

# ASSESSMENTS & ROADMAPS™

*Measuring for Success in Your Organization*



Building  
Passionate  
Thinking  
Pure-Performance  
Organizations™



*of excellence*

“Luman’s assessments cut to the core of organizational issues. They measure causes and drivers, not just symptoms. These instruments aren’t “surveys,” but are truly assessments.

“Luman’s assessments are unique and comprehensive, and can really be used for benchmarking and improving organizational culture – not like the lightweight, non-actionable surveys we have seen too often.

“Luman gets into the details so they can answer big questions, like “Do we have the infrastructure, leadership, people, and change-readiness necessary to compete in today’s challenging environment?” and “Is our culture designed for passion and performance?” These questions and many more are answered head-on and intelligently in the reports and RoadMap™ provided by Luman.

“Luman assessments are extremely enlightening.”

-Amy Anderson-Winchell, COO & EVP, Occupations, Inc. and Executive Director, Family Empowerment Council, Inc.

## WHAT SETS LUMAN’S ASSESSMENTS APART

Since 1983, Luman has been on the cutting edge of cultural and organizational design and development, creating new tools, reinforcing often overlooked principles of excellence, and teaching organizations how to succeed.

Luman’s dedicated research team works diligently to ensure that our principles are rooted in organizational realities.

Luman believes that the intuitive truth of our principles can and should be validated through real-world quantitative methods supported where needed by incisive qualitative methods (interviews, focus groups, open houses, etc.). The research we do strongly supports our principles while providing compelling benchmarks for your organization.

Our extensive database includes data from tens of thousands of people in more than 1,000 organizations—public, private, government, and not-for-profit. Because of our research focus, we can often provide benchmark data specific to your size or industry.

These unique assessments will resonate with your experience as a leader striving for excellence.

## BENEFITS OF A LUMAN ASSESSMENT

There are many benefits of conducting a Luman assessment in your organization:

- ◆ Our assessments can create both internal and external benchmarks for your organization that let you measure against your *potential* (not just against peers or the past).
- ◆ Our online assessment package provides complete confidentiality and anonymity to your employees, leading to greater and higher-quality response while ensuring the integrity of your results. **You can visit our assessment site at <http://lumanresearch.com>.**
- ◆ Our research team has years of experience with Luman principles and research methodology, and can provide insightful and actionable commentary about your results in a *RoadMap™* to the future.
- ◆ Luman assessments are the only instruments testing the unique principles for *Building Passionate, Thinking, Pure-Performance Organizations™*. They will change your view of “surveys” (and what can be accomplished with people).

### How We Maximize Your Knowledge while Minimizing Your Employees’ Time

While the *Culture Quotient Series™* assessment is the most in-depth and comprehensive assessment on organizational effectiveness on the market, Luman has taken steps to make sure your organization can reap all of the benefits of the CQs while having each employee spend only 45-60 minutes per “Quotient.” They can do the assessment in multiple sessions and break up the time. We can reduce the time even further by randomly assigning CQ sections to employees, with each employee taking only 2 of the 5 sections.

Our expert analysts will combine the array of data gathered from your employees and provide a report highlighting the *Critical Themes & Issues™* uncovered by the assessment.

“Luman’s quantitative and qualitative assessments, their resulting RoadMap™, and the meetings they facilitated to review our *Critical Themes & Issues™* were all outstanding and gave us a clear and actionable ‘road to the future.’ We have great confidence in Luman.”

- Cary Stockdell, Director, Organizational Development, Swift Energy Company

“We couldn’t have done it without Luman. They provided the guidance, direction, and support that we needed for this process to work.”

- Tom Isle, Vision Team Leader, Potlatch Corporation

## THE DIAMOND OF EXCELLENCE™

Organizations can maximize their potential with a framework to guide them to top-tier performance. The *Diamond of Excellence™* provides a comprehensive yet manageable framework, guiding organizations through 4 specific facets they must address to achieve powerful results and create value.

Luman guides you in designing and building 4 facets of organizational culture essential to producing world-class teams and bottom-line results:

- ↓ The *Reality Quotient™ (RQ™)*  
Measuring your *Truth Capital™*
- ↓ The *Passion Quotient™ (PQ™)*  
Measuring your *Passion Capital™*
- ↓ The *Thinking Quotient™ (TQ™)*  
Measuring your *Thinking Capital™*
- ↓ The *Pure-Performance Quotient™ (PPQ™)*  
Measuring your *Performance Capital™*

- Each CQ is divided into 5 value-oriented sections.
- ↓ DNA – What is your organizational mindset?
  - ↓ Infrastructure – What is your organizational capacity?
  - ↓ Leadership – What is your leadership potential?
  - ↓ People – What is your staff potential?
  - ↓ Transformation – What is your adaptive capacity?

Each of these sections can be taken as a stand-alone assessment. It can also be combined horizontally with its equivalent in the other 3 CQs to yield a profound view of your organization's mindset, capacity, or potential.

We recommend building one assessment per quarter into your plans for achievement – and then cycling them annually to note progress, close gaps, and leverage strengths. For only a few hours per employee per year, you can have a complete analysis of your organization's *Cultural Capacity™* – reality, passion, thinking, and *Pure-Performance™*. And this will automatically, without further time commitment on your part, allow us to cross reference the 4 assessments horizontally and to report on the 5 assessment sections (DNA, Infrastructure, Leadership, People, and Transformation).

See the plan at the top of the next page.



## ASSESSMENTS: THE CULTURE QUOTIENT SERIES™

The *Culture Quotient Series™* is Luman's unique and incisive package for leaders and organizations.

Luman offers 4 comprehensive assessments that provide an array of actionable results. The 4 *Culture Quotient™ (CQ)* assessments measure your organization on the 4 facets of the *Diamond of Excellence™*.

## YOU SELECT WHAT YOU WANT TO KNOW

The comprehensive assessment plan:

ASSESSMENT SECTIONS:	Reality Quotient™	Passion Quotient™	Thinking Quotient™	Pure-Performance Quotient™	HORIZONTAL SUM EQUALS:
DNA	Q1	Q2	Q3	Q4	Organizational Mindset
Infrastructure	Q1	Q2	Q3	Q4	Organizational Capacity
Leadership	Q1	Q2	Q3	Q4	Leadership Potential
Sum of the Above Three Sections	Readiness to Face Reality	Readiness to "Win the Hearts"	Readiness to "Win the Minds"	Readiness to Deliver Results	Readiness to Build Capital
People	Q1	Q2	Q3	Q4	Staff Potential
Transformation	Q1	Q2	Q3	Q4	Adaptive Capacity
VERTICAL SUM EQUALS:	Truth Capital™	Passion Capital™	Thinking Capital™	Performance Capital™	CULTURAL CAPACITY™

Annual Reports by Section

Quarterly Reports by Quotient

"I truly enjoy the opportunity to get to work with you to build our Pure-Performance™ team. I also appreciate the way you follow up. The opportunity to cement the learnings is something that so many other consultants miss."

- Kurt McCaslin, General Manager, Anadarko Petroleum (Brazil)

"Like many organizations we had formed bad habits through the years of inattention. Luman staff helped us to assess our organizational strengths and areas for improvement and formulate a plan to help us learn to cooperate, communicate and develop trust."

"Luman staff continues to help us as we change and grow by supporting our ongoing assessment of our accomplishments and what we need to move to the next phase."

- Ann Purvis, Senior Executive, MESSA

### Alternate Recommendation 1:

To determine the potential of your leadership team and the passion and commitment of your organization:

SECTIONS:	RQ™	PQ™	TQ™	PPQ™	
DNA		X			Organizational Mindset
Infrastructure		X			Organizational Capacity
Leadership	X	X	X	X	Leadership Potential
Sum of the Above Three Sections	Readiness to Face Reality	Readiness to "Win the Hearts"	Readiness to "Win the Minds"	Readiness to Deliver Results	Readiness to Build Capital
People		X			Staff Potential
Transformation		X			Adaptive Capacity
	Truth Capital™	Passion Capital™	Thinking Capital™	Performance Capital™	CULTURAL CAPACITY™

### Alternate Recommendation 2:

To determine your organization's degree of alignment with reality and where to focus your initial efforts:

SECTIONS:	RQ™	PQ™	TQ™	PPQ™	
DNA	X	X	X	X	Organizational Mindset
Infrastructure	X				Organizational Capacity
Leadership	X				Leadership Potential
Sum of the Above Three Sections	Readiness to Face Reality	Readiness to "Win the Hearts"	Readiness to "Win the Minds"	Readiness to Deliver Results	Readiness to Build Capital
People	X				Staff Potential
Transformation	X				Adaptive Capacity
	Truth Capital™	Passion Capital™	Thinking Capital™	Performance Capital™	CULTURAL CAPACITY™

“Passion is not an emotion. It’s a choice to be excellent. And it can be measured and dramatically increased.”

- James R. Lucas

“[Luman] shares how to smash through the walls of corporate complacency to create an energetic and spirit-filled workplace. Powerful, pragmatic, and (yes) passionate... Drive these principles deep into your organization, or risk becoming dull, boring, and obsolete.”

-Jim Harris, Ph.D., author of *Getting Employees to Fall in Love with Your Company*, coauthor of *Finding & Keeping Great Employees*

## SPECIALIZED ASSESSMENTS

### Qualitative Assessments

In some situations, qualitative assessment work is done to support, clarify, and amplify quantitative assessment data. In other situations, when the organization is not ready for a quantitative assessment, a qualitative assessment is performed to launch the process of positive change. In either case, our provocative, value-gleaning questions will deliver answers that will make an immediate difference for you.

### Vision, Mission, Values & Behaviors (VMVB™)

Building your own **VMVB™** is a key to creating alignment and line-of-sight to the organization’s strategy and **Critical Success Factors™** for all of your employees. Luman can create and administer a customized **VMVB™** assessment for your organization, giving you an internal benchmark for future comparison.

### Multi-Facet Insights™

**Multi-Facet Insights™** is Luman’s premier assessment package for leaders. The review is a comprehensive, multi-dimensional snapshot of an individual’s performance and competencies as perceived by subordinates, peers, and in some cases, superiors or others in the person’s value chain. Different from and deeper than the “360° Review,” **Multi-Facet Insights™** will show leaders what and how to change to reach personal **Pure Performance™**.

### Assessments Customized for Your Team

Luman has a wide spectrum of experience that spans geographical and industry lines. Using this experience, we develop customized assessments designed specifically for your organization. These can include elements of other Luman assessments.

*There are several specific times when customized assessments are highly valuable. For example:*

- ↓ Measuring strategic initiatives and making benchmark comparisons (**DashBoard™**)
- ↓ Reviewing and enhancing the organization’s decision-making process
- ↓ Correlating previously gathered organizational data with Luman principles

Luman will work with your leadership team to design and implement the ideal assessment solution for your organization. Through customized assessments, you will combine the best that both your organization and Luman have to offer.

## REPORTS

Luman assessments are typically gathered electronically. Results are calculated using advanced statistical software and analytical tools, and our expert analysts examine the results to glean additional inferences. The statistical analysis and expert opinions are integrated into the final assessment report.

Each report includes summary statistics, graphs, tables, and narrative explanations. Data is reported by demographic or by key Luman principles, and is compared with benchmark data where applicable (internal or external, or both). Final reports are formatted professionally and are ready to be presented to senior leadership, board members, the employee population at large – or all of these, at the appropriate level of detail.

Luman will work with you and your team to analyze the data set and convert it into overarching themes and specific critical issues—and then to assist in developing both **RoadMaps™** (recommendations) and **PlayBooks™** (action plans) to turn these into organizational gold. Follow-up assessments identify both progress to leverage and lagging areas to correct.

## RESEARCH METHODOLOGY

### Statistical Analyses for Assessments

Descriptive statistics (i.e., measures of central tendency and measures of dispersion) are used in analyzing survey data. Inferential statistics (e.g., testing hypotheses of difference, etc.) are used to find associations and correlations that yield important information (such as causation, impact, etc.).

### Normative Data

Normative data (used to compare your organization with the “norm”) is collected from a cross-section of organizations. These include public, private, not-for-profit, and government entities. Our database of normative data is continually expanding and as a result, our confidence interval continually improves (i.e., becomes smaller). Leaders often gain critical insights from cross-industry comparisons that get them out of the peer-group box.

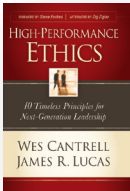
### Scoring Index

Central tendency bias is the tendency of raters to choose “average” when scoring items on an assessment. In order to defeat this tendency, Luman assessments use a rating scale that “forces” raters to choose a side rather than straddle the fence.

“Measure what is measurable and make measurable what is not so.”

- Galileo Galilei, astronomer

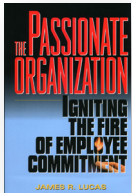
## THE RESEARCH THAT UNDERLIES THE LUMAN ASSESSMENTS:



*"The disasters that await us if we disconnect ethics from performance are...obvious. In this wonderful book.... Jim Lucas shows us what this connection looks like, and how it can be put to work to build prosperous organizations and careers."*

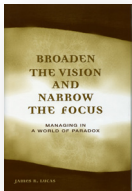
-**Steve Forbes**, President & CEO, Forbes, Inc.; Editor-in-Chief, Forbes magazine

High-Performance Ethics has also received high praise from Dr. Stephen R. Covey and Zig Ziglar.



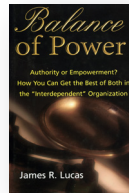
*"Passion is the critical link between great ideas and great accomplishments. It is the 'x-factor' that results in the sum of strategy and execution being greater than the parts. Mr. Lucas examines in depth what most business books consistently ignore. Bravo!"*

- **Terry L. Lay**, President, Lee Apparel (A Division of VF Corporation)



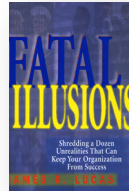
*"This book arms a business leader with information on how to use the power of paradoxes.... My leadership team and I plan to leverage these principles to develop a thinking organization."*

- **Glenn Hartman**, Director of Customer Operations, Procter & Gamble, North America



*"I have just read your invaluable book Balance of Power.... Congratulations. Not only is the topic extremely important (possibly the most important issue in the world today) but it is an extremely well-argued case."*

- **Dr. Bruce Lloyd**, Principal Lecturer in Strategy, South Bank Business School (London)



*"Fatal Illusions is a call for realism on the part of business leaders and managers as they work to make their businesses successful.... This book provides real meat."*

- **P.J. Adam**, Chairman & CEO, Black & Veatch



*"I started with \$600.00 and I am sitting here today listed as a billionaire. So what gives me the passion to do what I do? Why don't I say, "I've got all that I need" and get on a yacht?.... True satisfaction to me is about the bottom-bottom line which is that we are affecting peoples' lives...." [From Passionate Lives & Leaders]*

- **David Green**, Founder & CEO, Hobby Lobby International

*"It would be an understatement to say that I highly recommend the Luman Culture Quotients™. Use Luman's assessments, act on what they show you, and you will see a marked improvement in team morale, collaboration, decision-making, and performance."*

-**Amy Anderson-Winchell**, COO & EVP, Occupations, Inc. and Executive Director, Family Empowerment Council, Inc.



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We invite you to visit our assessment website  
at <http://lumanresearch.com>.