



# PGI Diagnostic

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## Performance Gap Indicator - Initial Analysis

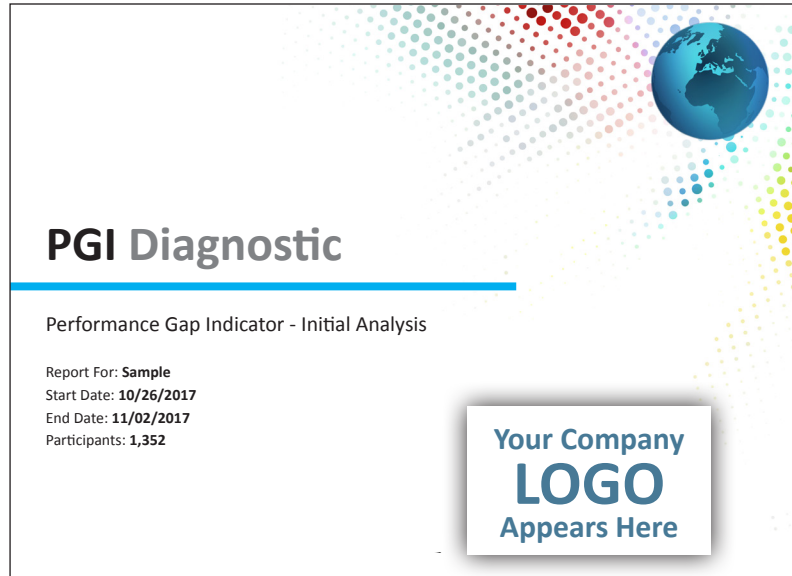
Report For: **Sample**

Start Date: **10/26/2017**

End Date: **11/02/2017**

Participants: **1,352**

Your Company  
**LOGO**  
Appears Here

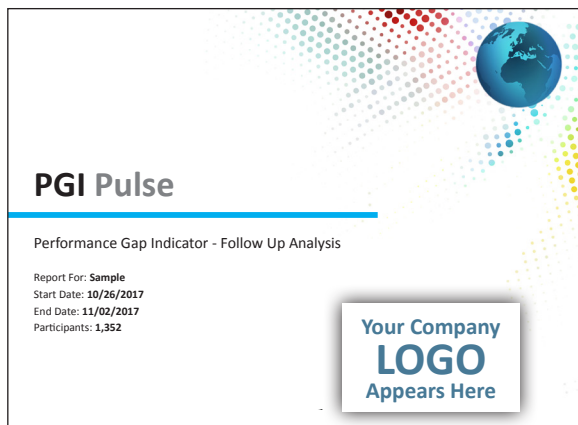


## PGI Diagnostic

The PGI Diagnostic report is an essential first step for any consultant's discovery process. It is your foot in the door for new consulting business.

Provide your clients with performance analysis using anonymous feedback from your client's employees. Identify company-wide performance gaps ensuring subsequent coaching and training investments are administered with laser-guided accuracy that provides demonstrable results.

The diagnostic report establishes a benchmark for performance improvements.



## PGI Pulse

The PGI Pulse report is your periodic company-wide assessment to measure and track ongoing performance.

Ideally, the PGI Pulse is implemented within an organization at regular intervals, be it quarterly, annually, or as needed.

Reissue the Pulse after implementing a performance improvement solution as the ideal ROI assurance tool. Provide your clients with quantified evidence of your impact.

# PGI Report Contents

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Performance Gap Indicator Method	p. 3
Executive Summary	p. 4
Demographics	p. 5
Non-Financial KPI Ideal Response GAPS	p. 6
Statement by Statement	p. 7-14
True Scale	p. 7
Important Scale	p. 11
Effective Scale	p. 13
GAP Scores	p. 15-17
Ideal Responses by Non-Financial KPI and Demographic	p. 18-21
Gender	p. 18
Position	p. 19
Tenure	p. 20
Level of Customer Engagement	p. 21
Performance Strengths & Concerns	p. 22



# 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 focusses 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

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

## Important Scale

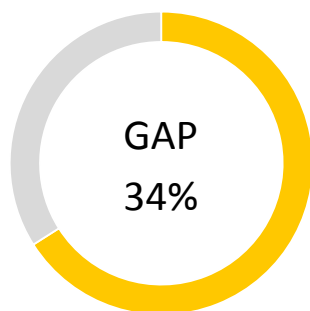
1. **Extremely Important**
2. **Very Important**
3. Somewhat Important
4. Not Very Important
5. Never Important
6. I don't know

## Effective Scale

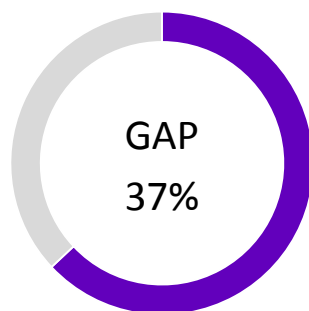
1. **Extremely Effective**
2. **Very Effective**
3. Somewhat Effective
4. Not Very Effective
5. Never Effective
6. I don't know

## NON-FINANCIAL KPI IDEAL RESPONSE GAPS

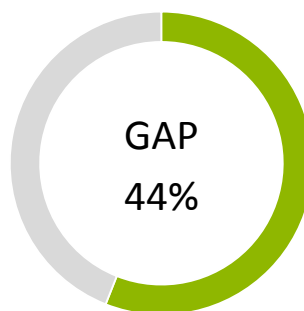
### CULTURE



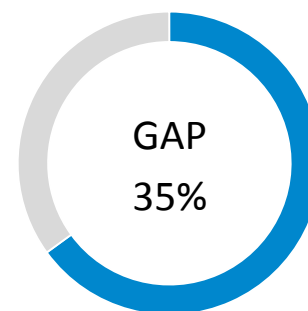
### OPERATIONS



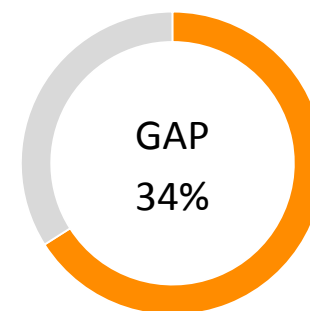
### LEADERSHIP



### TRAINING



### SERVICE



## TOP 3 PERFORMANCE STRENGTHS

IDEAL RESP.	STATEMENT	SCALE	NF-KPI	PRIORITY
81%	5. We have clearly defined customer satisfaction goals.	True	Service	H M L
81%	20. We are trained to deliver customer service at a high standard.	True	Training	H M L

## TOP 3 PERFORMANCE CONCERNS

IDEAL RESP.	STATEMENT	SCALE	NF-KPI	PRIORITY
23%	11. Most upset customers will tell us their complaints.	True	Service	H M L
27%	16. Management would be surprised to learn what it takes to get the job done due to our processes.	True	Operations	H M L
38%	9. Company communications are often unclear.	True	Operations	H M L

# Demographics

## DEMOGRAPHIC SUMMARY

### 1. Gender

- Male
- Female
- Other

### 2. Tenure

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

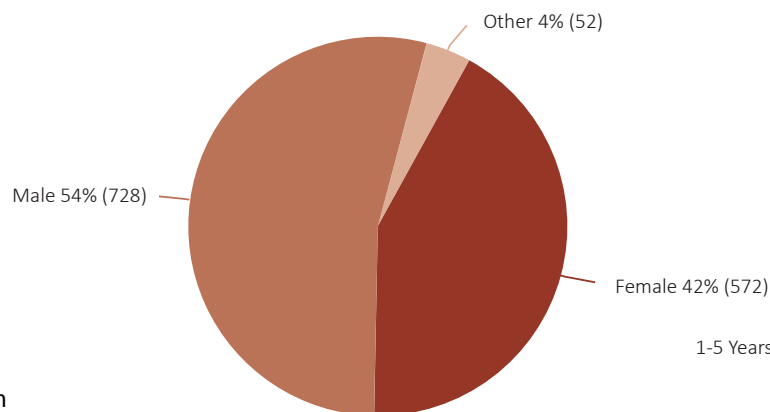
### 3. Level of Customer Interaction

- Direct
- Indirect

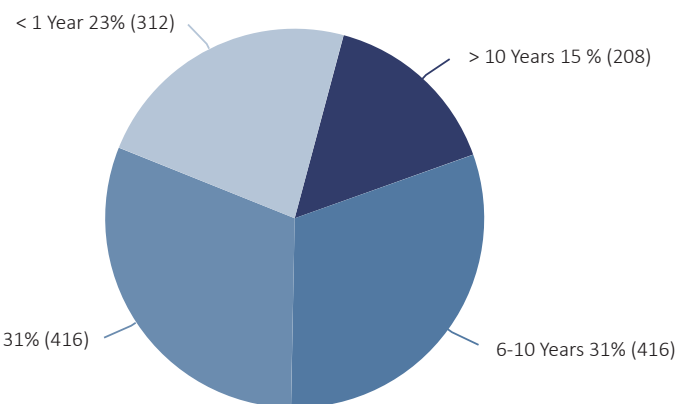
### 4. Role

- Management
- Non-Management

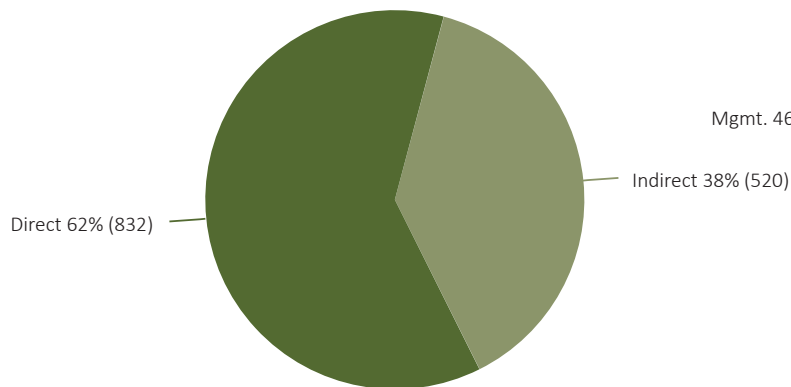
## GENDER



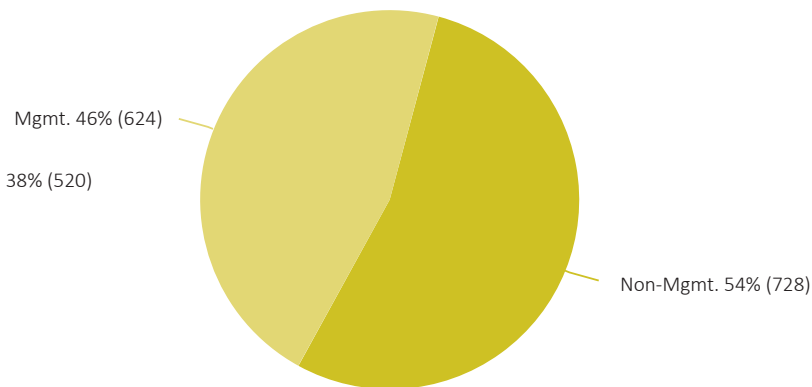
## TENURE



## LEVEL OF CUSTOMER INTERACTION



## ROLE



Total Responses Received: 1,352

## 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.

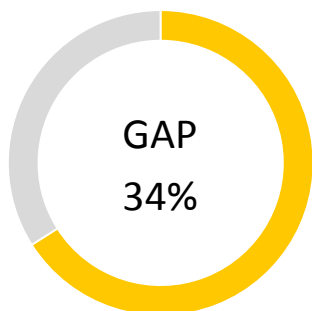
Berkana's Performance Indicator's measurement of NF-KPIs provides unique insight enabling

- 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.

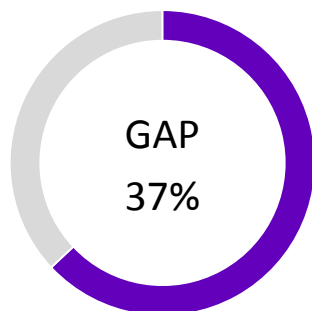
### NON-FINANCIAL KPIs

#### CULTURE



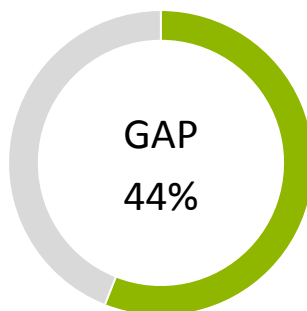
The written and unwritten set of values, beliefs, and behaviors which determine how your company's employees interact with one another, with customers, and your vendors.

#### OPERATIONS



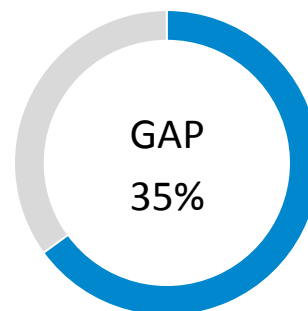
The process, systems, and procedures required to consistently conduct your business at the highest levels of efficiency and effectiveness.

#### LEADERSHIP



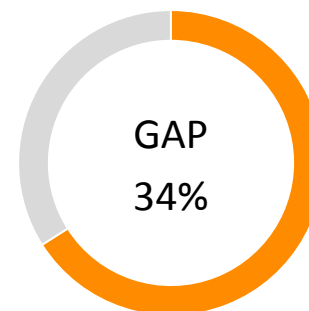
The direction, clarity, and accountability which inspires and empowers others to reach the vision.

#### TRAINING



The process of providing leaders and teams the tools, time and guidance to master their responsibilities based upon your company's stated performance standards.

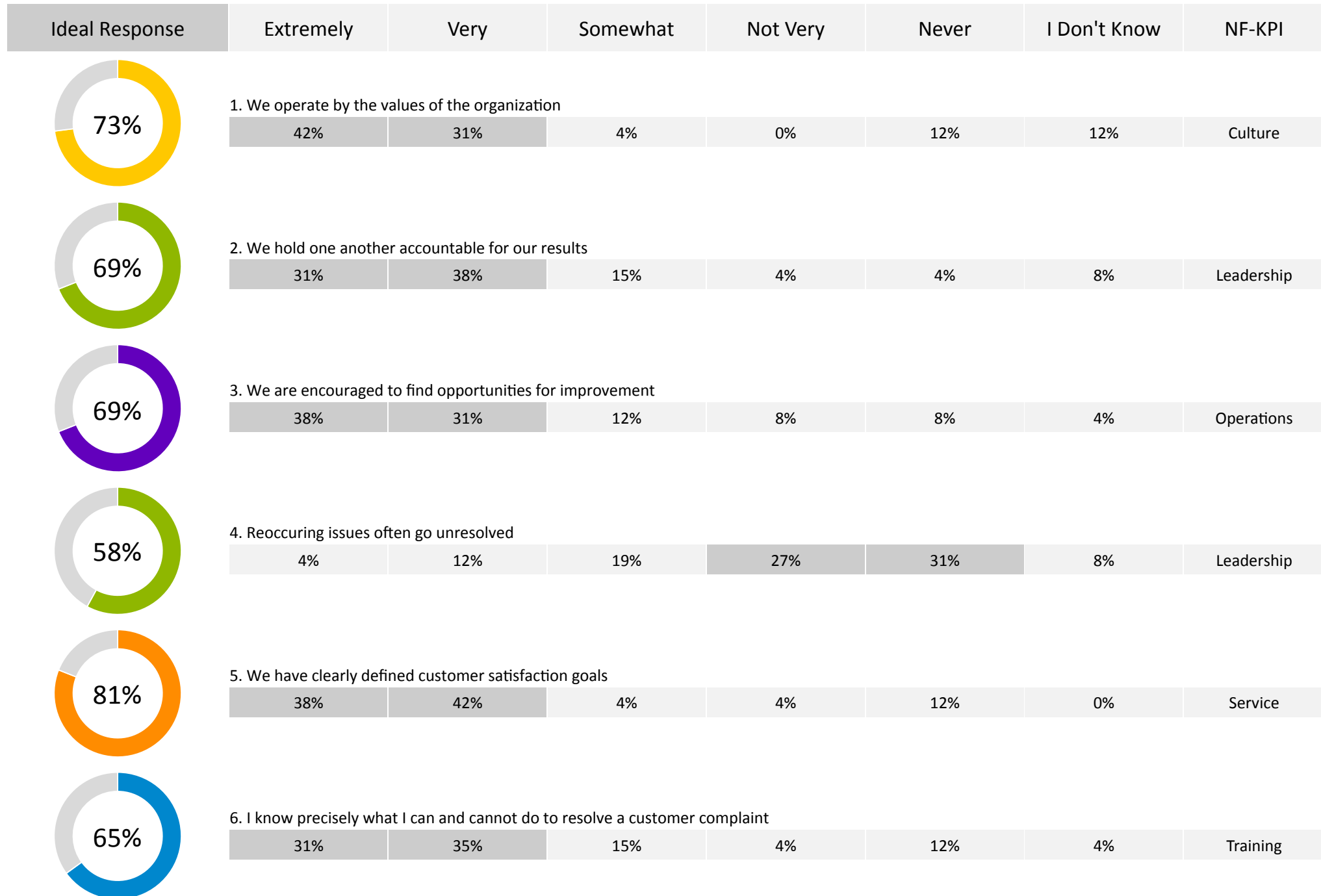
#### SERVICE



The ability to consistently exceed customer expectations which generates increased repeat and referral business by providing exceptional service.

# Statement by Statement - True Scale

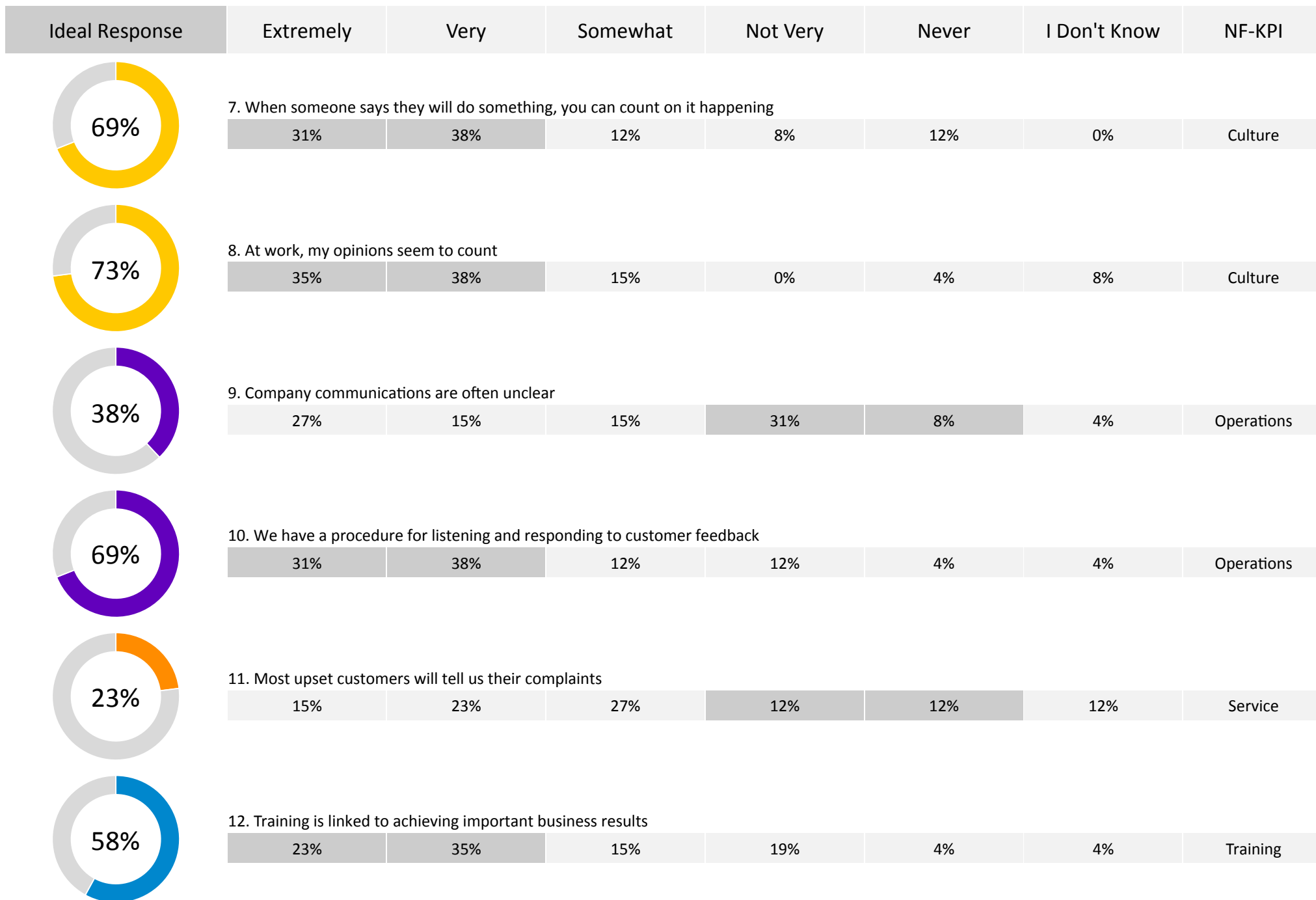
Statement ideal responses are shaded darker grey.





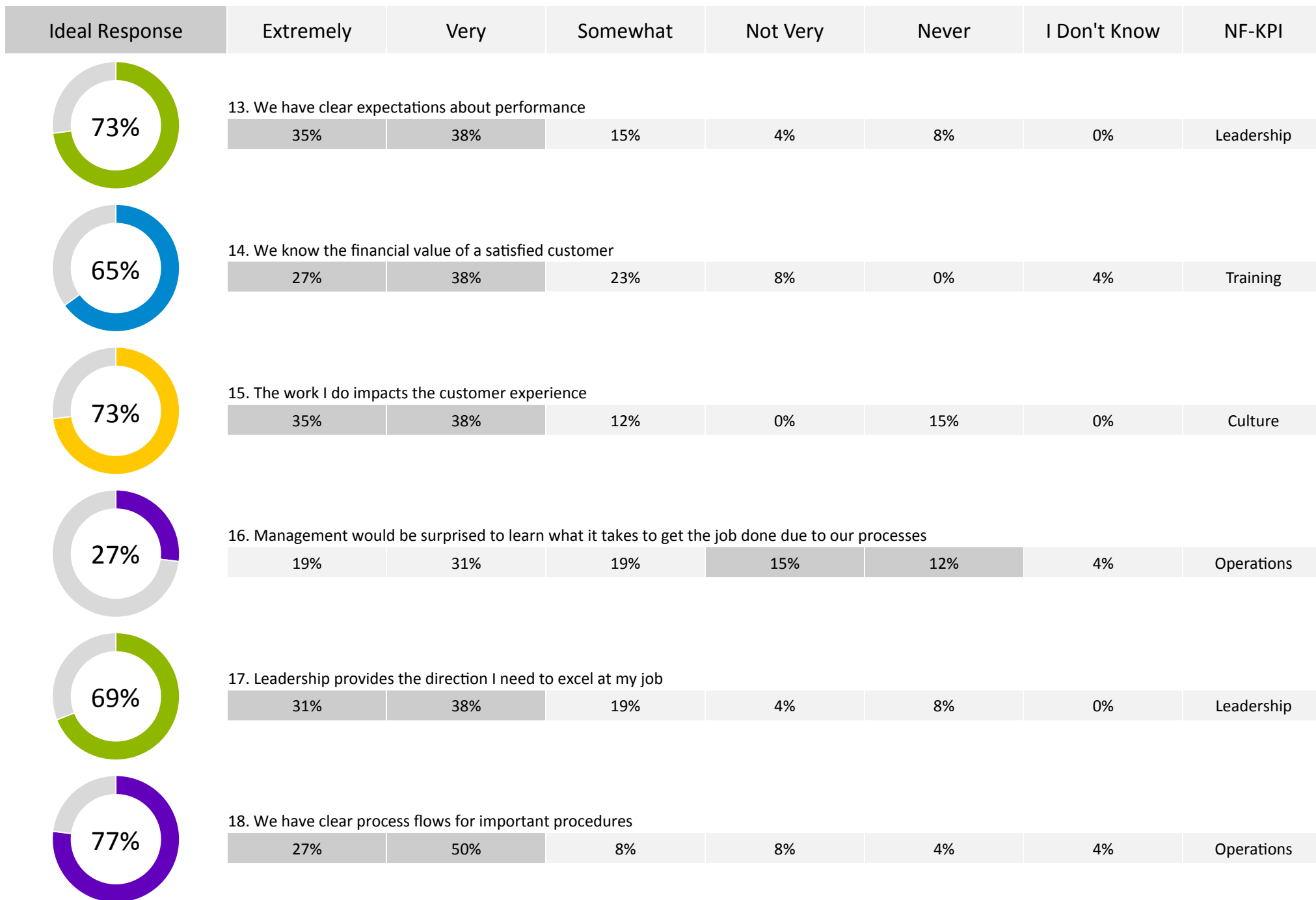
## Statement by Statement -True Scale

Statement ideal responses are shaded darker grey.



## Statement by Statement - True Scale

Statement ideal responses are shaded darker grey.



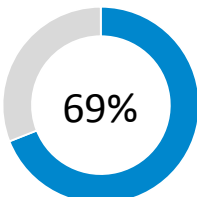
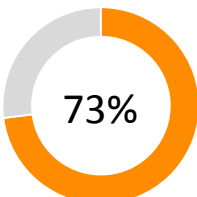
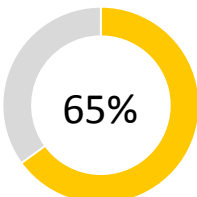
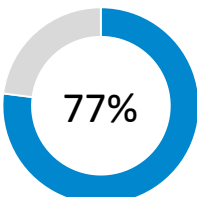
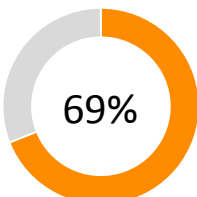
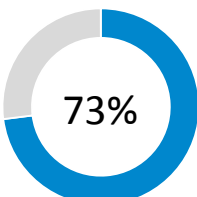
## Statement by Statement - True Scale

Statement ideal responses are shaded darker grey.



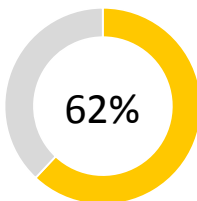
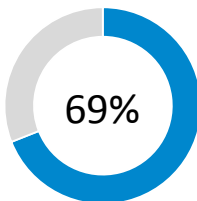
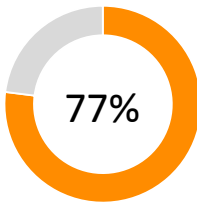
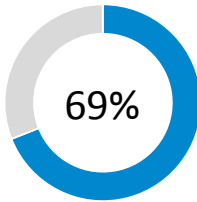
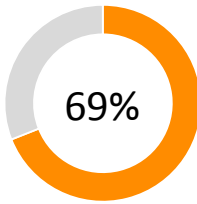
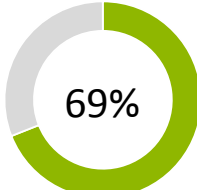
## Statement by Statement - Important Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
	22. Ongoing training to enhance service skills						
	38%	31%	8%	15%	8%	0%	Training
	23. Developing new, innovative strategies for serving customers						
	38%	35%	19%	4%	4%	0%	Service
	24. Our work is guided by the values of the organization						
	38%	27%	19%	8%	8%	0%	Culture
	25. Knowing what the customer wants and expects						
	38%	38%	8%	8%	8%	0%	Training
	26. Taking individual initiative to identify and exceed customer needs						
	38%	31%	19%	4%	8%	0%	Service
	27. Receiving frequent feedback on a regular basis						
	35%	38%	12%	8%	8%	0%	Training

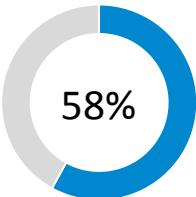
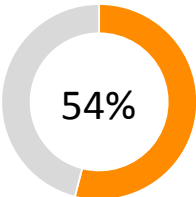
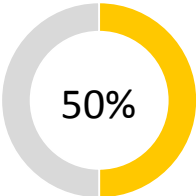
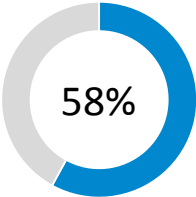
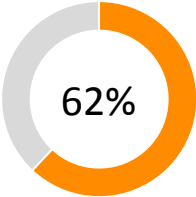

## Statement by Statement - Important Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
	28. Doing the job right the first time						
	31%	31%	12%	19%	4%	4%	Culture
	29. Product and industry knowledge						
	35%	35%	19%	4%	4%	4%	Training
	30. Managing customer impressions of our organization						
	35%	42%	8%	12%	0%	4%	Service
	31. Dealing effectively with customer complaints						
	35%	35%	15%	12%	4%	0%	Training
	32. Listening to customer wants and needs						
	35%	35%	8%	15%	8%	0%	Service
	33. Leadership holds everyone accountable to high standards						
	35%	35%	19%	8%	4%	0%	Leadership

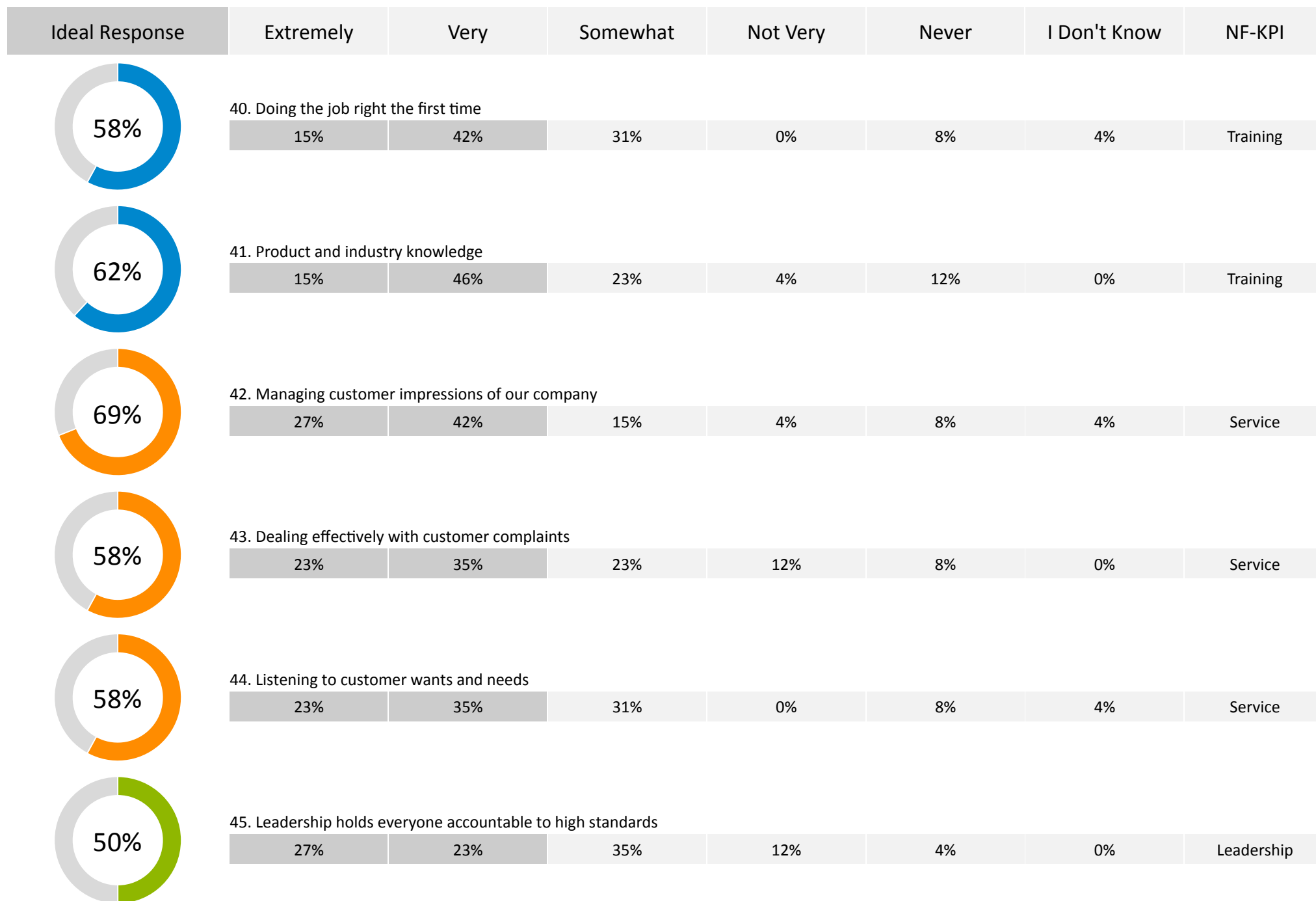
## Statement by Statement - Effective Scale

Statement ideal responses are shaded darker grey.

Ideal Response	Extremely	Very	Somewhat	Not Very	Never	I Don't Know	NF-KPI
	34. Ongoing training to enhance service skills						
	23%	35%	19%	15%	4%	4%	Training
	35. Developing new, innovative strategies for serving customers						
	35%	19%	23%	4%	8%	12%	Service
	36. Our work is guided by the values of the organization						
	31%	19%	27%	8%	8%	8%	Culture
	37. Knowing what the customer wants and expects						
	35%	23%	23%	8%	4%	8%	Training
	38. Taking individual initiative to identify and exceed customer needs						
	19%	42%	27%	0%	0%	12%	Service
	39. Receiving frequent feedback on a regular basis						
	19%	31%	27%	12%	4%	8%	Leadership

## Statement by Statement - Effective Scale

Statement ideal responses are shaded darker grey.

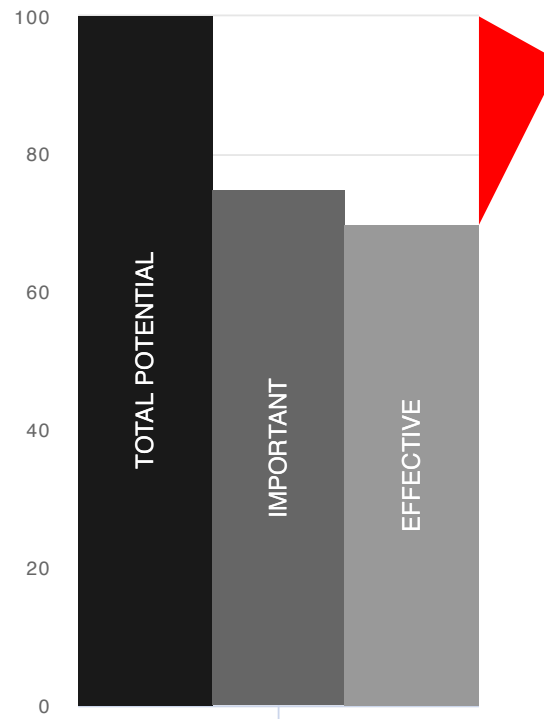


## GAP Scores

### CALCULATION SUMMARY

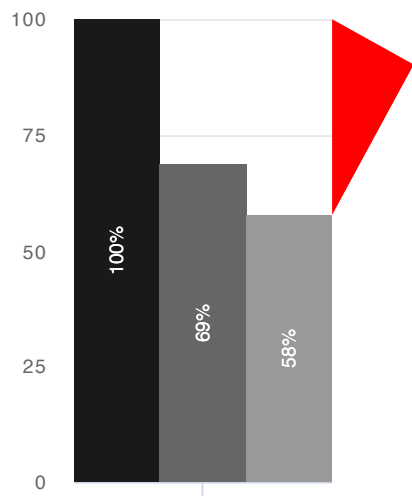
Graph percentages represent the Total Potential score compared to the weighted Important and Effective Scale scores.

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



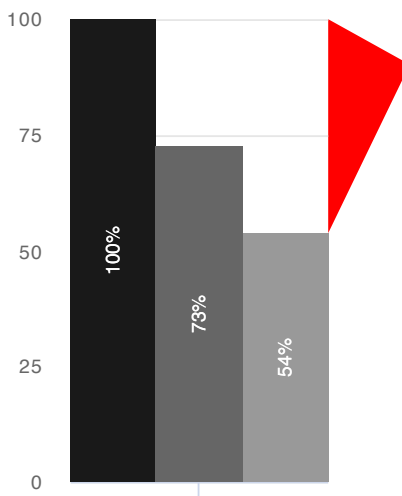
### GAP SCORE %

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



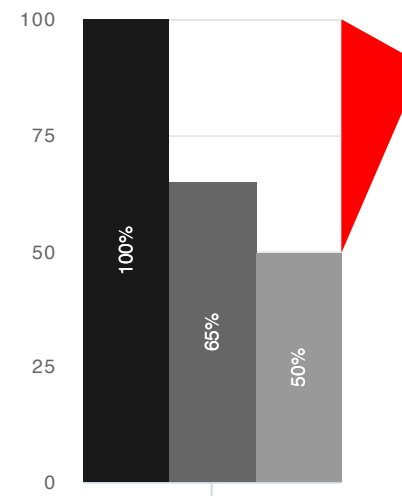
### GAP 42%

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



### GAP 46%

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

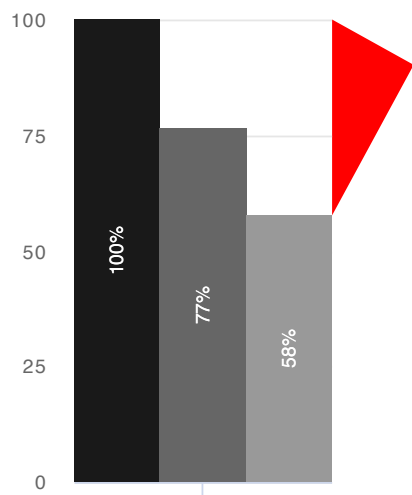


### GAP 50%

Living by the values of the organization while at work  
[#24 & #36]

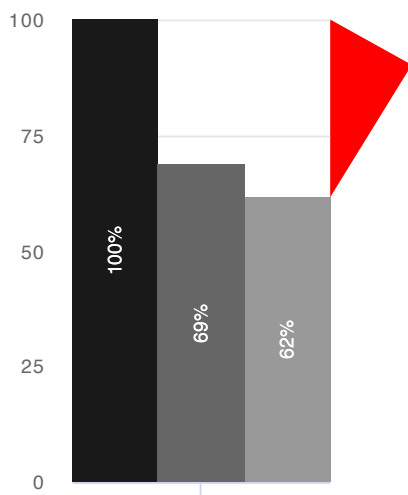


## GAP Scores



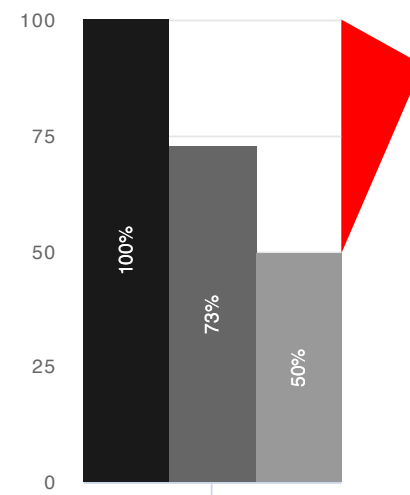
**GAP 42%**

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



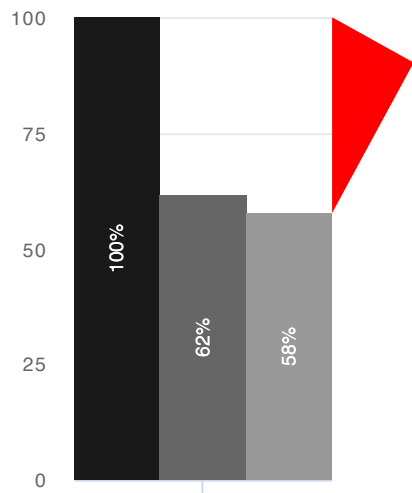
**GAP 38%**

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



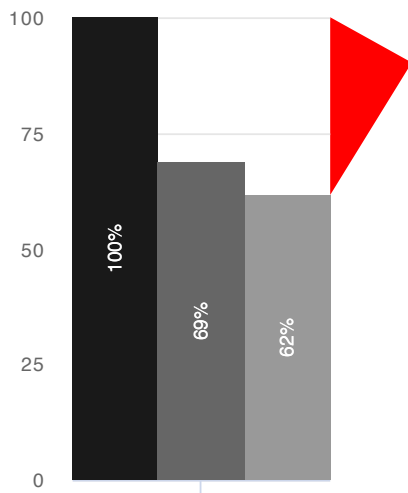
**GAP 50%**

Receiving frequent, regular feedback  
[#27 & #39]



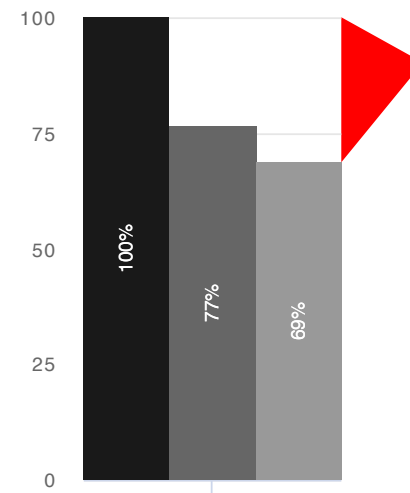
**GAP 42%**

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



**GAP 38%**

Product and industry knowledge  
[#29 & #41]



**GAP 31%**

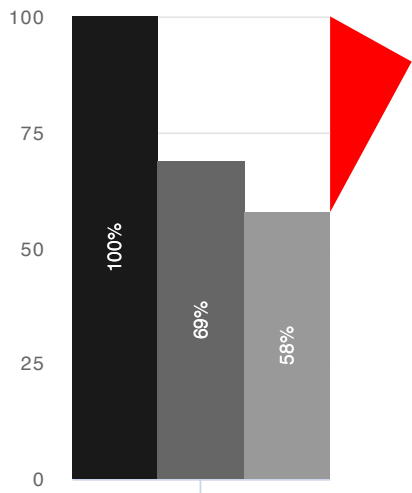
Managing customer impressions of our organization  
[#30 & #42]

Total Potential

Important

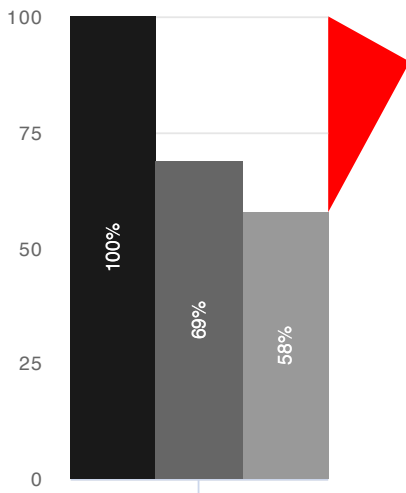
Effective

## GAP Scores



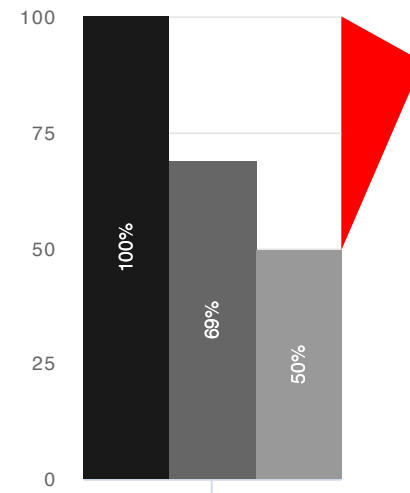
**GAP 42%**

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



**GAP 42%**

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



**GAP 50%**

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

Total Potential

Important

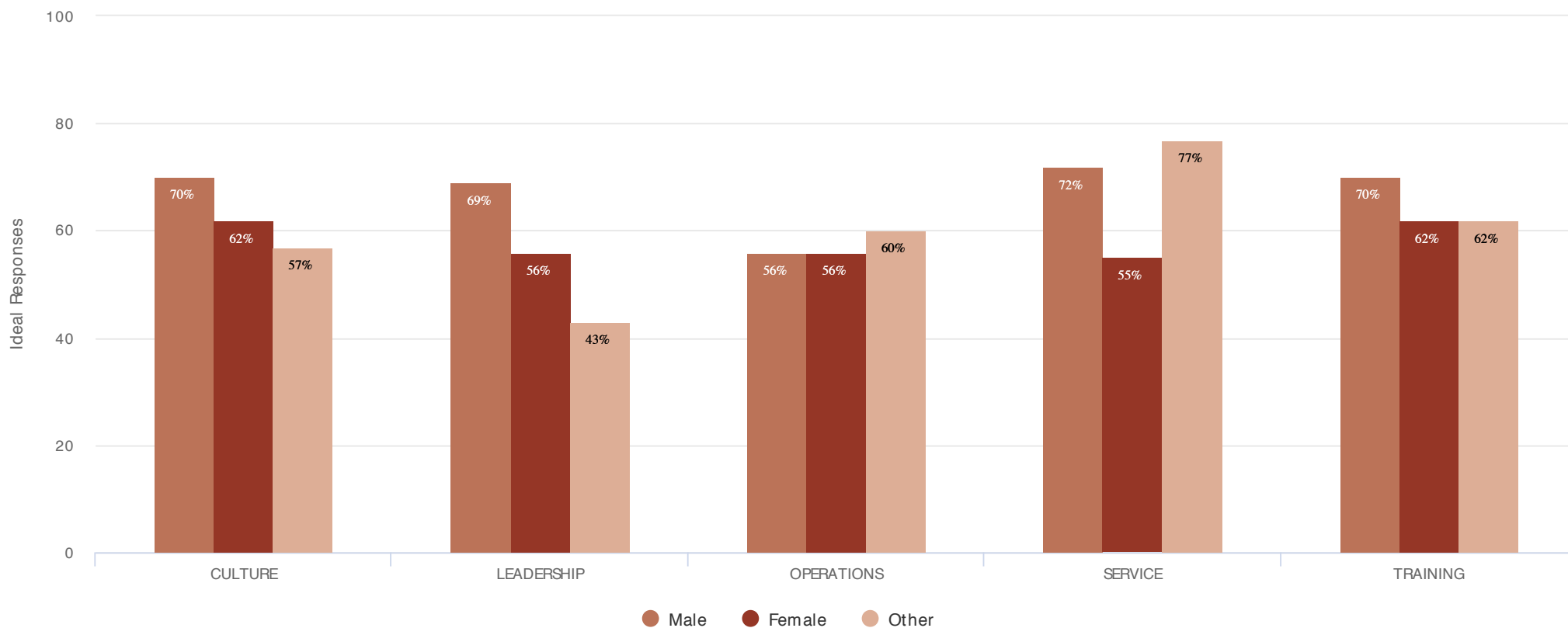
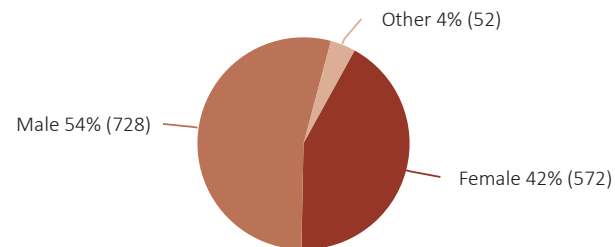
Effective

# Ideal Responses by NF-KPI and Gender

## CALCULATION SUMMARY

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

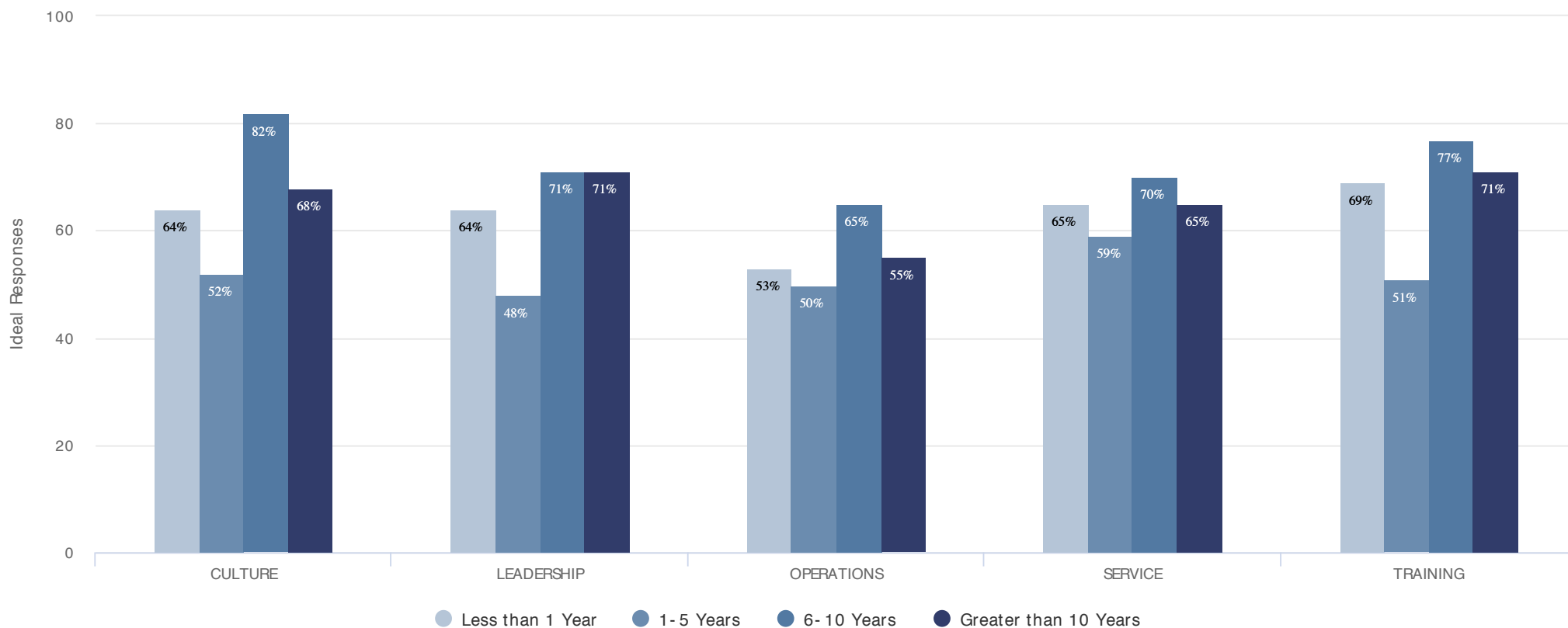
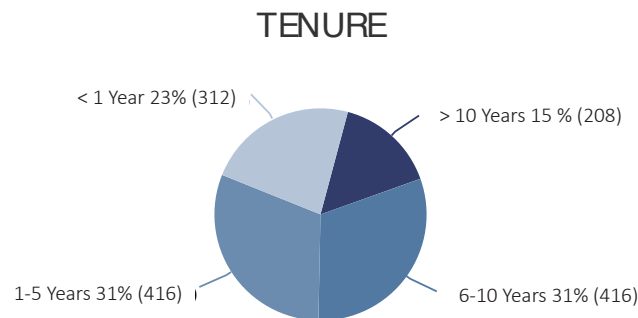
### GENDER



# Ideal Responses by NF-KPI and Tenure

## CALCULATION SUMMARY

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

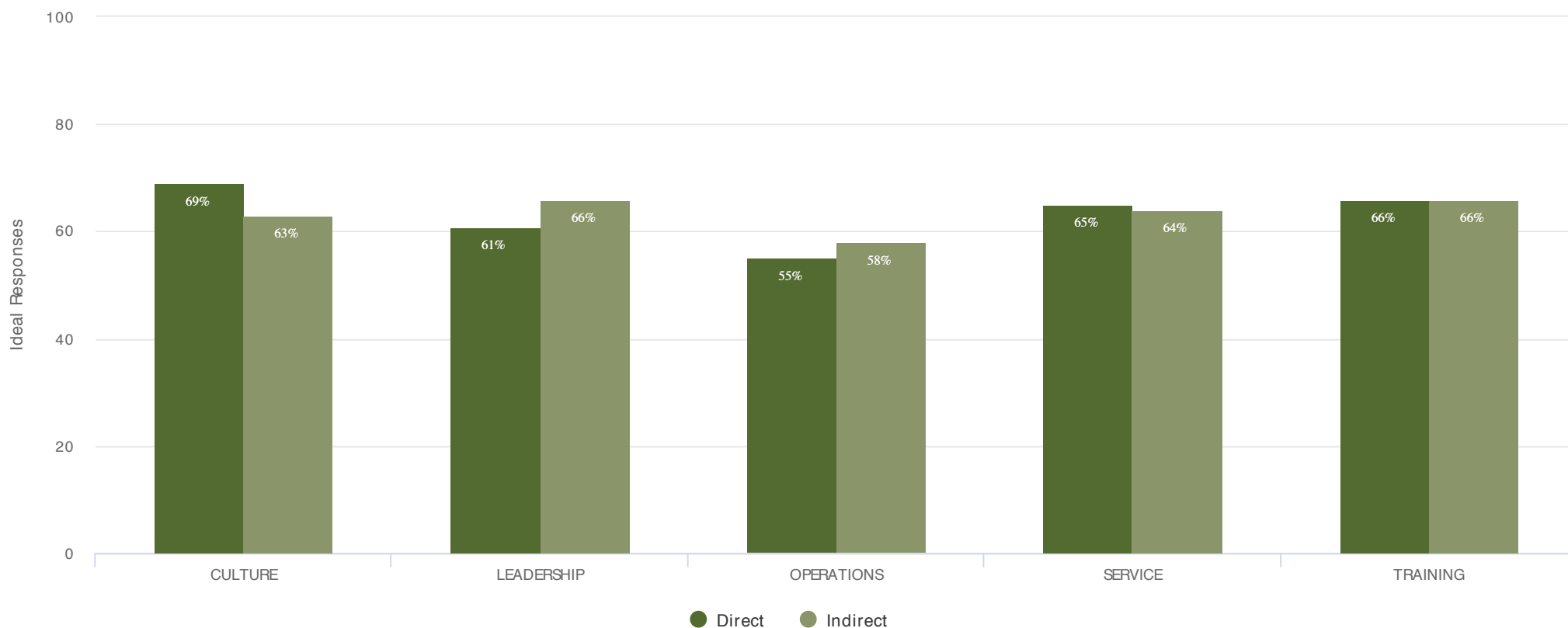
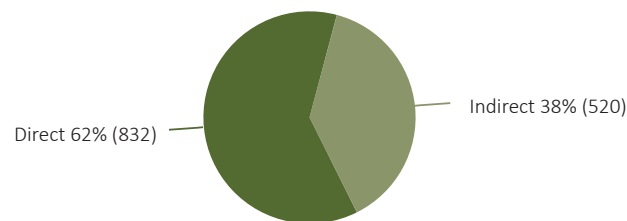


# Ideal Responses by NF-KPI and Level of Customer Interaction

## CALCULATION SUMMARY

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

## LEVEL OF CUSTOMER INTERACTION

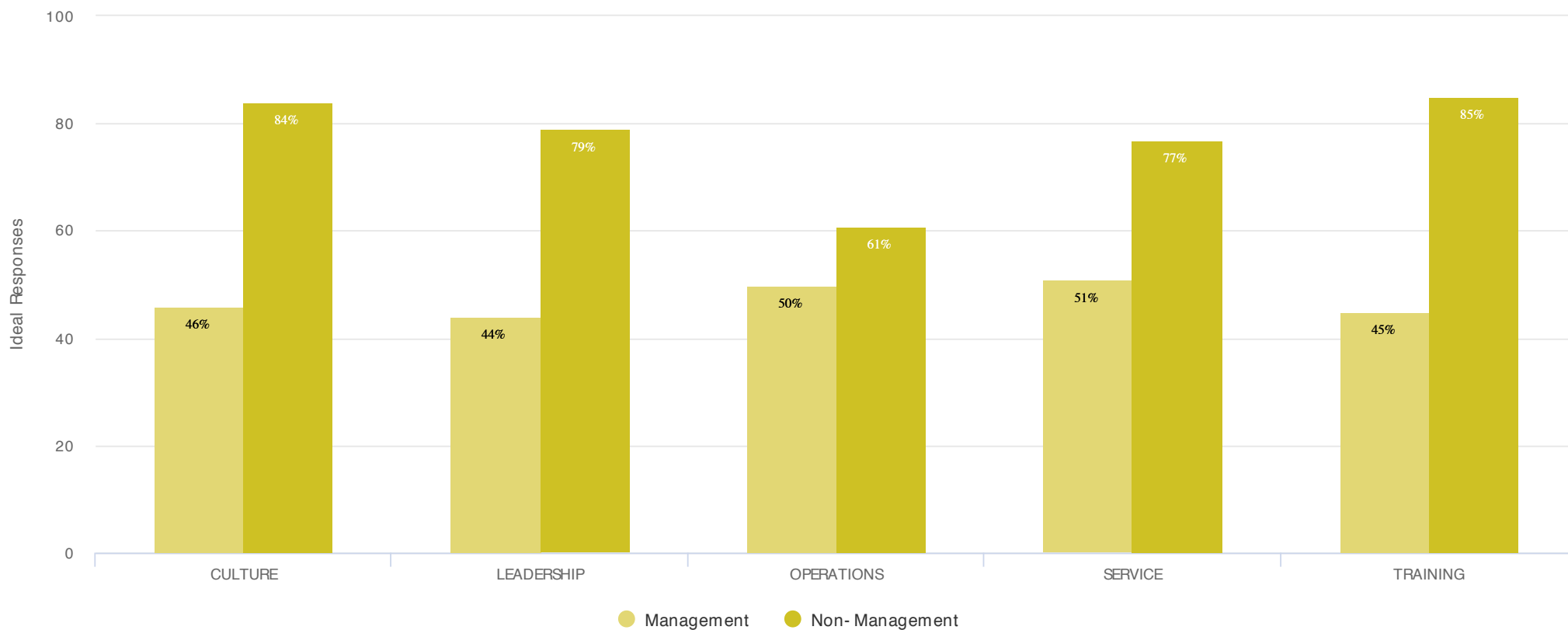
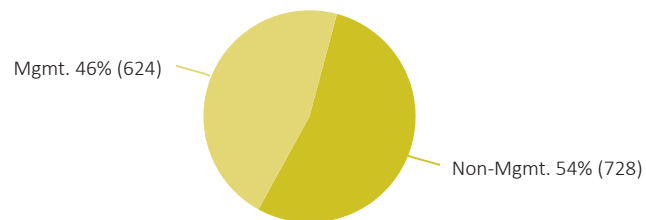


# Ideal Responses by NF-KPI and Role

## CALCULATION SUMMARY

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

### ROLE



## 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
81%	5. We have clearly defined customer satisfaction goals.	True	Service	H M L
81%	20. We are trained to deliver customer service at a high standard.	True	Training	H M L

### PERFORMANCE CONCERNS

IDEAL RESP.	STATEMENT	Scale	NF-KPI	PRIORITY
23%	11. Most upset customers will tell us their complaints.	True	Service	H M L
27%	16. Management would be surprised to learn what it takes to get the job done due to our processes.	True	Operations	H M L
38%	9. Company communications are often unclear.	True	Operations	H M L