FROM CVA TO ACTION

Session Leader Guide

This exercise is based on Barrett Values Centre's CTT (Cultural Transformation Tools) assessment called CVA (Culture Values Assessment). In order for you to work with these tools you need to be a trained CTT Consultant, or work with someone who is CTT certified user. If you need to get in contact with a certified CTT consultant, go to www.valuescentre.com/partners.

Organisational and team culture transformation begins with personal transformation, so if possible it is recommended that you combine this exercise with the exercise “From PVA to Action” on page 89. We especially recommend that you start with yourself first, if you are the leader of the team that you would like to transform the culture with. This will not only provide you with a better understanding and consciousness about yourself but also about the CTT language and tool to be used.

As we have learned that organizational transformation must critically start with, and be modeled by, the leader, this workshop is designed to help you initiate this process within your team. If you want to get a better overview of the whole process, then read “To measure and grow your culture” on page 52-55.

There is no “one-way” to run this type of workshop, so we have provided an alternative way for each of the steps for you to choose from to best fit your group and way of working. The important thing to remember is that you work in an involving and co-creating way. Regard this as an opportunity for you to engage and listen to and act upon what your team find important and value to make you as a team perform better together. Remember, the journey is as important as the end result and that when you decide to run this exercise you also start (or maintain) the cultural transformation journey in your team.

OBJECTIVE

To share and discuss the outcomes of a values assessment within your team, and to deeper explore the meaning and getting an in depth understanding of the values that people choose in the assessment. Then to:

a. Identify the key values and what they specifically mean
b. Describe the behaviours that do or would demonstrate the values
c. Celebrate what is right and examples of best practices that are already taking place
d. Agree causes and corrective actions of potentially limiting values
e. Distinguishing between quick win actions and a longer term direction of what the high performing culture should look and feel like.

TIME

The estimated time for this exercise is approx. 4-7 hours.
BEFORE THE SESSION

1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide. Connect with a trained CTT consultant and agree on agenda and set up (make sure to plan time for this).
3. Book a meeting room. Make sure that the room makes it possible to split up the group into groups of 3-5 persons in an acceptable way. Make sure the room has the following:
   - PC projector.
   - Flip chart(s).
   - Tape or other material to affix flip chart sheets to the wall.
   - Large post-it notes
   - Markers: different colours.
   - Optional: small sticky notes or coloured dots for voting.
4. Decide if you want to run this in combination with an PVA or IVA workshop (tool: From PVA to Action).
5. Send out the invitations for your group meeting at least four weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved. For the CVA:
   - Review the values list template to be used so it is well aligned with the language and words used in your type of business. If your team already has a list of values (espoused values) make sure these values are included in your values list.
   - Decide if the focus of the assessment is going to be on how the team performs, or- on how the team perceives that the organization performs, and model your assessment-questions accordingly.
   - Make sure that you send the team the link to the assessment on time (e.g. 3 weeks) before the workshop.
6. Prepare a presentation together with your trained CTT consultant and identify the key overall outcomes of the assessment. Make sure to include the 7-level model and how to read the tools in the presentation. (In case there’s much demographics you will need to decide which overviews are most relevant, e.g. a comparison of current culture outcomes between units, a graphic that compares entropy, etc. You may even include some industry trend numbers; those are available to trained CTT consultants).
7. It helps when the 7-level model is customized to the language and outcomes for this context, where for each of the levels that you present, contains the values that show up in the top 10 outcomes of the CVA. Thus presenting the logic behind the results interpretation early on in your conversation.
8. If needed, print the presentation and/or the CVA results as a handout.
9. Prepare your own answers to the questions that you will ask your audience. Have your own answers to those questions ready as well. We suggest to prepare: “What surprises you?”, “What becomes clear to you?”, “What stands out as being positive? and “What stands out as being challenging?”.
10. It is also good if you prepare the questions you would like to ask the group to further explore and understand the results.
11. Make sure you have practiced the presentation and feel comfortable with the material.
12. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
13. Try to come at least 20 minutes before everyone else.
14. Setup the room with blank flip chart sheets on the walls; well-spaced out so that people can easily read the charts once writing is on them.
15. Be prepared to show the slides.
16. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.
17. Make sure you take notes during the meeting or arrange for someone to do so.

DURING THE SESSION
1. Present the Purpose, Objective of the exercise. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Introduce the exercise by sharing the steps to be taken (see “Step by Step Instructions” below). Make sure everyone understands the exercise. Allow time for questions and concerns.
3. Explain the importance of understanding the importance of honest and open dialogue, based on respect and trust. Underline that we do this to perform better together in order to reach our strategic objectives and operational results. Remember, the process is as important as the outcome.
4. Conclude the exercise by a reflection followed by what you expect to be the next step on your culture build-up journey.

AFTER THE SESSION
1. Write and send out minutes as soon as possible after the meeting with your agreed key actions and wanted behaviours. Enclose the slides you showed (if requested by any of the participants).
2. How do you intend to reinforce your team's conclusions and make your progress visible? For instance, visual aids, questions, recognition, etc.
3. Now, that you have started to create a shared understanding of expected behaviour, make sure your own personal priorities and behaviour is also aligned, as a leader.
4. How do you intend to follow up the session? A good idea is to plan a team follow-up discussion and also an individual follow-up at your performance review meeting with the participants. See “Culture Report” on page 185, for ideas and tips for continuous follow up and learning.
### Agenda/Step by step instructions

#### A) Presenting the assessment outcomes (2-3 hrs)

1. **Connect to your team objectives** and long term goals, and describe how this aligns with today’s culture assessment.  
   
   5–10 min

2. **Deliver the Seven Levels of Consciousness** presentation and how to read CVA results using a neutral CVA example and explain the indices. This gives the participants an opportunity to see what the plots can show, what the white dots and other unknown items mean. For an example presentation check at www.valuescentre.com/getconnected.  
   
   20 min

3. **Put the team results on the screen** (and/or as handouts). Let the results speak for themselves. Be prepared to answer questions about the model and tool structure. Avoid sharing your conclusions of what you see at this point.  
   
   5–10 min

4. **If the group is larger than 6 people**, divide them into smaller groups of 3-5 people. Give them 45-60 minutes to discuss and write answers to the following questions on flipcharts you have prepared on the wall:  
   - What stands out in the results—any surprises, questions?  
   - What are the positives/strengths? List those.  
   - What are the challenges or opportunities for development? List those.  
   
   Underline that the objective in your conversation is to explore rather than explain; please invite each other to share by asking yourself open questions.  

   **Alternative:** Hand out Template 1 to everyone and ask them to first individually reflect and answer, then talk about it to reach a shared meaning within the groups of 3-5 people.

#### Example:

<table>
<thead>
<tr>
<th>Reflection on results</th>
<th>Team name: A-Team</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What becomes clear to you?</strong></td>
<td><strong>What is positive?</strong></td>
</tr>
<tr>
<td>Predictable but &quot;dull&quot;</td>
<td>Personal and Desired fairly similar and they reflect Volvo IT care values</td>
</tr>
<tr>
<td>Typical maintenance team</td>
<td>Strong will to move upwards to more of common good</td>
</tr>
<tr>
<td>Current values are empty on common good levels</td>
<td>We see need for more focus on corp. evolution</td>
</tr>
<tr>
<td>We want to increase more on internal cohesion (level 5)</td>
<td>Few limiting values Low Entropy (7%)</td>
</tr>
<tr>
<td>Very focused on level 3 and 4 at the moment (last 3-4 months)</td>
<td>Many choose the same value words in desired resp. current situation</td>
</tr>
<tr>
<td>We seem to share information but not co-operate</td>
<td></td>
</tr>
<tr>
<td>Finance is not an issue</td>
<td></td>
</tr>
<tr>
<td><strong>What can be improved?</strong></td>
<td><strong>Anything negative?</strong></td>
</tr>
<tr>
<td>More of common good</td>
<td>We have no values on &quot;Client Relations&quot; and &quot;Finance.&quot;</td>
</tr>
<tr>
<td>Co-operate more</td>
<td>Corporate evolution has a potentially limiting value</td>
</tr>
<tr>
<td>Have some fun</td>
<td></td>
</tr>
<tr>
<td>Limiting value &quot;Caution&quot;—What does it mean?</td>
<td></td>
</tr>
</tbody>
</table>
5. **Have a plenary dialogue** around all the group’s results by reviewing the flipcharts (or templates). Identify the key themes and observations. At the end of the conversation, offer your own insights to those questions.

6. **Next question to be asked:** “What do we need to explore further in order to define our next steps?” When needed you may want to vote, determining which of the values you need to focus on for today’s session. Document the thoughts on a flipchart.

7. **Agree upon which are the key values** to address to perform better together and reach your short- and long term objectives. Conclude with the team what values you would like to explore and work with during the rest of this workshop, and which to address later.

   **Alternative:** Hand out Template 2 and ask everyone to identify which potentially limiting values you need to explore and address to become a low fear team. Let everyone select 1-3 potentially limiting values, depending on how high your overall entropy is. And ask which 2-4 positive values they would like to explore and address to become a high performing team and reach our team objectives. Collect all votes in an anonymous way and display the scores on a flipchart. Have a whole group talk and dialogue about the outcome. Don’t only follow the score, but listen to the energy and arguments of the group, before you make your final priority as a group of values to work with. Offer your insights after the discussion is complete.

**B) Exploring key values and behaviours for further development (2-3 hrs)**

1. **Create breakout groups**

   Depending on group size you determine how many values you would like to focus on. We advise to organize breakout groups with each at least around 3 participants. Make sure that each breakout group has some wall-space and a flipchart (or use Template 3a and 3b).

2. **When exploring Potentially Limiting Values**

   a) The survey identified people’s view of what is limiting our ability to succeed. You each have a number of post-it notes. Please write down for the value of your focus: what are the behaviours that we show in the workplace that underline this value? It is important for our leaders to understand how people are experiencing these values or behaviors. Ask the group to please make their comments in complete sentences or clear bullet points on how you see it.

   b) Now ask the group to stick the post-its on a flipchart whilst reading them out.

   c) After this: ask the group to cluster the behaviours and to then come up with one headline for each of the clusters.

   d) Ask the group: in one sentence, how would we define this value for our organization?

   e) Then go into the aspect of impact and ask the group: How much does this value impact our day-day work in terms of costs/ effectiveness/ productivity/ motivation etc? Note down on a post-it.
DIALOGUE TOOLS

f) Gather post-its on a flipchart: ask the group to prioritize - what is the biggest cost and can this be roughly quantified?

**Alternative:** When exploring Potentially Limiting Values (using Template 3a) 45–60 min

a) Hand out Template 3a

b) Assign groups of 3-5 people to work with one limiting value at the time.

c) Ask them to individually start to reflect and define their personal view of “Definition” and “Culture” of their selected potentially limiting value.

d) Then ask the group to talk about their individual views and come up with shared “Definition” and “Culture” of their selected potentially limiting value.

e) Based on this outcome, ask the group to brainstorm actions and behaviors that would reduce or eliminate their selected potentially limiting value in our daily operation. Then ask them for each of their identified actions to define if it is ME (each one of us), WE (a team effort) or the COMPANY (structural issue) that has to make this action happen.

f) Then gather all groups and share and discuss your findings and a proposal of actions.

3. When exploring Positive Values

a) The survey has identified Personal, Current or Desired values that will have a positive impact when those are built upon further. In order to create a picture of what this would look like we ask the group to imagine the value …………………………… is now fully adopted by everyone in this team. What are the behaviours that we are seeing us operate by? Ask people to record their thoughts on post-it notes.

b) What does it look and feel like? What are people doing, saying, and feeling? What is different about the place?

c) Once everyone has finished doing this, work as a team to cluster the thoughts into groups and develop a short title to capture the meaning of each cluster

d) Discuss: what is our current position?

- Score on a scale of 0-10, where 10 is “value is fully present” and 0 is “value is not present”.

  - Discuss your team-score, explore why there are differences and try to reach consensus on one score. What behaviours are already carried out? What behaviours do we NOT yet see that would make this a higher score (prioritise).

  In thinking about behaviours, share real life stories that illustrate these behaviours.
**Alternative: When exploring Positive Values** (using Template 3b)  

45–60 min

a) Hand out Template 3b

b) Assign groups of 3-5 people to work with one positive value at the time.

c) Ask them to individually start to reflect and define their personal view of “Definition” and “Culture” of their selected positive value.

d) Then ask them as a group to talk about their individual views and come up with shared “Definition” and “Culture” of their selected positive value.

e) Based on this outcome, ask the group to brainstorm actions and behaviors that would improve and grow the selected positive value in our daily operation. Then ask them for each of their identified action to define if it is ME (each one of us), WE (a team effort) or the COMPANY (structural issue) that has to make this action happen.

f) Then gather all groups and share and discuss your findings and a proposal of actions.

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**Example:**

**Template 3b:**

**Team name: A-Team**

<table>
<thead>
<tr>
<th>Desired Value</th>
<th>Definition</th>
<th>Culture</th>
<th>Actions to Create</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooperation</td>
<td><strong>How do WE define this value?</strong>&lt;br&gt;Sharing problems, challenges and opportunities.&lt;br&gt;Take care and support each other.&lt;br&gt;Sharing best practice.&lt;br&gt;Help each other.&lt;br&gt;Sense of joint responsibility and accountability.&lt;br&gt;Propose actions - think forward.&lt;br&gt;Shared vision and long term objectives.&lt;br&gt;Shared values.</td>
<td><strong>How does this value (behaviour) look like when all its best?</strong>&lt;br&gt;Unselfish helping someone else to succeed or take on a challenge.&lt;br&gt;1+1=3&lt;br&gt;You don’t have to ask for co-operation, it just happens! The joy of sharing a success.&lt;br&gt;Pure and true feeling of “we” – “us”.&lt;br&gt;Trust - I know I will get help when I have a challenge or ask for help.&lt;br&gt;Lean, but still possible to free resources.</td>
<td><strong>What actions can we take to make this value grow?</strong>&lt;br&gt;<strong>ME</strong> - Have more of common goals. Take active part of defining our shared goals and KPI’s.&lt;br&gt;<strong>ME</strong> - You need to sacrifice your own local/functional priorities in order to reach our common goals.&lt;br&gt;<strong>COMPANY</strong> - Create a shared source pool of key resources, maximize our utilization.&lt;br&gt;<strong>ME/WE</strong> - Improve our internal communication, be open and honest.&lt;br&gt;<strong>ME</strong> - Bring up and share our success stories and make them visible.</td>
</tr>
</tbody>
</table>
4. From dialogue to plan

- Ask participants: “Once we get agreement on the values and behaviours, the real journey begins. In leading this, then what are the top three things you as a team can do to solve current bottlenecks and/or make those aspired values come alive and stay real?”
- Be specific, actionable, and measurable.
- Also ask the group: if you yourself were to take one step in bringing the journey on this value more to life in your workplace: what step would you be prepared to take?
- Note all suggestions; those will form the basis for your Culture Development Plan – Template 4 (See example on page 54).

Example:

<table>
<thead>
<tr>
<th>Value</th>
<th>Prioritized actions/behaviours</th>
<th>Follow up (How)</th>
<th>By When</th>
<th>By Whom</th>
<th>Status</th>
</tr>
</thead>
</table>

If time allows you, then involve the whole group in identifying the actions and behaviors and put them into your Culture Development Plan. If you run short on time, you could also assign a small group who takes all the proposed actions and works them into a Culture Development Plan. The proposal plan will then be presented to the whole team for comments and approval at a later meeting.

5. Thank everyone.

Explain next steps.
Ask for some fast feedback on how the session went for people – what worked well and/or what could be improved.
<table>
<thead>
<tr>
<th>Team name:</th>
<th>What becomes clear to you?</th>
<th>Anything negative?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team name:</td>
<td>Desired Values</td>
<td></td>
</tr>
<tr>
<td>-----------</td>
<td>----------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Potentially Limiting Values</td>
<td></td>
</tr>
</tbody>
</table>

Template 2: My priority of values to work on
<table>
<thead>
<tr>
<th><strong>Potentially Limiting Value</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Potentially Limiting Value</strong></td>
</tr>
<tr>
<td><strong>Definition</strong></td>
</tr>
<tr>
<td>How do WE define this value?</td>
</tr>
<tr>
<td><strong>Culture</strong></td>
</tr>
<tr>
<td>How does it look like/appear in our daily work situations?</td>
</tr>
<tr>
<td><strong>Preventive actions</strong></td>
</tr>
<tr>
<td>What actions can we take to make this value grow?</td>
</tr>
</tbody>
</table>

**Team name:**

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**Handout:** From CVA to Action

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<table>
<thead>
<tr>
<th>Team name:</th>
<th>Desired value</th>
<th>Actions to Create</th>
<th>Culture</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>How does this value (behaviour) look like when at its best?</td>
<td>How do WE define this value?</td>
</tr>
</tbody>
</table>
### Culture Development Plan

**Team name:**

<table>
<thead>
<tr>
<th>Value</th>
<th>Prioritized actions/behaviours</th>
<th>Follow up (How)</th>
<th>By When</th>
<th>By Whom</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
Optional worksheet for CVA analysis

Based on the results of CVA, complete the following statements:

a. The organization/team has the following matching personal and current culture values:

b. The organization/team has the following matching current and desired culture values:

c. The organization/team identified the following potentially limiting values:

d. The organization/team has a level of cultural entropy of:

e. The most important Value Jumps—the values that employees want to see more of are: These are the values that scored more highly in the Desired Culture than in the Current Culture.

f. Based on the results of this survey we identified the following actions to improve the organization/team’s performance:
   The goals should be SMART – Specific, Measurable, Agreed, Realistic, Time-Phased.

<table>
<thead>
<tr>
<th>No.</th>
<th>Actions</th>
<th>Description</th>
<th>Alignment Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. 3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What I have learned about the improvements I need to make to improve the values alignment of my organization/team: