PGI **Diagnostic**

Performance Gap Indicator - Initial Analysis

Report For: **Sample Report**

Start Date: **03/15/2018**

End Date: **03/15/2018**

Participants: **12**

PGI Report Contents

Company Name Here - 1-206-400-6647 - Support@Assessments.ws

Performance Gap Indicator Method

The Performance Gap Indicator identifies the GAPS of the Non-Financial Key Performance Indicators utilizing the **IDEAL RESPONSE** scoring method. Statements are presented across three scales for participants to respond with their level of agreement.

- How **TRUE** are the following statements about your organization today?
- How **IMPORTANT** are the following statements for your organization's overall success?
- How **EFFECTIVE** is your organization regarding the following statements?

The Ideal Response method focuses on the desired, positive statement responses of **Extremely** or **Very** across the respective scales.

Several **Control Questions**, designed with inverse ideal responses, have been included to ensure accurate results.

All Ideal Responses are indicated by shaded cells on your Statement by Statement Report.

True Scale	Important Scale	Effective Scale
1. Extremely True	**1. Extremely Important**	**1. Extremely Effective**
2. Very True	**2. Very Important**	**2. Very Effective**
3. Somewhat True	3. Somewhat Important	3. Somewhat Effective
4. Not Very True	4. Not Very Important	4. Not Very Effective
5. Never True	5. Never Important	5. Never Effective
6. I don't know	6. I don't know	6. I don't know

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Executive Summary

NON-FINANCIAL KPI IDEAL RESPONSE GAPS

CULTURE	OPERATIONS	LEADERSHIP	TRAINING	SERVICE
GAP 19%	GAP 37%	GAP 23%	GAP 29%	GAP 24%
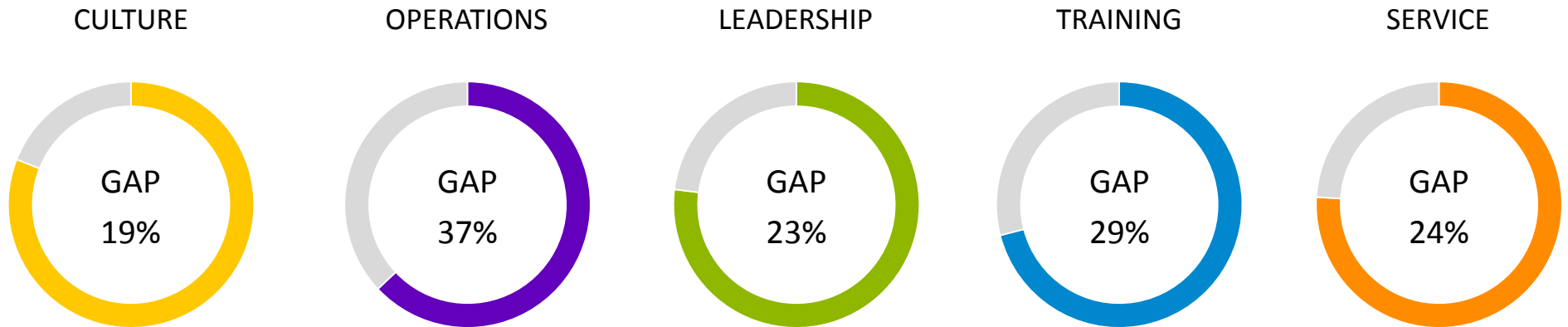
TOP 3 PERFORMANCE STRENGTHS

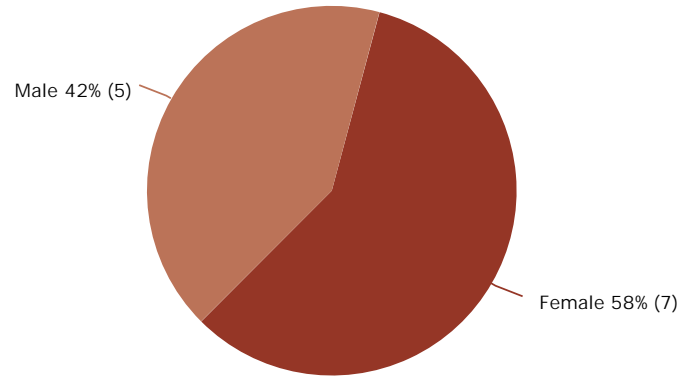| IDEAL RESP.	STATEMENT	SCALE	NF-KPI	PRIORITY
100%	15. The work I do impacts the customer/client experience.	True	Culture	H M L
92%	5. We have clearly defined customer/client satisfaction goals.	True	Service	H M L
92%	7. When someone says they will do something, you can count on it happening.	True	Culture	H M L

TOP 3 PERFORMANCE CONCERNS

IDEAL RESP.	STATEMENT	SCALE	NF-KPI	PRIORITY
42%	34. Ongoing training to enhance service skills.	Effective	Training	H M L
42%	39. Receiving frequent feedback on a regular basis.	Effective	Leadership	H M L
50%	8. At work, my opinions seem to count.	True	Culture	H M L

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PERFORMANCE GAP INDICATOR
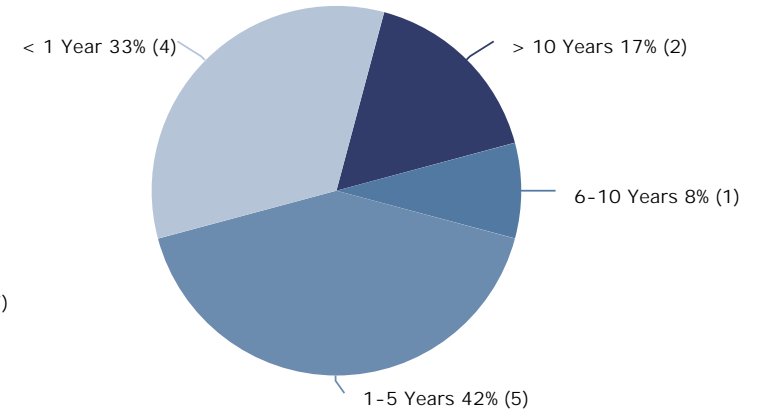
DEMOGRAPHIC SUMMARY

1. Gender
   - Male
   - Female
   - Other

2. Tenure
   - Less than 1 Year
   - 1-5 Years
   - 6-10 Years
   - Greater than 10 Years

3. Level of Customer Interaction
   - Direct
   - Indirect

4. Role
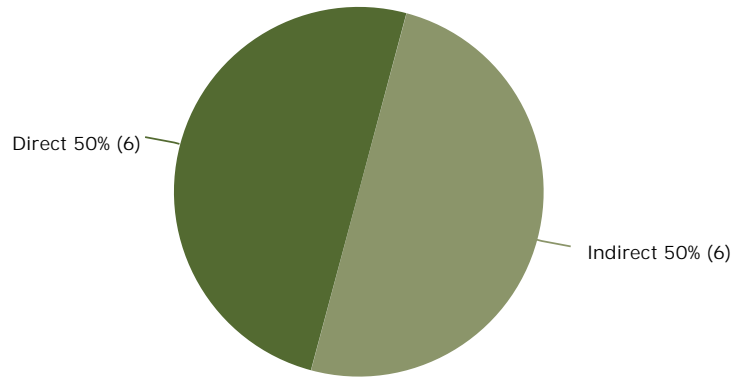   - Management
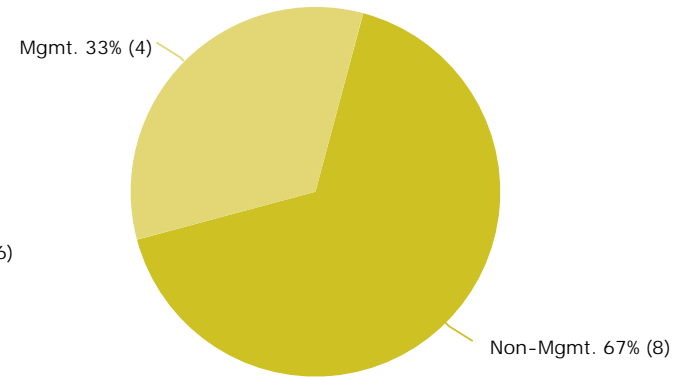   - Non-Management

GENDER

Male 42% (5)

Female 58% (7)

TENURE

< 1 Year 33% (4)

> 10 Years 17% (2)

6-10 Years 8% (1)

1-5 Years 42% (5)

LEVEL OF CUSTOMER INTERACTION

Direct 50% (6)

Indirect 50% (6)

ROLE

Mgmt. 33% (4)

Non-Mgmt. 67% (8)

Total Responses Received: 12

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Non-Financial KPI Ideal Response GAPs

Non-Financial KPIs are leading indicators of business success. Lead indicators are in-process measures and are predictive in nature. A lag indicator (past financial performance) without a lead indicator will give no indication as to how a result will be achieved and provide no early warnings about tracking towards a strategic goal. Conversely, a lead indicator without a lag indicator may make you feel good about keeping busy with a lot of activities but it will not provide confirmation that a business result has been achieved. There is a cause and effect relationship between lead and lag indicators, both are important when selecting measures to track toward your business goals.

Berkana's Performance Indicator's measurement of NF-KPIs provides unique insight enabling

- Leaders to measure the consequences of their actions. Periodic NF-KPI evaluation allows for leaders to strategically apply behavior modification. Monitor, adjust and improve their leadership with laser precision.
- Success for long-term organizational strategies by presenting indirect, leading indicators of a business's assets. NF-KPI's, as leading indicators, add a predictive quality for future financial performance. Financial, or lagging indicators may not capture long-term benefits from current decisions.

Your NF-KPI results represent the percentage of Ideal Responses across the 5 NF-KPIs. Percentages represent the combined Ideal Responses in the True, Important, and Effective Scales.
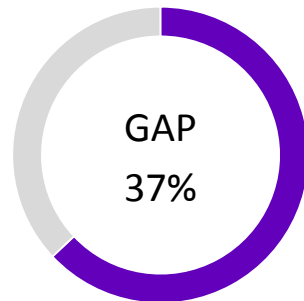
NON-FINANCIAL KPIs
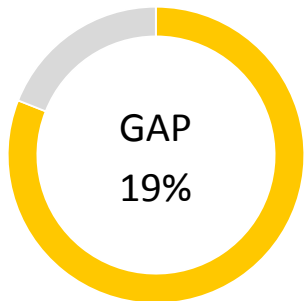
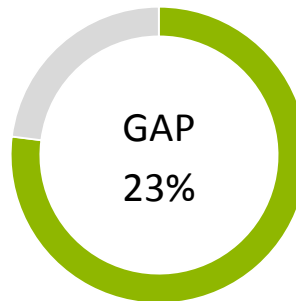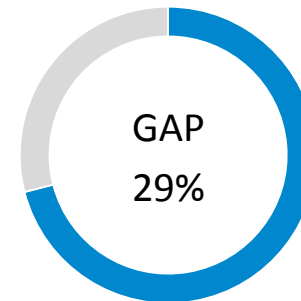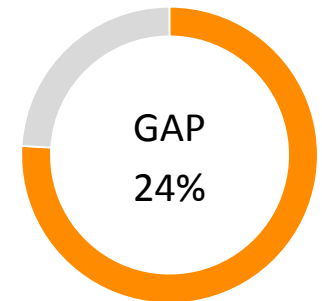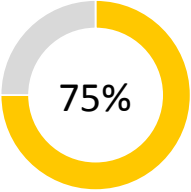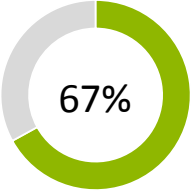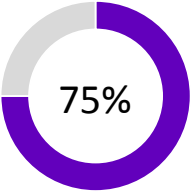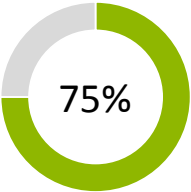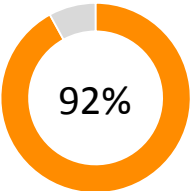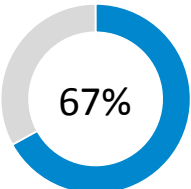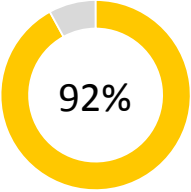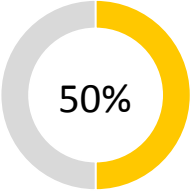| CULTURE	OPERATIONS	LEADERSHIP	TRAINING	SERVICE
GAP 19%	GAP 37%	GAP 23%	GAP 29%	GAP 24%
The written and unwritten set of values, beliefs, and behaviors which determine how your company's employees interact with one another, with customers, and your vendors.	The process, systems, and procedures required to consistently conduct your business at the highest levels of efficiency and effectiveness.	The direction, clarity, and accountability which inspires and empowers others to reach the vision.	The process of providing leaders and teams the tools, time and guidance to master their responsibilities based upon your company's stated performance standards.	The ability to consistently exceed customer expectations which generates increased repeat and referral business by providing exceptional service.

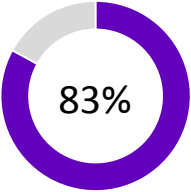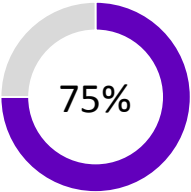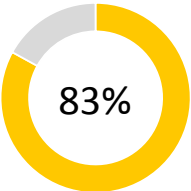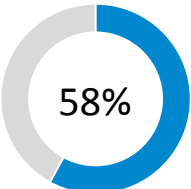Company Name Here - 1-206-400-6647 - Support@Assessments.ws

Statement by Statement - True Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
75% — 1. We operate by the values of the company/organization	17%	58%	17%	0%	0%	8%	Culture
67% — 2. We hold one another accountable for our results	17%	50%	33%	0%	0%	0%	Leadership
75% — 3. We are encouraged to find opportunities for improvement	8%	67%	25%	0%	0%	0%	Operations
75% — 4. Reoccuring issues often go unresolved	0%	0%	25%	58%	17%	0%	Leadership
92% — 5. We have clearly defined customer/client satisfaction goals	8%	83%	8%	0%	0%	0%	Service
67% — 6. I know precisely what I can and cannot do to resolve a customer/client complaint	8%	58%	8%	17%	0%	8%	Training
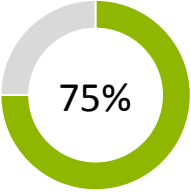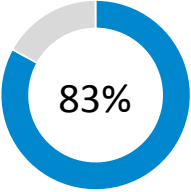
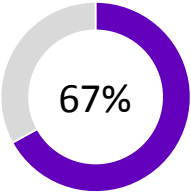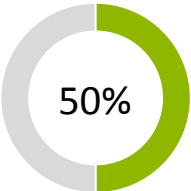Company Name Here - 1-206-400-6647 - Support@Assessments.ws

Statement by Statement -True Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
92%	7. When someone says they will do something, you can count on it happening
	17%	75%	8%	0%	0%	0%	Culture
50%	8. At work, my opinions seem to count
	0%	50%	42%	8%	0%	0%	Culture
83%	9. Company/Organization communications are often unclear
	8%	0%	8%	67%	17%	0%	Operations
75%	10. We have a procedure for listening and responding to customer/client feedback
	17%	58%	25%	0%	0%	0%	Operations
83%	11. My company respects people's differences.
	8%	75%	8%	0%	8%	0%	Culture
58%	12. Training is linked to achieving important company/organization results
	25%	33%	17%	17%	0%	8%	Training

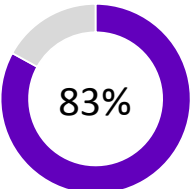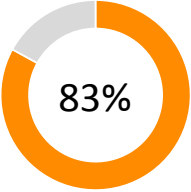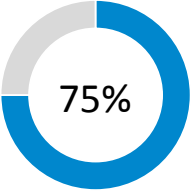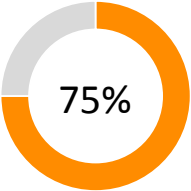Company Name Here - 1-206-400-6647 - Support@Assessments.ws

Statement by Statement - True Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
75% 13. We have clear expectations about performance	25%	50%	25%	0%	0%	0%	Leadership
83% 14. We know the financial value of a satisfied customer/client	25%	58%	17%	0%	0%	0%	Training
100% 15. The work I do impacts the customer/client experience	33%	67%	0%	0%	0%	0%	Culture
67% 16. Management would be surprised to learn what it takes to get the job done due to our processes	8%	8%	0%	8%	58%	17%	Operations
50% 17. Leadership provides the direction I need to excel at my job	25%	25%	33%	17%	0%	0%	Leadership
83% 18. We have clear process flows for important procedures	17%	67%	8%	8%	0%	0%	Operations

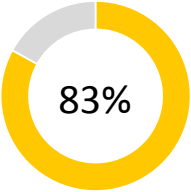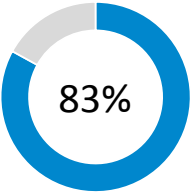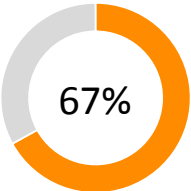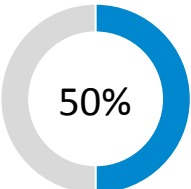Company Name Here - 1-206-400-6647 - Support@Assessments.ws
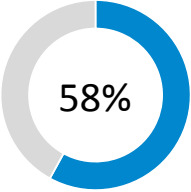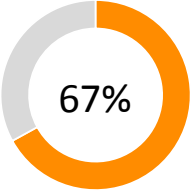
Statement by Statement - True Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
83%							
19. Our actions equal our words when it comes to customer/client satisfaction							
	17%	67%	8%	0%	8%	0%	Service
75%							
20. We are trained to deliver customer/client service at a high standard							
	33%	42%	17%	8%	0%	0%	Training
75%							
21. We have a clear definition of what 'exceptional' service means in our company/organization							
	33%	42%	17%	8%	0%	0%	Service
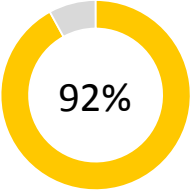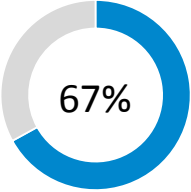
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Statement by Statement - Important Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
58%	22. Ongoing training to enhance service skills						
	8%	50%	17%	17%	0%	8%	Training
67%	23. Developing new, innovative strategies for serving customers/clients						
	17%	50%	8%	17%	0%	8%	Service
83%	24. Our work is guided by the values of the company/organization						
	17%	67%	17%	0%	0%	0%	Culture
83%	25. Knowing what the customer/client wants and expects						
	17%	67%	17%	0%	0%	0%	Training
67%	26. Taking individual initiative to identify and exceed customer/client needs						
	17%	50%	17%	8%	0%	8%	Service
50%	27. Receiving frequent feedback on a regular basis						
	8%	42%	33%	8%	0%	8%	Training

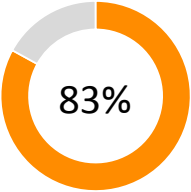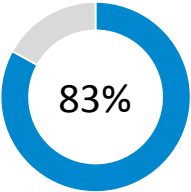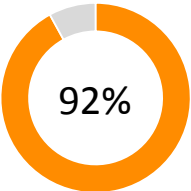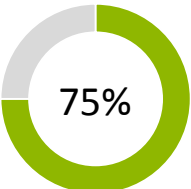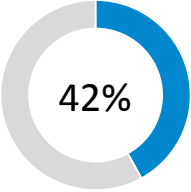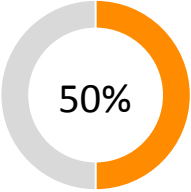Company Name Here - 1-206-400-6647 - Support@Assessments.ws

Statement by Statement - Important Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
92%							
28. Doing the job right the first time							
	8%	83%	8%	0%	0%	0%	Culture
67%							
29. Product/service and industry knowledge							
	8%	58%	17%	0%	8%	8%	Training
83%							
30. Managing customer/client impressions of our company/organization							
	17%	67%	8%	8%	0%	0%	Service
83%							
31. Dealing effectively with customer/client complaints							
	17%	67%	17%	0%	0%	0%	Training
92%							
32. Listening to customer/client wants and needs							
	33%	58%	8%	0%	0%	0%	Service
75%							
33. Leadership holds everyone accountable to high standards							
	8%	67%	17%	0%	0%	8%	Leadership
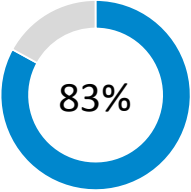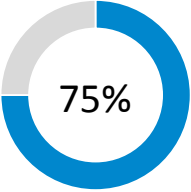
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Statement by Statement - Effective Scale

Statement ideal responses are shaded darker grey.

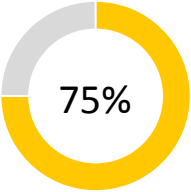| Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
42%	34. Ongoing training to enhance service skills						
	8%	33%	33%	8%	0%	17%	Training
50%	35. Developing new, innovative strategies for serving customers/clients						
	8%	42%	25%	17%	0%	8%	Service
75%	36. Our work is guided by the values of the company/organization						
	8%	67%	25%	0%	0%	0%	Culture
92%	37. Knowing what the customer/client wants and expects						
	8%	83%	8%	0%	0%	0%	Training
58%	38. Taking individual initiative to identify and exceed customer/client needs						
	8%	50%	25%	8%	0%	8%	Service
42%	39. Receiving frequent feedback on a regular basis						
	0%	42%	42%	8%	0%	8%	Leadership

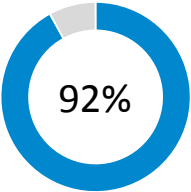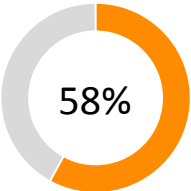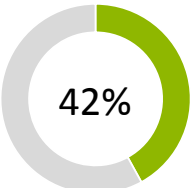Company Name Here - 1-206-400-6647 - Support@Assessments.ws

Statement by Statement - Effective Scale

Statement ideal responses are shaded darker grey.

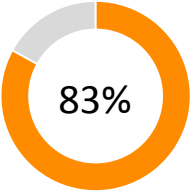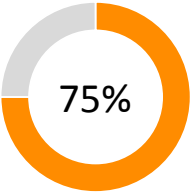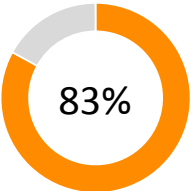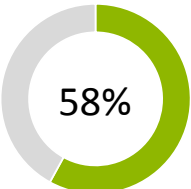| Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
83% — 40. Doing the job right the first time	0%	83%	17%	0%	0%	0%	Training
75% — 41. Product/service and industry knowledge	0%	75%	8%	8%	0%	8%	Training
83% — 42. Managing customer/client impressions of our company/organization	8%	75%	17%	0%	0%	0%	Service
75% — 43. Dealing effectively with customer/client complaints	17%	58%	17%	8%	0%	0%	Service
83% — 44. Listening to customer/client wants and needs	8%	75%	17%	0%	0%	0%	Service
58% — 45. Leadership holds everyone accountable to high standards	0%	58%	42%	0%	0%	0%	Leadership

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CALCULATION SUMMARY

Graph percentages represent the Total Potential score compared to the weighted Important and Effective Scale scores.

Your GAP Score is the difference between your Total Potential and your Effective score.

Chart (top right):

TOTAL POTENTIAL | IMPORTANT | EFFECTIVE
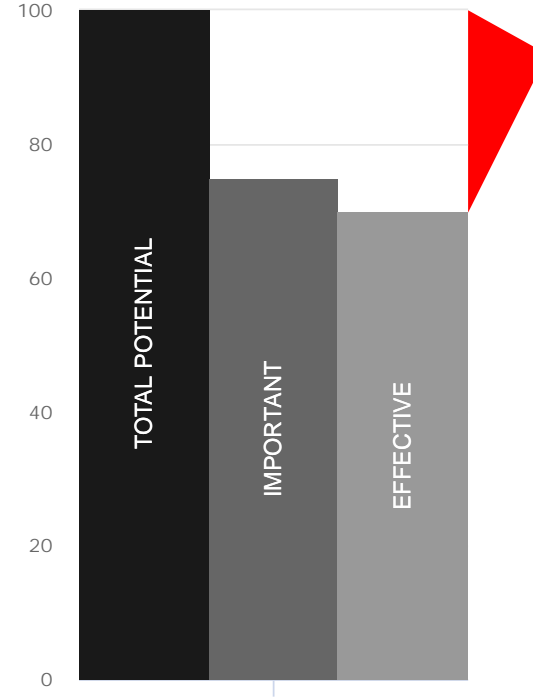
GAP SCORE %

The specific statement asked on the Important and Effective scales.
[Statement Numbers]

Chart 1: 100% | 58% | 42%
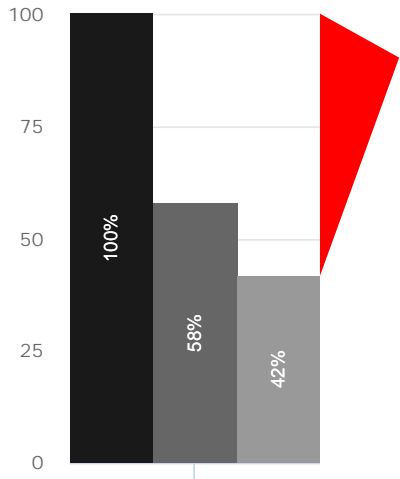
GAP 58%

Ongoing training to enhance service skills
[#22 & #34]

Chart 2: 100% | 67% | 50%
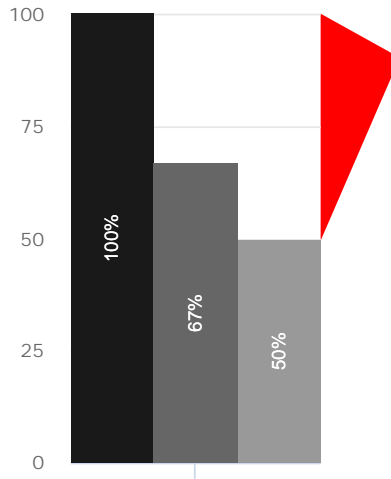
GAP 50%

Developing new, innovative strategies for serving customers
[#23 & #35]

Chart 3: 100% | 83% | 75%
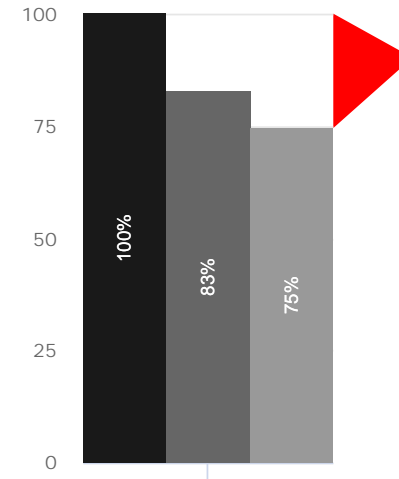
GAP 25%

Our work is guided by the values of the organization
[#24 & #36]

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GAP Scores
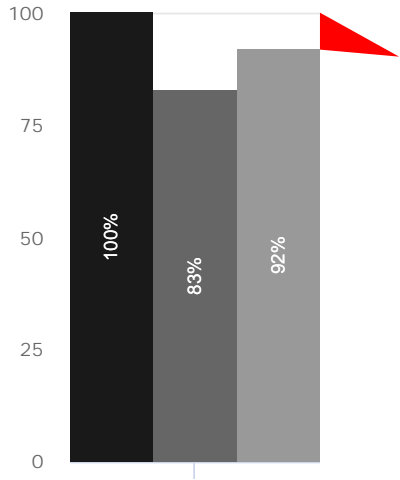
GAP 8%

Knowing what the customer wants and expects
[#25 & #37]

Total Potential: 100%
Important: 83%
Effective: 92%
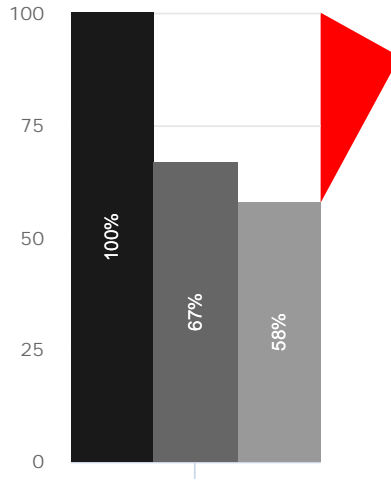
GAP 42%

Taking individual initiative to identify and exceed customer needs
[#26 & #38]

Total Potential: 100%
Important: 67%
Effective: 58%
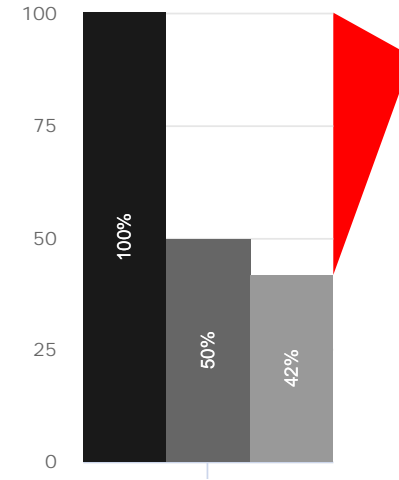
GAP 58%

Receiving frequent feedback on a regular basis
[#27 & #39]

Total Potential: 100%
Important: 50%
Effective: 42%
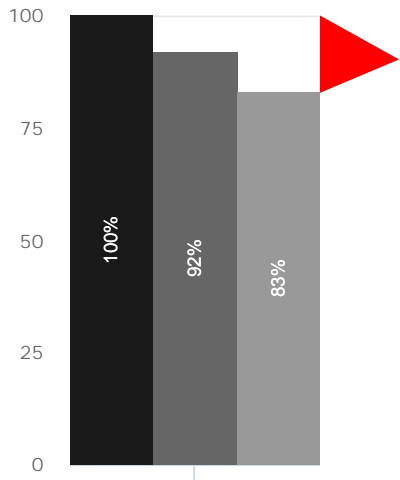
GAP 17%

Doing the job right the first time
[#28 & #40]

Total Potential: 100%
Important: 92%
Effective: 83%
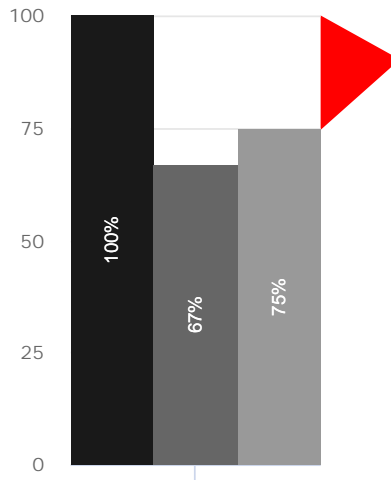
GAP 25%

Product and industry knowledge
[#29 & #41]

Total Potential: 100%
Important: 67%
Effective: 75%
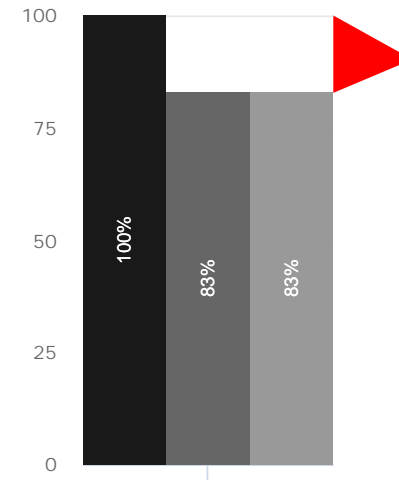
GAP 17%

Managing customer impressions of our company
[#30 & #42]

Total Potential: 100%
Important: 83%
Effective: 83%

Legend: Total Potential | Important | Effective

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GAP Scores

GAP 25%

Dealing effectively with customer complaints [#31 & #43]

- Total Potential: 100%
- Important: 83%
- Effective: 75%
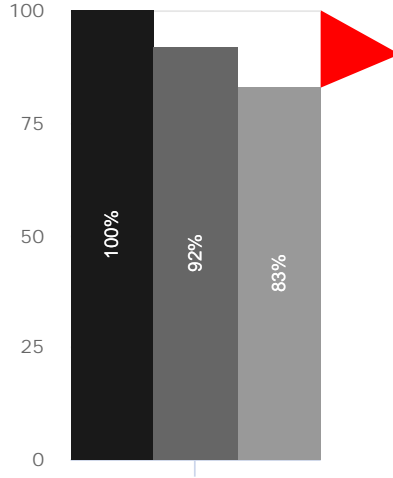
GAP 17%

Listening to customer wants and needs [#32 & #44]

- Total Potential: 100%
- Important: 92%
- Effective: 83%
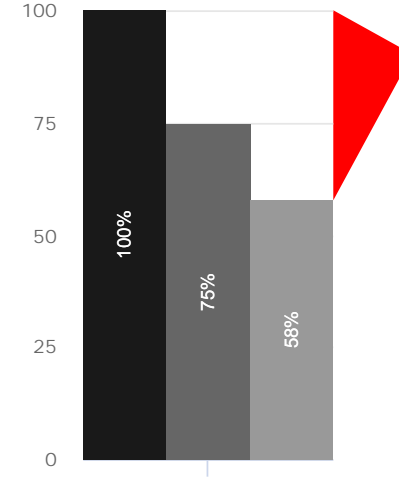
GAP 42%

Leadership holds everyone accountable to high standards [#33 & #45]

- Total Potential: 100%
- Important: 75%
- Effective: 58%

Legend:
- Total Potential
- Important
- Effective

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Ideal Responses by NF-KPI and Gender

CALCULATION SUMMARY

Percentages below represent the Ideal Responses of Non-Financial Key Performance Indicators by Gender.

GENDER

Male 42% (5)

Female 58% (7)

Ideal Responses

	CULTURE	LEADERSHIP	OPERATIONS	SERVICE	TRAINING
Male	65%	46%	64%	55%	49%
Female	93%	76%	86%	90%	86%

● Male ● Female

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PERFORMANCE GAP INDICATOR
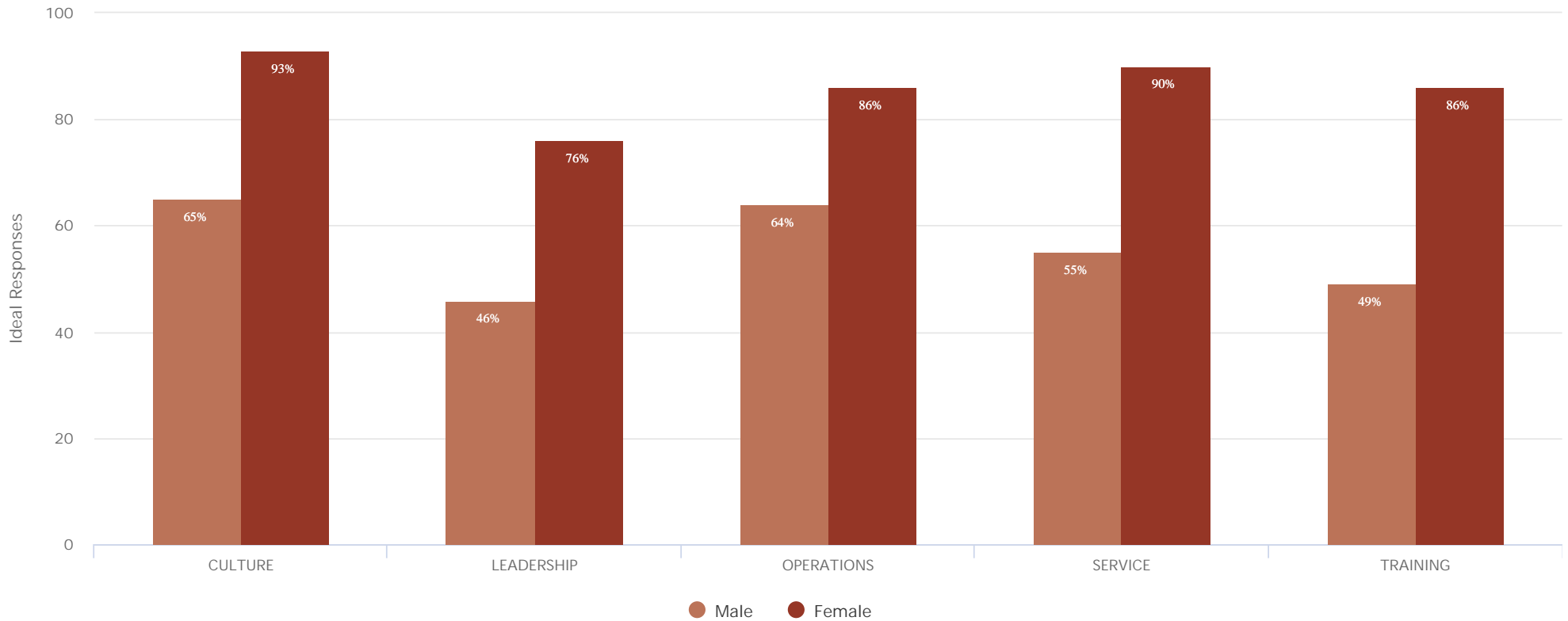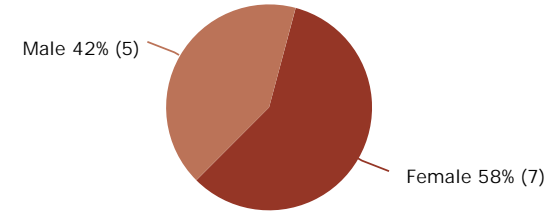
Ideal Responses by NF-KPI and Role

CALCULATION SUMMARY

Percentages below represent the Ideal Responses of Non-Financial Key
Performance Indicators by Role.

ROLE

Mgmt. 33% (4)

Non-Mgmt. 67% (8)

Ideal Responses

	CULTURE	LEADERSHIP	OPERATIONS	SERVICE	TRAINING
Management	84%	75%	85%	77%	73%
Non-Management	80%	57%	72%	75%	69%

● Management   ● Non-Management

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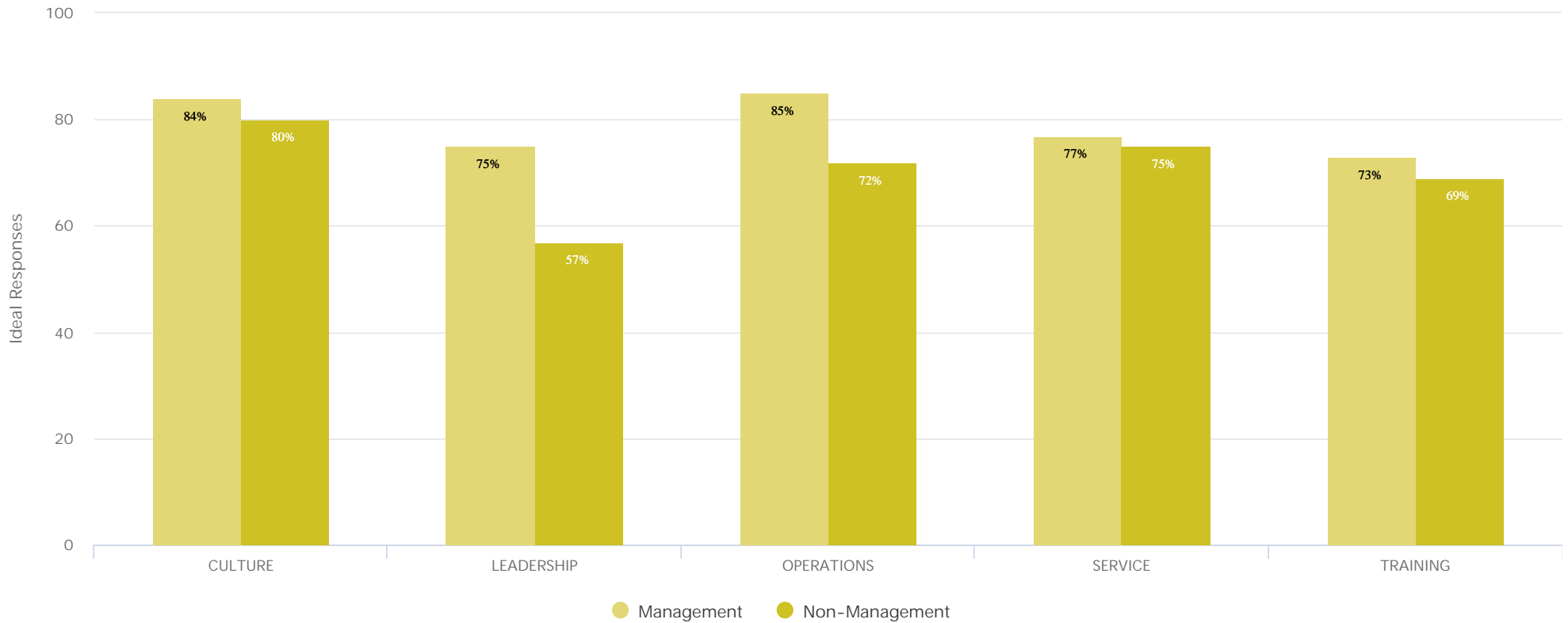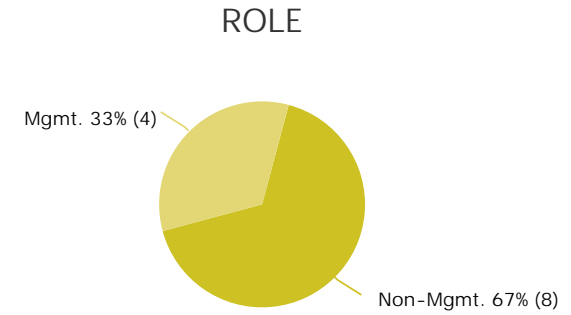
Ideal Responses by NF-KPI and Tenure

CALCULATION SUMMARY

Percentages below represent the Ideal Responses of Non-Financial Key Performance Indicators by Tenure.

TENURE

< 1 Year 33% (4)
> 10 Years 17% (2)
6-10 Years 8% (1)
1-5 Years 42% (5)

Ideal Responses

	CULTURE	LEADERSHIP	OPERATIONS	SERVICE	TRAINING
Less than 1 Year	72%	50%	70%	62%	63%
1-5 Years	80%	69%	72%	77%	68%
6-10 Years	100%	71%	100%	100%	92%
Greater than 10 Years	94%	71%	90%	88%	81%

● Less than 1 Year ● 1-5 Years ● 6-10 Years ● Greater than 10 Years

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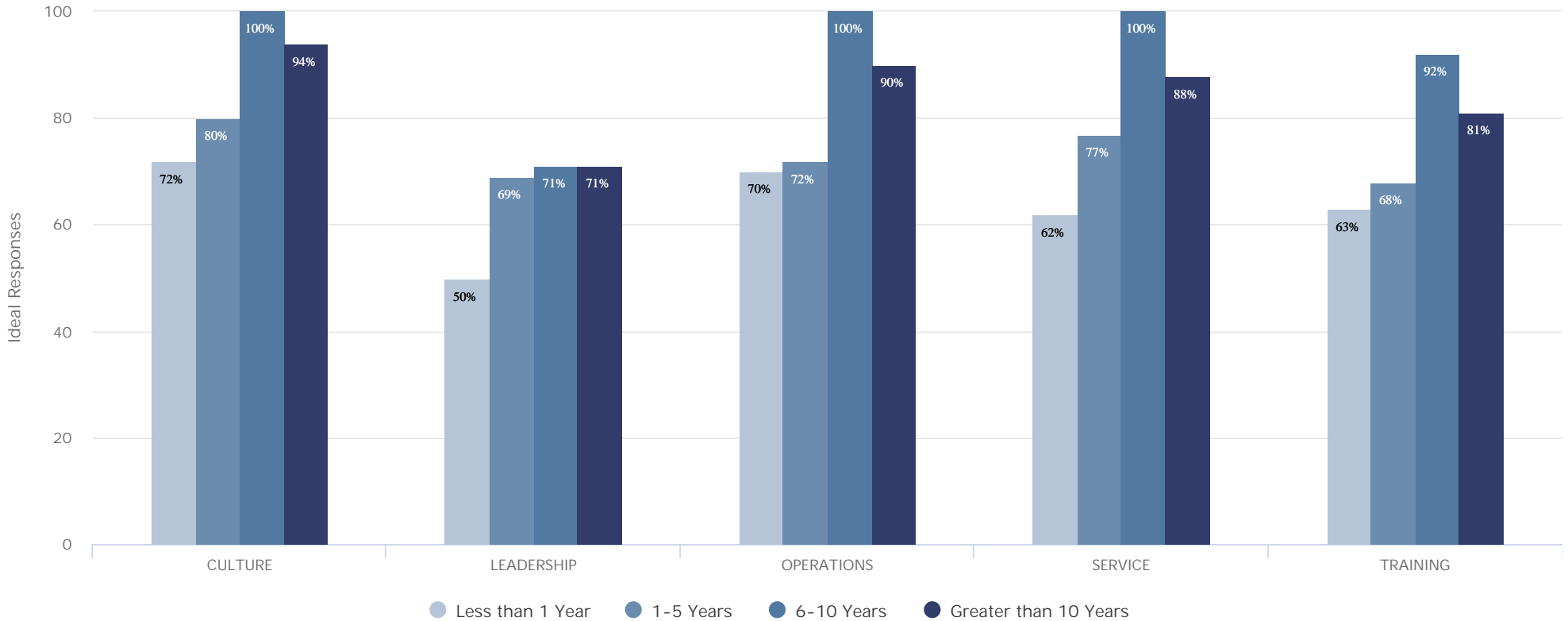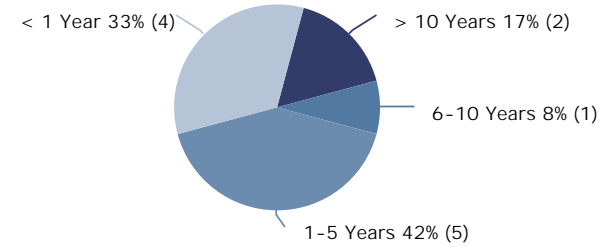
Ideal Responses by NF-KPI and Level of Customer Interaction

PERFORMANCE GAP INDICATOR

CALCULATION SUMMARY

Percentages below represent the Ideal Responses of Non-Financial Key Performance Indicators by Level of Customer Interaction.

LEVEL OF CUSTOMER INTERACTION

Direct 50% (6)

Indirect 50% (6)

Ideal Responses

Category	Direct	Indirect
CULTURE	79%	83%
LEADERSHIP	64%	62%
OPERATIONS	73%	80%
SERVICE	75%	76%
TRAINING	65%	76%

● Direct   ● Indirect

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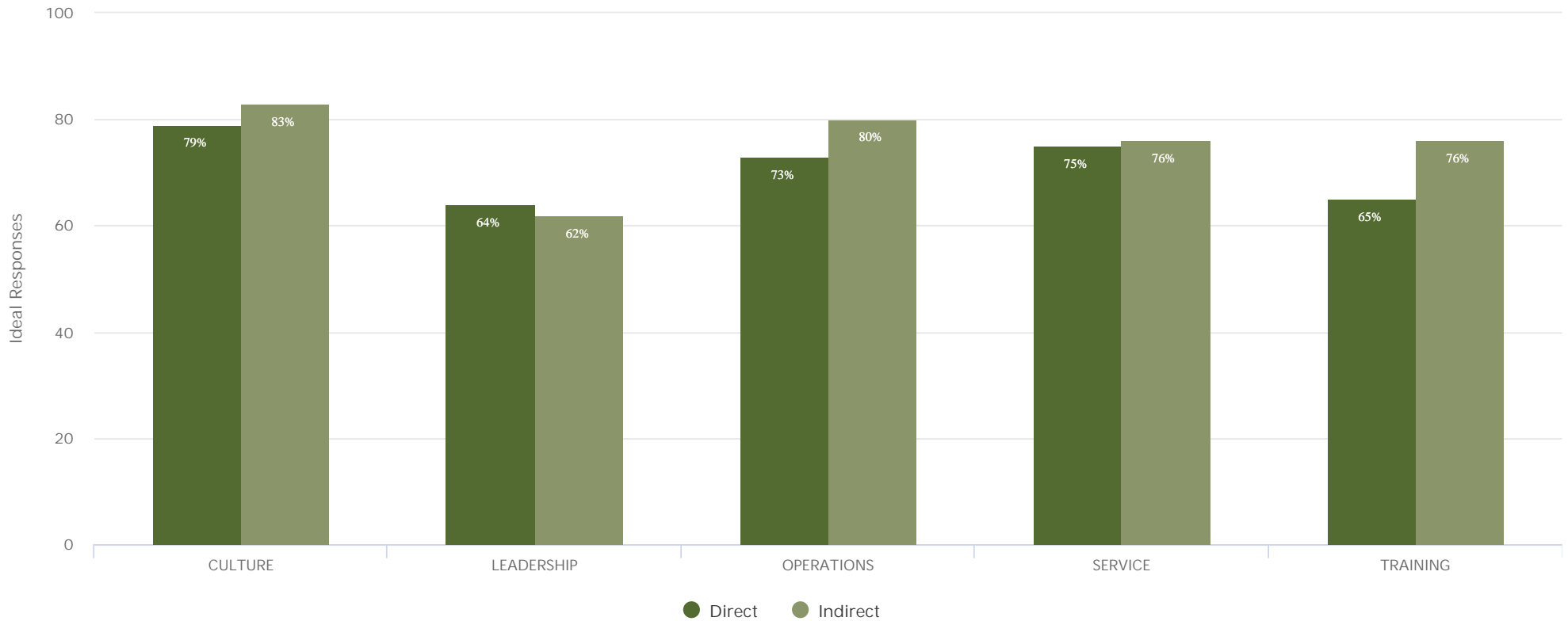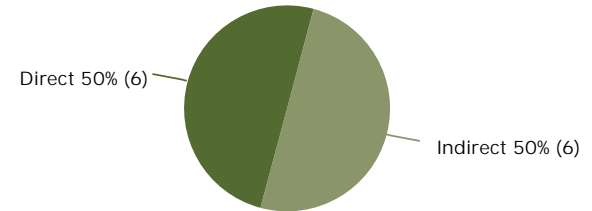
Performance Strengths & Concerns

PERFORMANCE STRENGTHS - Participant ideal response percentages greater than 80%

PERFORMANCE CONCERNS - Participant ideal response percentages less than 50%

Your goal for Performance Strengths is to maintain and support these positive behaviors and beliefs. Conversely, your goal for Performance Concerns is to prioritize your top concerns and determine the appropriate actions to close those gaps.

PERFORMANCE STRENGTHS

IDEAL RESP.	STATEMENT	SCALE	NF-KPI	PRIORITY
100%	15. The work I do impacts the customer/client experience.	True	Culture	H M L
92%	5. We have clearly defined customer/client satisfaction goals.	True	Service	H M L
92%	7. When someone says they will do something, you can count on it happening.	True	Culture	H M L
92%	28. Doing the job right the first time.	Important	Culture	H M L
92%	32. Listening to customer/client wants and needs.	Important	Service	H M L
92%	37. Knowing what the customer/client wants and expects.	Effective	Training	H M L
83%	9. Company/Organization communications are often unclear.	True	Operations	H M L
83%	11. My company respects people's differences..	True	Culture	H M L
83%	14. We know the financial value of a satisfied customer/client.	True	Training	H M L
83%	18. We have clear process flows for important procedures.	True	Operations	H M L
83%	19. Our actions equal our words when it comes to customer/client satisfaction.	True	Service	H M L
83%	24. Our work is guided by the values of the company/organization.	Important	Culture	H M L

PERFORMANCE CONCERNS

IDEAL RESP.	STATEMENT	SCALE	NF-KPI	PRIORITY
42%	34. Ongoing training to enhance service skills.	Effective	Training	H M L
42%	39. Receiving frequent feedback on a regular basis.	Effective	Leadership	H M L
50%	8. At work, my opinions seem to count.	True	Culture	H M L
50%	17. Leadership provides the direction I need to excel at my job.	True	Leadership	H M L
50%	27. Receiving frequent feedback on a regular basis.	Important	Training	H M L
50%	35. Developing new, innovative strategies for serving customers/clients.	Effective	Service	H M L

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Performance Strengths & Concerns

PERFORMANCE STRENGTHS

IDEAL RESP.	STATEMENT	SCALE	NF-KPI	PRIORITY
83%	25. Knowing what the customer/client wants and expects.	Important	Training	H M L
83%	30. Managing customer/client impressions of our company/organization.	Important	Service	H M L
83%	31. Dealing effectively with customer/client complaints.	Important	Training	H M L
83%	40. Doing the job right the first time.	Effective	Training	H M L
83%	42. Managing customer/client impressions of our company/organization.	Effective	Service	H M L
83%	44. Listening to customer/client wants and needs.	Effective	Service	H M L

PERFORMANCE CONCERNS

IDEAL RESP.	STATEMENT	SCALE	NF-KPI	PRIORITY
No Performance Concerns				

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