Trust & Engagement. The call for more 'collaboration' and 'teamwork' will help here. Company B should be able to help with 'teamwork' which is a quality they already possess. In turn, Company A can help the other group in respect of their new requests to focus on 'being the best' and 'profit'.

## SUGGESTIONS FOR IMPLEMENTING CHANGE

1. Develop a plan to deliver internal communication around these results. Remember to celebrate strengths, as well as looking at what can be improved.
2. Conduct focus groups to gain greater understanding around specific areas or issues and planning steps for improvement. An overview of steps you might take can be found in [Get Connected](#) pages 52-54 or in the following exercise: [From CVA to Action](#)
3. Examine how the business strategy aligns with the culture of the new organisation as seen in the results. [Align Strategy & Culture](#)
4. Following these communication exercises, identify which key outcomes or processes that the group wants to achieve or improve. Here are some examples of possible next steps:
  - a) What might the groups learn from one another?
  - b) What steps can you take to honour the call for more relationship focus across the group?

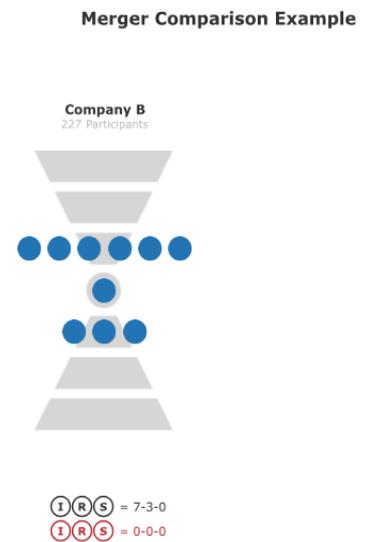
- c) To what degree is the gap at Level 6 - Collaboration a missing need for both groups? There is an underlying call for more focus here. Find out from participants what they believe the key priority to be.
- d) How might you continue to understand the needs of your customers as requested in your results? [Connect to The Customer](#)
- 5. Recognise that the leader of a group has a significant impact on the culture of the group they lead. Consider how this may impact on your results? [Cultures Created by Leadership Teams and Groups](#)
- 6. There is a call for change. After the merger, if you are looking to undergo a transformation project, be sure to help everyone understand and support the change journey. Download the free book, [The Dynamics of Change](#) for an overview of things to consider. The following exercises also may be helpful: [The Change Curve](#), [Important Questions](#), and [Force Field Analysis](#).
- 7. What help might the leaders in the organisation need to understand and address both the tangible and intangible aspects of any changes planned? [Balanced Action Plan](#)
- 8. Consider which values the new organisation wants to espouse for the long-term. Then, considering the results across the groups, select a set of 3-4 shared values to which people can connect and demonstrate. Define the meaning and expected behaviours that would bring these values to life in the organisation.

## SECTION 1: PERSONAL VALUES

### Levels Distribution and Types of Top Personal Values

#### Comparison of Personal Values

- 7 Contribution
  - 6 Collaboration
  - 5 Alignment
  - 4 Evolution
  - 3 Performance
  - 2 Relationships
  - 1 Viability
- Positive/Potentially Limiting**
- I Individual
  - R Relationship
  - S Societal
- Positive Value
  - Potentially Limiting



#### KEY SIMILARITIES

**Both groups** show most focus at Level 5 – Alignment, indicating that a sense of meaning and purpose is important to them.

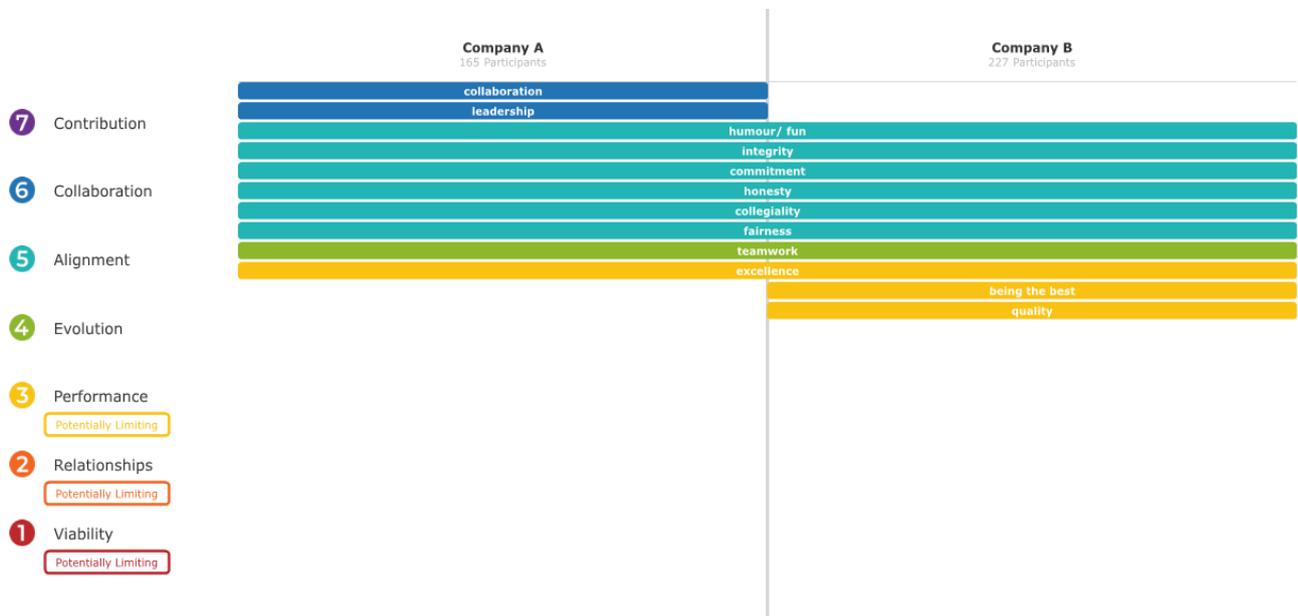
#### KEY DIFFERENCES

**Company A** people are slightly more relationship oriented than **Company B** people and they place top focus at Level 6 – Collaboration, which appears to be a gap for the other group.

## Top Ranked Personal Values

### Comparison of Personal Values

### Merger Comparison Example



### BALANCE INDEX OF COMMON PERSONAL VALUES

There are **8 common values** across the groups. This shows a good degree of similarity between them.

There is strong resonance at Level 5 – Alignment, where all the top values selected are the same for both groups.

**Impact:** **Company A/Company B:** Are authentic and just in their exchanges. They welcome close allegiances with others and enjoy time to share laughter. They demonstrate dedication in their endeavours.

**Evolution:** **Company A/Company B:** Work well together with others.

**Foundation:** **Company A/Company B:** Strive to excel.

### UNIQUE PERSONAL VALUES

#### Company A

- Build partnerships and are willing to help guide others.

#### Company B

- Want to lead the field and appreciate high standards.

## SECTION 2: CURRENT CULTURE VALUES

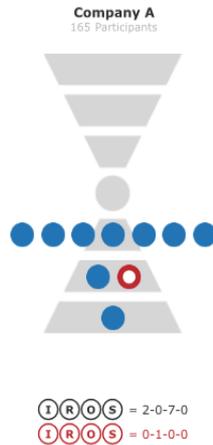
### Levels Distribution and Types of Top Current Culture Values

#### Comparison of Current Culture Values

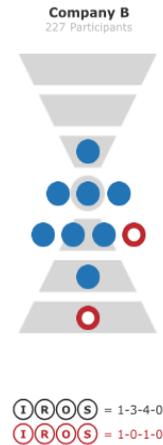
- 7 Contribution
- 6 Collaboration
- 5 Alignment
- 4 Evolution
- 3 Performance
- 2 Relationships
- 1 Viability

**Positive/Potentially Limiting**

- I Individual
- R Relationship
- O Organisational
- S Societal
- Positive Value
- Potentially Limiting



#### Merger Comparison Example



#### KEY SIMILARITIES

**Both groups** show most focus at Level 3 – Performance, indicating a drive to achieve excellence. This is particularly strong for **Company A**.

#### KEY DIFFERENCES

**Company A** people chose no positive 'relationship-type' values in their Current Culture and experience issues here, compared to three positive 'relationship-type' values from **Company B**.

People in **Company B** experience problems undermining business performance and health. This group also see top focus at Level 4 – Evolution and Level 5 – Alignment, which is a current gap for **Company A**.

## Top Positive Values in Current Culture

### Comparison of Current Culture Values

#### Merger Comparison Example



### BALANCE INDEX OF COMMON POSITIVE VALUES

These groups have **3 positive common values** in the Current Culture. This shows some similarities between the experience of the groups, yet with a number of key differences.

**Impact:** No shared values.  
**Levels 5-7**

**Evolution:** No shared values.  
**Level 4**

**Foundation:** **Company A/Company B:** Look to meet customer needs, demonstrating high standards of conduct and deliverables.  
**Levels 1-3**

### UNIQUE POSITIVE VALUES

#### Company A

- Strong focus on performance, meeting targets and striving to lead the industry.
- Highly business oriented, with focus on building a strong bottom line.
- Attention to ensure everyone finds the most effective approach.

#### Company B

- Focus on group efforts to gain agreement, building a sense of allegiance while allowing people to be themselves.
- Upholding high standards.

## Cultural Entropy Score and Top Potentially Limiting Values

Cultural Entropy is the measure of dysfunction within the system, based on the percentage of votes for potentially limiting values. Issues may stem from internal or external factors, or fear-based actions and behaviours of leaders, managers, and supervisors.



### CULTURAL ENTROPY SCALE

**Healthy** **Company A:** Well-functioning.

**Requiring Focus** **Company B:** Issues requiring cultural and structural transformation, as well as leadership coaching.

### COMMON POTENTIALLY LIMITING VALUES BY LEVEL

**Company A/Company B:** Most problems occur at Level 3 – Performance, reflecting concerns around the effectiveness of systems and processes.

**Levels 1 - 3** There are no top potentially limiting shared values.

## UNIQUE POTENTIALLY LIMITING VALUES

### Company A

- **Internal competition** is potentially limiting when it prevents open communication and the sharing of information, resources or ideas. The focus is on self-interest rather than the common good.

### Company B

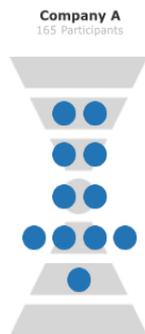
- **Bureaucracy** can be a form of control. Too much bureaucracy can block creativity and entrepreneurial spirit and may erode accountability and trust. Bureaucracy can lead to ineffectiveness.
- **Caution** is considered to be potentially limiting when it hinders risk-taking and prevents the full exploration of new ideas.

## SECTION 3: DESIRED CULTURE VALUES

### Levels Distribution and Types of Top Desired Culture Values

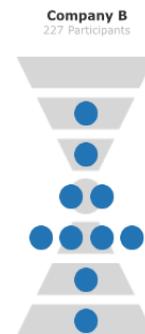
#### Comparison of Desired Culture Values

- 7 Contribution
  - 6 Collaboration
  - 5 Alignment
  - 4 Evolution
  - 3 Performance
  - 2 Relationships
  - 1 Viability
- Positive/Potentially Limiting**
- I Individual
  - R Relationship
  - O Organisational
  - S Societal
  - Positive Value
  - Potentially Limiting



I R O S = 2-4-5-0  
I R O S = 0-0-0-0

#### Merger Comparison Example



I R O S = 1-3-6-0  
I R O S = 0-0-0-0

#### KEY SIMILARITIES

**Both groups** see the need for most attention to be placed at Level 3 – Performance, suggesting a desire to elevate standards or streamline efficiencies.

**Both groups** want to focus most on meeting business needs. This is an increase in focus from the Current Culture for **Company B**.

There are top values for both groups covering Levels 2 – 6.

#### KEY DIFFERENCES

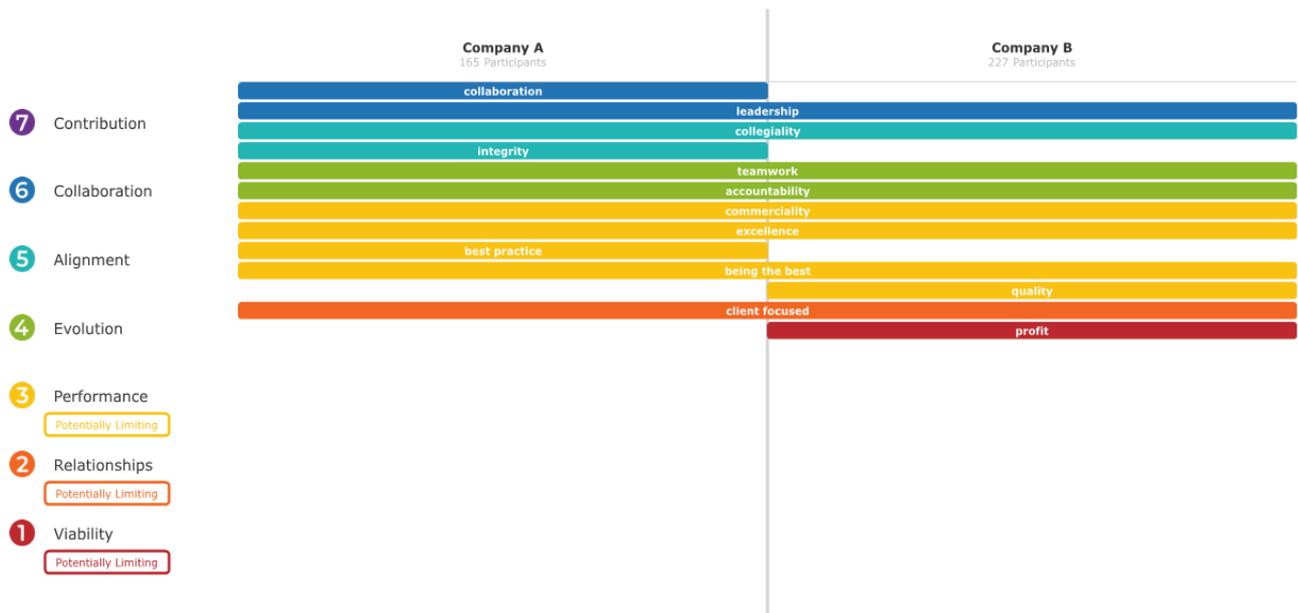
**Company B** sees the need for positive top focus at Level 1 – Viability, replacing the top potentially limiting value here currently.

**Company A** is asking for a greater emphasis on 'relationship type' values which are missing in the top values of their Current Culture.

## Top Ranked Desired Culture Values

### Comparison of Desired Culture Values

#### Merger Comparison Example



### BALANCE INDEX OF COMMON DESIRED VALUES

There are **8 common values** across the groups. This reflects a strong resonance between them around the key priorities they see for the future and suggests the groups should work well together, if they are able to build upon the requested values they share.

**Impact:** **Company A/Company B:** Focus on building a sense of allegiance between colleagues, guided by strong leaders.  
**Levels 5-7**

**Evolution:** **Company A/Company B:** People working well together and taking ownership of their commitments.  
**Level 4**

**Foundation:** **Company A/Company B:** Focus on meeting client needs and upholding the highest of standards. They wish to lead the industry, ensuring operating practices are good for business.  
**Levels 1-3**

### UNIQUE DESIRED VALUES

#### Company A

- Efforts to share ideas on how to work most effectively, working in partnership with one another.
- People acting with principle.

#### Company B

- Attention to high calibre deliverables, while ensuring they build a strong bottom line.

## SECTION 4: OTHER INDICES

### Top Values Alignment

#### Values Matches

#### Merger Comparison Example

	Company A 165 Participants	Company B 227 Participants
<b>Personal &amp; Current Culture Matches:</b> 4+ Very Good 3 Good 2 Fair 1 Poor 0 Very Poor	<b>1</b> excellence	<b>4</b> collegiality excellence quality teamwork
<b>Current &amp; Desired Culture Matches:</b> 7+ Very Good 5-6 Good 3-4 Fair 1-2 Poor 0 Very Poor	<b>5</b> being the best best practice client focused commerciality excellence	<b>5</b> client focused collegiality excellence quality teamwork

#### PERSONAL & CURRENT CULTURE MATCHES

##### Very Good

**Company B:** People are highly engaged and fully show their authentic self in the workplace.

##### Poor

**Company A:** People appear to be somewhat disengaged and unable to bring their personal priorities to work.

#### CURRENT & DESIRED CULTURE MATCHES

##### Good

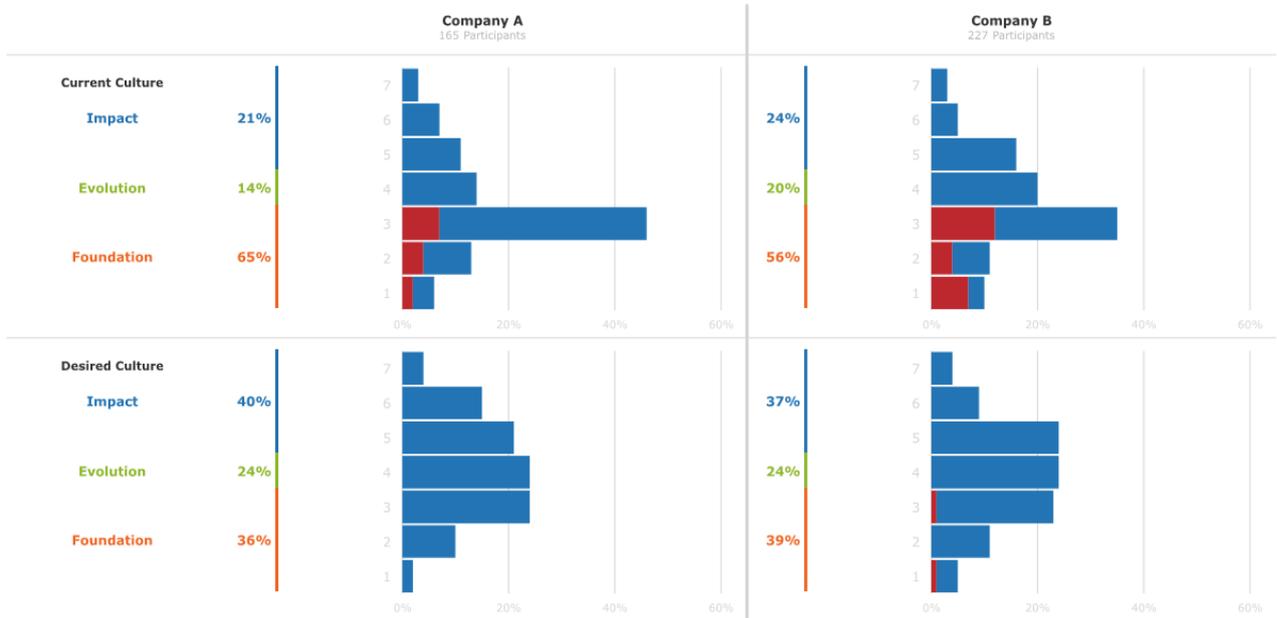
**Company A/Company B:** People have a good degree of confidence in the current direction of the organisation.

## Balance Index of Full Values Distribution

The Balance Index shows three major drivers: **Foundation** (Levels 1, 2, 3) relates to effectiveness. **Evolution** (Level 4) concerns adaptability and employee participation. **Impact**, (Levels 5, 6, 7) shows systemic good. Balance signifies organisational sustainability and resilience.

### Balance Index

### Merger Comparison Example



### CURRENT CULTURE SIMILARITIES

**Both groups** place most focus on the Foundation areas. This suggests emphasis on meeting basic needs. However, this may be to the detriment of attention to other areas.

### CURRENT CULTURE DIFFERENCES

While still low, **Company B** currently has more focus in the areas of Evolution and Impact than **Company A**.

### DESIRED CULTURE SIMILARITIES

**Both groups** appear to have a very similar outlook, with both recognising the need to focus more attention to the areas of Evolution and Impact.

## Organisational Perspectives

Current and Desired values' shifts by category reveal possible areas for greater strategic focus.

### Organisational Perspectives – Current Culture

Merger Comparison Example



#### Finance & Effectiveness

**Company A/Company B:** Strong focus is currently placed in this area. Almost half of all the positive energy available for work is currently placed by Company A here.

#### Agility & Innovation

**Both groups:** Show little focus here.

**Both groups:** Recognise there is more to do in this area.

#### Employee Well-Being

**Company B:** Slightly more attention is placed in this area compared to Company A.

**Company A:** Believes more could be done here.

#### Trust & Engagement

**Company B:** Place most focus here between the two groups.

**Company A:** Sees this area is the one where it needs to change most.

#### Direction & Communication

**Both groups:** Place similar attention to this area.

**Both groups:** Recognise they need to devote similar degrees of new focus here for the future.

#### Sustainability & Society

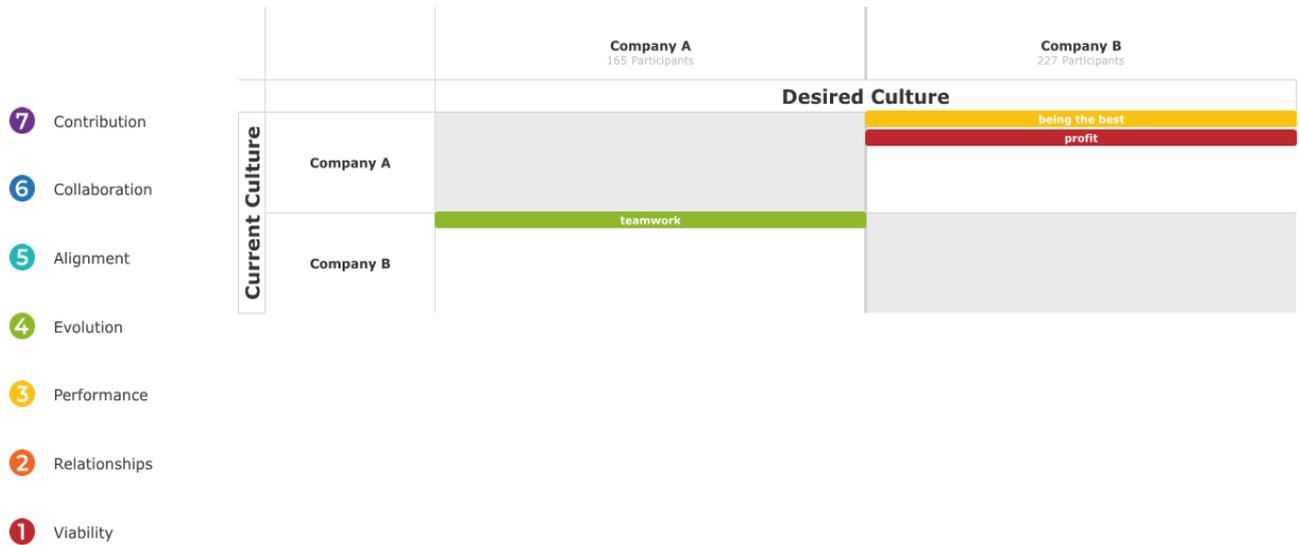
**Both groups:** Place least attention here.

**Company B:** Sees that a little more could be done here.

## SECTION 5: LEARNING OPPORTUNITIES

### Development Opportunities

### Merger Comparison Example



### WHAT CAN THE GROUPS LEARN FROM ONE ANOTHER?

- **Company A:** Can help **Company B** in their aspirations to become industry leaders and build a strong bottom line.
- **Company B:** Can provide ideas for **Company A** on how to focus more on group efforts.

## THE BARRETT MODEL



**Level 1: Viability** represents the need for stability; be it financial, ensuring a sense of security, or the relevance of health and safety.

**Level 2: Relationships** reflects the attention to and importance of interpersonal relationships.

**Level 3: Performance** is about the accomplishment of objectives; leading to confidence, a sense of pride and self-worth.

Potentially limiting values are those words/behaviours that reflect possible elements of fear. They are located in Levels 1-3 only.

*Potentially limiting values are those words/behaviours that reflect possible elements of fear. They are located in Levels 1-3 only.*

**Level 4: Evolution** reveals a willingness to adapt and be open to new perspectives.

**Level 5: Alignment** is the embodiment of living and demonstrating one's true nature.

**Level 6: Collaboration** represents higher order partnerships where alliances are formed, and people are positively impacted.

**Level 7: Contribution** is the fulfilment of purpose in service of the greater good.

## **ORGANISATIONAL PERSPECTIVES**

*While Barrett Analytics provide insight into the culture of an organisation from various viewpoints, the Organisational Perspectives reveal where the focus is with regard to its performance metrics, employee welfare, and impact to help guide its long-term success. These areas include:*

### **PROCESS**

#### **Finance & Effectiveness**

Finance & Effectiveness highlights fiscal health and performance using values that reflect organisational growth, key performance indicators, and customer satisfaction.

#### **Agility & Innovation**

Agility & Innovation reveals on an organisation's ability to adapt and to evolve its products, processes, and new ways of thinking.

### **PEOPLE**

#### **Employee Well-Being**

Employee Well-Being shows the extent to which people feel supported, equipped, and treated fairly within the organisation.

#### **Trust & Engagement**

Trust & Engagement relates to employees having opportunities to work together effectively, build mutual confidence, and develop a sense of ownership and empowerment.

### **PURPOSE**

#### **Direction & Communication**

Direction & Communication depicts the degree of clarity and focus about the organisation's vision and mission, as well as how information is communicated and shared.

#### **Sustainability & Society**

Sustainability & Society illustrates the organisation's efforts around its long-term impact and its contribution to the greater good.