

January 27, 201X

Ms. Caring Leader
Vice President
ABC Productivity Inc.
140 Best Dr., Suite 120
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Sample
Actual Client
Needs Assessment
and Potential Benefits Report

E-Mailed to: C.Leader@abc.com

Subject: Effectiveness and Overload Gauge
Needs Assessment and Potential Benefits Report

Dear Mr. Leader,

Thank you for the opportunity to collect your team's input to the **Effectiveness and Overload Gauge™**. The invitation you e-mailed to your organization resulted in **48** surveys. Comparing the participants' input to benchmarks and data collected from our clients, the following report is in three sections:

- 1. Needs Assessment:** This section assesses the Overload Gauge, the Work Overload Indicator as well as the Meeting Effectiveness levels experienced by your teams. This highlights areas that may need special attention. Supporting graphs illustrate the survey findings.
- 2. Potential Benefits, Estimates and Recommendations:** This compares the participants' input to realistic benchmarks and data collected from our clients who took part in the Overcoming Overload workshop. This section also recommends areas where your organization may gain the greatest benefits.
- 3. Supporting Appendix:** The data collected is summarized in a collection of tables.

Summary:

In the following reports, please note that the **weighted averages** are:

- The **Overload Gauge is 23% higher** than the targeted benchmark.
- The **Work Overload Indicator is 31% above target.**
- The **Meeting Effectiveness is 23% below** the expected target. This translates into potential loss of **3.2** hours per person per week.

Recommendations:

Based on this survey, we propose a tailored **Overcoming Overload Workshop** and coaching. The targeted minimum improvements could be:

- Overload Gauge **12%**
- Work Overload Indicator **15%**
- Meeting/ Collaboration Effectiveness **23%**. This can be translated into a potential gain of **3.2** hours per person per week.

Needs Assessment

A. OVERLOAD GAUGE™

The Overload Gauge is the average score of **20 indicator statements** presented on a five (5) point scale with the target being **2.5** or less. The average score and related **variance from target** is grouped in the three Overload Gauge categories:

1. **Filtering System** or the ability to focus and prioritize on high value roles and relationships where the average reported score is **3.3**. (Var. **23%**)
2. **Input Systems** or the ability to control incoming e-mail, meetings, interruptions and other information sources and demands that cause overload. The average score is **3.2**. (Var. **23%**)
3. **Filing Systems** or the ability to control information clutter. Where the score is **2.9**. (Var. **18%**)

Your team's average score by job category is:

- Executives = **3.1**
- Directors = **3.7**
- Managers = **3.3**
- Team Leaders = **3.5**
- Staff = **3.1**
- ALL AVERAGE = **3.3**

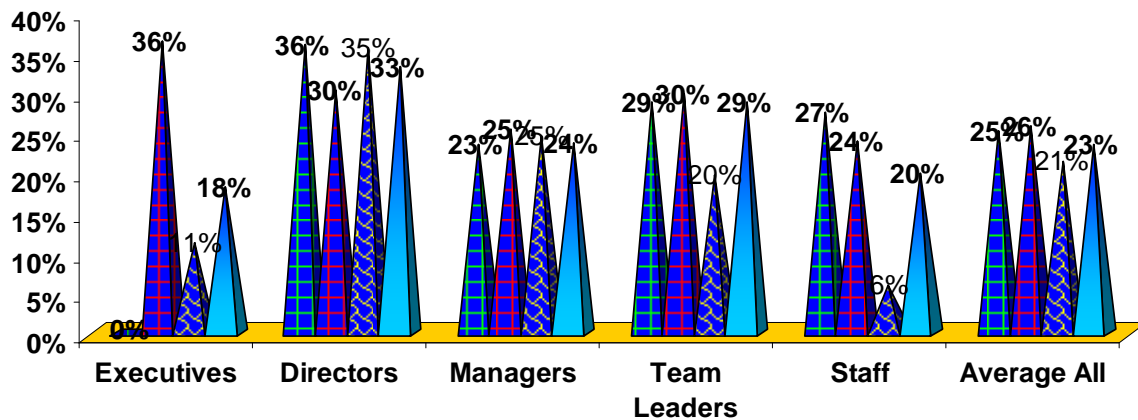
Please note that we find these scores similar to the average score of our clients **before taking our workshop**. Based on our client data, we believe that a score of:

- 0 – 1.4 = Low Overload
- 1.5 – 2.4 = Managed Overload
- 2.5 – 3.5 = Danger Zone
- 3.6 – 5.0 = Highly Overloaded

The following graph illustrates a consolidated view of your team's percentage variance from the target of 2.5. This variance is presented for each of the overload gauge groups by job category as well as the overall averages¹.

Overload Gauge Analysis: Potential Improvement % by Job Category

■ Filtering System ■ Input System ■ Filing System ■ Average



¹ Note: Graph presentation value differences are due to decimal rounding of calculated database values.

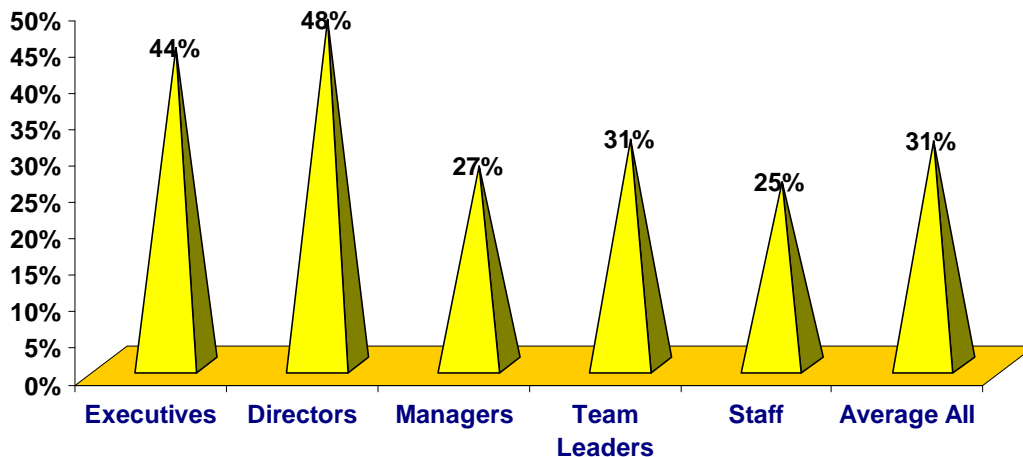
B. WORK OVERLOAD

The average hours worked by the job categories of your team are:

- Executives = 69 Hrs
- Directors = 59 Hrs
- Managers = 51 Hrs
- Team Leaders = 49Hrs
- Staff = 47 Hrs
- All Average = 51 Hrs

The following graph is the percentage difference from benchmark by job category.

Work Overload Indicator: Potential Improvement % by Job Category



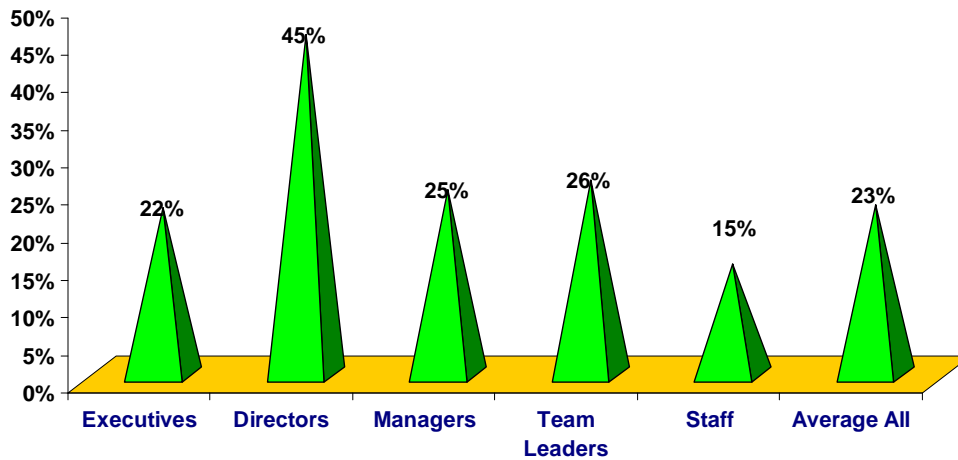
C. MEETING EFFECTIVENESS

In a collaborative work environment meetings are much a more effective communication tools than other media and should be encouraged. As more time is spent in meetings, meeting effectiveness becomes a critical indicator of the return on invested time. The following lists your team's average percentage of time in meetings, effectiveness and potential hours gain by the job categories:

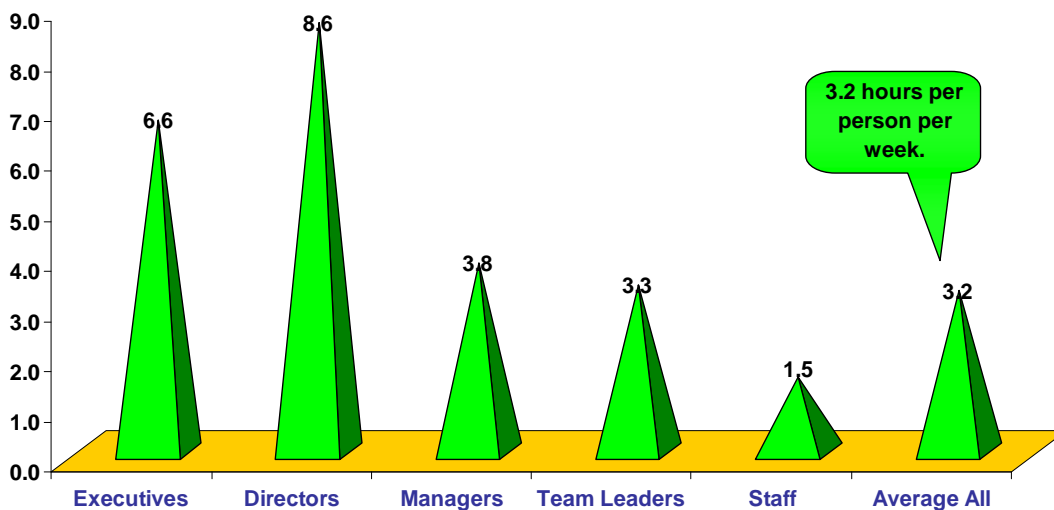
Job category	% Of Time In Meetings	% of Effectiveness	Target/ Benchmark Effectiveness	Difference or % Potential Effectiveness Gain	Potential Hours Gain Per Person Per week
Executives	48%	70%	90%	22%	6.6
Directors	38%	47%	85%	45%	8.6
Managers	37%	60%	80%	25%	3.8
Team Leaders	35%	56%	75%	26%	3.3
Staff	26%	68%	80%	15%	1.5
Average All	35%	62%	79%	23%	3.2

In the previous table, please note that the overall teams meeting effectiveness is **62%** compared to the weighted average benchmark of **79%**. When translated into potential hours to be gained per person per week this variance ranges from **-1.5** hours to **6.6** hours with an overall average of **3.2** hours per person per week. In addition, when lost opportunity costs are considered, this loss or gain is almost doubled. The following graphs illustrate these findings:

Meeting Effectiveness: Potential Improvement % by Job Category

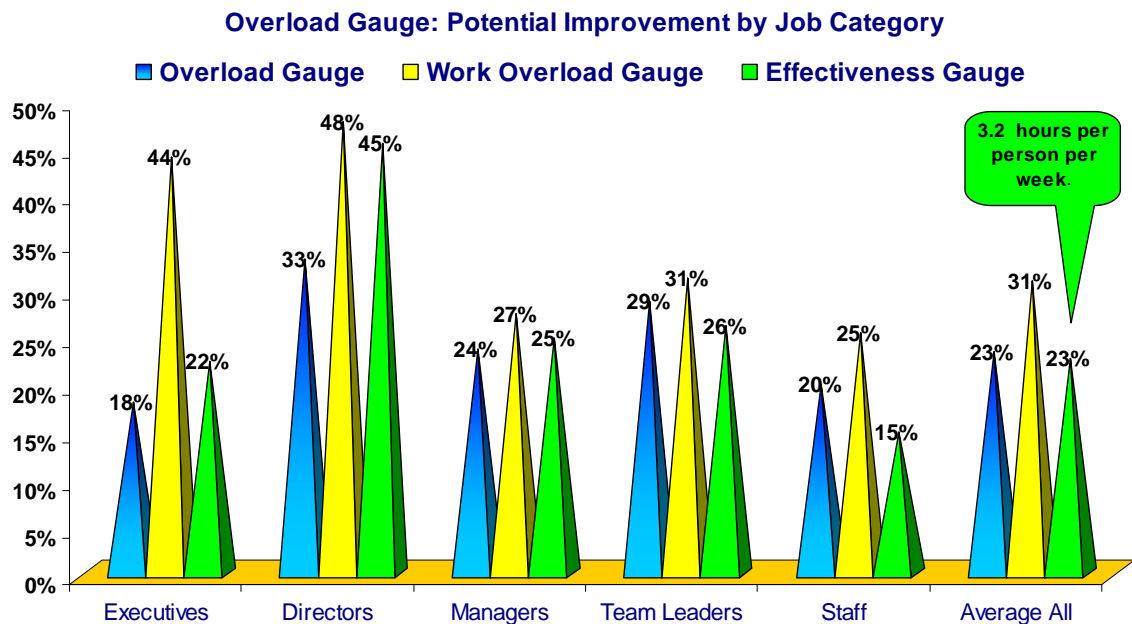


Meeting Effectiveness: Potential Gained Hours per Person per Week by Job Category



Potential Benefits and Recommendations:

The following graph combines percentage variance in the Overload Gauge, the Work Overload Indicator, and Meeting Effectiveness Indicators by job category. The objective is to identify the job category group that is likely to receive the highest benefits from a potential workshop and coaching.



Please Note:

1) When compared to benchmarks and data from clients who took part in the Overcoming Overload workshop and were supported by coaching, leadership empowerment and accountability, there is a potential overload gauge improvement of **23%**. This is highlighted in three Overload Gauge groups:

- **Filtering System** or the ability to focus and prioritize on high value roles and relationships reflects a potential of **25% improvement**. Within this section we recommend a special focus on the need for improved control and empowerment, and the need to focus on important collaboration and relationships where the potential benefits could be highest.
- **Input Systems** or the ability to control the unrealistic expectations and incoming e-mail, meetings and interruptions. Here we see a potential of **26% improvement**. Within this section we recommend a special focus on e-mail and reduced interruptions. Improved meeting effectiveness should also be a key target.
- **Filing Systems** or the ability to control information clutter indicates a potential of **21% improvement**. Within this section we recommend a special focus on reducing desktop clutter and developing a low maintenance filing system that can help the participants find needed information with ease.

2) **The Work Overload Summary** reflects a deviation of **31% from the benchmark**. We believe that this can be changed especially in light of the high scores given for statements on the input system and filtering system. There are low lying fruits in decreasing e-mail overload and reducing interruptions. In addition, studies indicate that white collar workers **spend 10 to 30 %** of their time looking for information. Our Frequency Use Filing System™ reduces information clutter and can help recover significant hours and wasted time. We believe this can lead to **reduced work overload and enhanced work/life balance**.

3) **Meeting Effectiveness Summary** reflects **23%** below target. This deserves special consideration especially among in the more collaborative work functions and more senior job categories. Improvements in this area can result in a weighted average gain of **3.2** hours per person per week. This can be translated into improved productivity and/or work life balance.

Potential Dollar (\$) loss (or Gain) may be calculated using the average lost hours for each category [X] average burdened hourly [X] the number of staff in each category. In addition please consider the lost opportunity costs. In other words, for every hour wasted due to meeting ineffectiveness an equal hour of lost opportunity benefits vanishes.

RECOMMENDATIONS

Based on the above analysis, we recommend the **Overcoming Overload Workshop**:

- Tailored to meet specific objectives that you identify
- Focused on a specific mix of participants that can receive the greatest value reflected above. We suggest these are the **Managers, Team Leaders and Staff**

In addition, we recommend you consider offering optional:

- One on one in office and phone follow-up, coaching and support
- Progress reporting using the **Effectiveness and Overload Gauge™** which provides individual and group progress reports for benefits measurement and accountability
- One year phone and e-mail support and coaching including our e-letters and webinars.

Based on these results, we believe that with leadership support, accountability **The Overcoming Overload Workshop** will help your team achieve the minimum improvements and benefits outlined in the page one summary. The above does not include subjective benefits and improvements such as enhanced feeling of control and improved work/life balance that are often mentioned by those who take our workshop.

Please note that at the end of our workshop you will receive two reports:

- Participants' evaluation and feedback which will indicate how well we related to the participants' perceived needs
- Realized benefits report which indicates actual realized benefits from our delivery and coaching time.

Looking forward to serving you, I will call you to answer your questions.

Sincerely,

Baha Habashy

Gauges by Job Category

Summary, Details are provided on next pages

XRX208, XRX608

% Present and % Potential Change by Job Category											
Data / Average	Number of Surveys Received	Overload Gauge		Work Overload			Meeting Effectiveness				
		Overall Average Score	Difference from Benchmark	Hours Worked	Benchmark	Difference from Benchmark	% Time in Meetings	Meeting Effectiveness %	Target Effectiveness Benchmark	Potential Effectiveness Gain	Potential Lost Hours per Person per Week
Executives	1	3.1	18%	69.00	48	44%	47.8%	70.0%	90%	22%	6.6
Directors	3	3.7	33%	59.00	40	48%	37.8%	46.5%	85%	45%	8.6
Managers	24	3.3	24%	50.92	40	27%	37.4%	60.2%	80%	25%	3.8
Team Leaders	10	3.5	29%	48.50	37	31%	35.0%	55.5%	75%	26%	3.3
Staff	10	3.1	20%	47.60	38	25%	26.3%	68.2%	80%	15%	1.5
Average All	48	3.3	23%	51.2	39.1	31%	34.8%	61.5%	79.5%	23%	3.2

Overload Gauge, % Difference From Benchmark. Summary by System							XRX208, XRX608	
Overload Gauge Summary Category and Potential Improvement % By Job Category	Executive	Directors	Managers	Team Leaders	Staff	Average All		
Filtering Systems - The ability to effectively prioritize and focus on higher value roles, goals and relationships	0%	36%	23%	29%	27%	25%		
Input Systems - The ability to effectively control unrealistic demands and expectations created by e-mail, phone, meetings, interruptions and paper	36%	30%	25%	30%	24%	26%		
Filing Systems - The ability to create clutter free filing system that improves the timely access to needed information with minimum maintenance and overhead	11%	35%	25%	20%	6%	21%		
Overall Average	18%	33%	24%	29%	20%	23%		

% = Need or Potential Benefits, Color Code



POTENTIAL BENEFITS

CONSOLIDATED REPORT - Project Codes:

XRX208, XRX608

On a 5 point scale do you agree with the following statement?		% Potential Benefits					
		All Participants	Executive	Directors	Managers	Team Leaders	Staff
1	I have no control over the amount of my voice mail, e-mail, meetings, and interruptions	30%	14%	36%	27%	32%	36%
2	People place urgent demands on my life.	27%	27%	37%	28%	25%	21%
3	My roles and responsibilities cover many subjects and are hard to classify.	36%	23%	54%	30%	41%	41%
4	At work I do not feel equipped and empowered to be the best I can be and do what I love to do.	20%	-21%	27%	16%	29%	29%
5	I often give up my personal life in order to keep up with all I have to do.	13%	-49%	26%	13%	7%	13%
6	I do not have written personal goals that relate to my personal and corporate roles.	26%	-32%	43%	29%	20%	15%
7	I treat all people equally ; it is hard for me to define who is more important.	21%	-6%	9%	15%	37%	35%
Sub -Total: Filtering System Score		25%	0%	36%	23%	29%	27%
8	By end of day, my e-mail in box usually has more than 10 items .	37%	49%	41%	39%	27%	27%
9	At the end of most days I have voice mail to which I should have responded.	-28%	-47%	-26%	-31%	-5%	-23%
10	I feel guilty if I have not responded to my calls.	42%	54%	46%	41%	45%	42%
11	On an average 70% of the time spent in meetings is unproductive.	18%	14%	23%	15%	17%	22%
12	I find taking notes in meetings stressful.	-21%	41%	-76%	-12%	-63%	-55%
13	I get too many unscheduled meetings or interruptions per day.	42%	-16%	42%	41%	46%	45%
14	My in basket/inbox usually has material that are more than 2 days old .	17%	46%	42%	11%	28%	18%
Sub -Total: Input System Score		26%	36%	30%	25%	30%	24%
15	I feel I need more workspace .	-22%	-157%	-93%	-6%	-35%	-51%
16	More than 70% of my desk is often covered by papers.	-15%	-47%	20%	-18%	-23%	-23%
17	It takes me more than one minute to find an important document in my paper files	23%	-16%	30%	29%	17%	3%
18	It would take my associates more than three minutes to find an important document in my filing system .	31%	36%	49%	36%	8%	1%
19	It would take me more than 30 seconds to find an item in my electronic or e-mail files .	3%	-47%	32%	3%	-1%	-9%
20	I am often behind on my reading . This bothers me.	36%	54%	46%	36%	34%	30%
Sub -Total: Filing System Score		21%	11%	35%	25%	20%	6%
AVERAGE TOTAL OVERLOAD SCORES		23%	18%	33%	24%	29%	20%
AVERAGE TOTAL HOURS PER WEEK		24%	30%	32%	21%	24%	20%
% AVERAGE TIME SPENT IN MEETINGS		-34%	-36%	-46%	-34%	-14%	-52%
% AVERAGE MEETING EFFECTIVENESS		29%	29%	83%	33%	35%	17%

% = Need or Potential Benefits, Color Code

High

Medium

Low

Effectiveness and Overload Gauge, Potential Improvement Estimates

Note: (A) = Average score your participants' input, (B) = Average score our clients post training & coaching
(%) = Potential improvement

POTENTIAL BENEFITS		All Participants		
CONSOLIDATED REPORT - Project Codes:		(A)= Team input (B) Benchmark (%) Potential Benefit.		
XRX208, XRX608		48	<< # Surveys Received	
On a 5 point scale do you agree with the following statement?		(A)	(B)	(%)
1	I have no control over the amount of my voice mail, e-mail, meetings, and interruptions	3.68	2.57	30%
2	People place urgent demands on my life.	4.03	2.94	27%
3	My roles and responsibilities cover many subjects and are hard to classify.	3.61	2.32	36%
4	At work I do not feel equipped and empowered to be the best I can be and do what I love to do.	3.03	2.42	20%
5	I often give up my personal life in order to keep up with all I have to do.	3.42	2.97	13%
6	I do not have written personal goals that relate to my personal and corporate roles.	3.58	2.64	26%
7	I treat all people equally ; it is hard for me to define who is more important.	2.68	2.13	21%
Sub -Total: Filtering System Score		3.43	2.57	25%
8	By end of day, my e-mail in box usually has more than 10 items .	4.05	2.57	37%
9	At the end of most days I have voice mail to which I should have responded.	2.29	2.94	-28%
10	I feel guilty if I have not responded to my calls.	4.00	2.32	42%
11	On an average 70% of the time spent in meetings is unproductive.	3.13	2.57	18%
12	I find taking notes in meetings stressful.	2.42	2.94	-21%
13	I get too many unscheduled meetings or interruptions per day.	3.97	2.32	42%
14	My in basket/inbox usually has material that are more than 2 days old .	3.29	2.72	17%
Sub -Total: Input System Score		3.31	2.46	26%
15	I feel I need more workspace .	2.11	2.57	-22%
16	More than 70% of my desk is often covered by papers.	2.55	2.94	-15%
17	It takes me more than one minute to find an important document in my paper files	3.00	2.32	23%
18	It would take my associates more than three minutes to find an important document in my filing system .	3.71	2.57	31%
19	It would take me more than 30 seconds to find an item in my electronic or e-mail files .	3.03	2.94	3%
20	I am often behind on my reading . This bothers me.	3.63	2.32	36%
Sub -Total: Filing System Score		3.01	2.37	21%
AVERAGE TOTAL OVERLOAD SCORES		3.26	2.50	23%
AVERAGE TOTAL HOURS PER WEEK		51.2	39.1	24%
% AVERAGE TIME SPENT IN MEETINGS		34.8%	46%	-34%
% AVERAGE MEETING EFFECTIVENESS		61.5%	79%	29%

% = Need or Potential Benefits, Color Code

High
Medium
Low

Effectiveness and Overload Gauge, Potential Improvement Estimates

Note: (A) = Average score your participants' input, (B) = Average score our clients post training & coaching
(%) = Potential improvement

POTENTIAL BENEFITS CONSOLIDATED REPORT - Project Codes: XRX208, XRX608		Executive		
		(A)= Team input (B) Benchmark (%) Potential Benefit.		
		1	<< # Surveys Received	
On a 5 point scale do you agree with the following statement?		(A)	(B)	(%)
1	I have no control over the amount of my voice mail, e-mail, meetings, and interruptions	3.00	2.57	14%
2	People place urgent demands on my life.	4.00	2.94	27%
3	My roles and responsibilities cover many subjects and are hard to classify.	3.00	2.32	23%
4	At work I do not feel equipped and empowered to be the best I can be and do what I love to do.	2.00	2.42	-21%
5	I often give up my personal life in order to keep up with all I have to do.	2.00	2.97	-49%
6	I do not have written personal goals that relate to my personal and corporate roles.	2.00	2.64	-32%
7	I treat all people equally ; it is hard for me to define who is more important.	2.00	2.13	-6%
Sub -Total: Filtering System Score		2.57	2.57	0%
8	By end of day, my e-mail in box usually has more than 10 items .	5.00	2.57	49%
9	At the end of most days I have voice mail to which I should have responded.	2.00	2.94	-47%
10	I feel guilty if I have not responded to my calls.	5.00	2.32	54%
11	On an average 70% of the time spent in meetings is unproductive.	3.00	2.57	14%
12	I find taking notes in meetings stressful.	5.00	2.94	41%
13	I get too many unscheduled meetings or interruptions per day.	2.00	2.32	-16%
14	My in basket/inbox usually has material that are more than 2 days old .	5.00	2.72	46%
Sub -Total: Input System Score		3.86	2.46	36%
15	I feel I need more workspace .	1.00	2.57	-157%
16	More than 70% of my desk is often covered by papers.	2.00	2.94	-47%
17	It takes me more than one minute to find an important document in my paper files	2.00	2.32	-16%
18	It would take my associates more than three minutes to find an important document in my filing system .	4.00	2.57	36%
19	It would take me more than 30 seconds to find an item in my electronic or e-mail files .	2.00	2.94	-47%
20	I am often behind on my reading . This bothers me.	5.00	2.32	54%
Sub -Total: Filing System Score		2.67	2.37	11%
AVERAGE TOTAL OVERLOAD SCORES		3.05	2.50	18%
AVERAGE TOTAL HOURS PER WEEK		69.0	48.0	30%
% AVERAGE TIME SPENT IN MEETINGS		47.8%	65%	-36%
% AVERAGE MEETING EFFECTIVENESS		70.0%	90%	29%

% = Need or Potential Benefits, Color Code

High	Medium	Low
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Effectiveness and Overload Gauge, Potential Improvement Estimates

Note: (A) = Average score your participants' input, (B) = Average score our clients post training & coaching
(%) = Potential improvement

POTENTIAL BENEFITS CONSOLIDATED REPORT - Project Codes: XRX208, XRX608		Directors		
		(A)= Team input (B) Benchmark (%) Potential Benefit.		
		3	<< # Surveys Received	
On a 5 point scale do you agree with the following statement?		(A)	(B)	(%)
1	I have no control over the amount of my voice mail, e-mail, meetings, and interruptions	4.00	2.57	36%
2	People place urgent demands on my life.	4.67	2.94	37%
3	My roles and responsibilities cover many subjects and are hard to classify.	5.00	2.32	54%
4	At work I do not feel equipped and empowered to be the best I can be and do what I love to do.	3.33	2.42	27%
5	I often give up my personal life in order to keep up with all I have to do.	4.00	2.97	26%
6	I do not have written personal goals that relate to my personal and corporate roles.	4.67	2.64	43%
7	I treat all people equally ; it is hard for me to define who is more important.	2.33	2.13	9%
Sub -Total: Filtering System Score		4.00	2.57	36%
8	By end of day, my e-mail in box usually has more than 10 items .	4.33	2.57	41%
9	At the end of most days I have voice mail to which I should have responded.	2.33	2.94	-26%
10	I feel guilty if I have not responded to my calls.	4.33	2.32	46%
11	On an average 70% of the time spent in meetings is unproductive.	3.33	2.57	23%
12	I find taking notes in meetings stressful.	1.67	2.94	-76%
13	I get too many unscheduled meetings or interruptions per day.	4.00	2.32	42%
14	My in basket/inbox usually has material that are more than 2 days old .	4.67	2.72	42%
Sub -Total: Input System Score		3.52	2.46	30%
15	I feel I need more workspace .	1.33	2.57	-93%
16	More than 70% of my desk is often covered by papers.	3.67	2.94	20%
17	It takes me more than one minute to find an important document in my paper files	3.33	2.32	30%
18	It would take my associates more than three minutes to find an important document in my filing system .	5.00	2.57	49%
19	It would take me more than 30 seconds to find an item in my electronic or e-mail files .	4.33	2.94	32%
20	I am often behind on my reading . This bothers me.	4.33	2.32	46%
Sub -Total: Filing System Score		3.67	2.37	35%
AVERAGE TOTAL OVERLOAD SCORES		3.73	2.50	33%
AVERAGE TOTAL HOURS PER WEEK		59.0	40.0	32%
% AVERAGE TIME SPENT IN MEETINGS		37.8%	55%	-46%
% AVERAGE MEETING EFFECTIVENESS		46.5%	85%	83%

% = Need or Potential Benefits, Color Code

High
Medium
Low

Effectiveness and Overload Gauge, Potential Improvement Estimates

Note: (A) = Average score your participants' input, (B) = Average score our clients post training & coaching
(%) = Potential improvement

POTENTIAL BENEFITS CONSOLIDATED REPORT - Project Codes: XRX208, XRX608		Managers		
		(A)= Team input (B) Benchmark (%) Potential Benefit.		
		24	<< # Surveys Received	
On a 5 point scale do you agree with the following statement?		(A)	(B)	(%)
1	I have no control over the amount of my voice mail, e-mail, meetings, and interruptions	3.54	2.57	27%
2	People place urgent demands on my life.	4.08	2.94	28%
3	My roles and responsibilities cover many subjects and are hard to classify.	3.33	2.32	30%
4	At work I do not feel equipped and empowered to be the best I can be and do what I love to do.	2.88	2.42	16%
5	I often give up my personal life in order to keep up with all I have to do.	3.42	2.97	13%
6	I do not have written personal goals that relate to my personal and corporate roles.	3.71	2.64	29%
7	I treat all people equally ; it is hard for me to define who is more important.	2.50	2.13	15%
Sub -Total: Filtering System Score		3.35	2.57	23%
8	By end of day, my e-mail in box usually has more than 10 items .	4.21	2.57	39%
9	At the end of most days I have voice mail to which I should have responded.	2.25	2.94	-31%
10	I feel guilty if I have not responded to my calls.	3.92	2.32	41%
11	On an average 70% of the time spent in meetings is unproductive.	3.04	2.57	15%
12	I find taking notes in meetings stressful.	2.62	2.94	-12%
13	I get too many unscheduled meetings or interruptions per day.	3.96	2.32	41%
14	My in basket/inbox usually has material that are more than 2 days old .	3.04	2.72	11%
Sub -Total: Input System Score		3.29	2.46	25%
15	I feel I need more workspace .	2.42	2.57	-6%
16	More than 70% of my desk is often covered by papers.	2.50	2.94	-18%
17	It takes me more than one minute to find an important document in my paper files	3.25	2.32	29%
18	It would take my associates more than three minutes to find an important document in my filing system .	4.00	2.57	36%
19	It would take me more than 30 seconds to find an item in my electronic or e-mail files .	3.04	2.94	3%
20	I am often behind on my reading . This bothers me.	3.62	2.32	36%
Sub -Total: Filing System Score		3.14	2.37	25%
AVERAGE TOTAL OVERLOAD SCORES		3.27	2.50	24%
AVERAGE TOTAL HOURS PER WEEK		50.9	40.0	21%
% AVERAGE TIME SPENT IN MEETINGS		37.4%	50%	-34%
% AVERAGE MEETING EFFECTIVENESS		60.2%	80%	33%



% = Need or Potential Benefits, Color Code

High	Medium	Low
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Effectiveness and Overload Gauge, Potential Improvement Estimates

Note: (A) = Average score your participants' input, (B) = Average score our clients post training & coaching
(%) = Potential improvement

POTENTIAL BENEFITS

CONSOLIDATED REPORT - Project Codes:

XR208, XR608

Team Leaders

(A)= Team input (B) Benchmark (%)
Potential Benefit.

10

<< # Surveys Received

On a 5 point scale do you agree with the following statement?		(A)	(B)	(%)
1	I have no control over the amount of my voice mail, e-mail, meetings, and interruptions	3.80	2.57	32%
2	People place urgent demands on my life.	3.90	2.94	25%
3	My roles and responsibilities cover many subjects and are hard to classify.	3.90	2.32	41%
4	At work I do not feel equipped and empowered to be the best I can be and do what I love to do.	3.40	2.42	29%
5	I often give up my personal life in order to keep up with all I have to do.	3.20	2.97	7%
6	I do not have written personal goals that relate to my personal and corporate roles.	3.30	2.64	20%
7	I treat all people equally ; it is hard for me to define who is more important.	3.40	2.13	37%
Sub -Total: Filtering System Score		3.60	2.57	29%
8	By end of day, my e-mail in box usually has more than 10 items .	3.50	2.57	27%
9	At the end of most days I have voice mail to which I should have responded.	2.80	2.94	-5%
10	I feel guilty if I have not responded to my calls.	4.20	2.32	45%
11	On an average 70% of the time spent in meetings is unproductive.	3.10	2.57	17%
12	I find taking notes in meetings stressful.	1.80	2.94	-63%
13	I get too many unscheduled meetings or interruptions per day.	4.30	2.32	46%
14	My in basket/inbox usually has material that are more than 2 days old .	3.80	2.72	28%
Sub -Total: Input System Score		3.50	2.46	30%
15	I feel I need more workspace .	1.90	2.57	-35%
16	More than 70% of my desk is often covered by papers.	2.40	2.94	-23%
17	It takes me more than one minute to find an important document in my paper files	2.80	2.32	17%
18	It would take my associates more than three minutes to find an important document in my filing system .	2.80	2.57	8%
19	It would take me more than 30 seconds to find an item in my electronic or e-mail files .	2.90	2.94	-1%
20	I am often behind on my reading . This bothers me.	3.50	2.32	34%
Sub -Total: Filing System Score		2.95	2.37	20%
AVERAGE TOTAL OVERLOAD SCORES		3.50	2.50	29%
AVERAGE TOTAL HOURS PER WEEK		48.5	37.0	24%
% AVERAGE TIME SPENT IN MEETINGS		35.0%	40%	-14%
% AVERAGE MEETING EFFECTIVENESS		55.5%	75%	35%

% = Need or Potential Benefits, Color Code

High

Medium

Low

Effectiveness and Overload Gauge, Potential Improvement Estimates

Note: (A) = Average score your participants' input, (B) = Average score our clients post training & coaching
(%) = Potential improvement

POTENTIAL BENEFITS CONSOLIDATED REPORT - Project Codes: XRX208, XRX608		Staff		
		(A)= Team input (B) Benchmark (%) Potential Benefit.		
		10	<< # Surveys Received	
On a 5 point scale do you agree with the following statement?		(A)	(B)	(%)
1	I have no control over the amount of my voice mail, e-mail, meetings, and interruptions	4.00	2.57	36%
2	People place urgent demands on my life.	3.70	2.94	21%
3	My roles and responsibilities cover many subjects and are hard to classify.	3.90	2.32	41%
4	At work I do not feel equipped and empowered to be the best I can be and do what I love to do.	3.40	2.42	29%
5	I often give up my personal life in order to keep up with all I have to do.	3.40	2.97	13%
6	I do not have written personal goals that relate to my personal and corporate roles.	3.10	2.64	15%
7	I treat all people equally ; it is hard for me to define who is more important.	3.30	2.13	35%
Sub -Total: Filtering System Score		3.54	2.57	27%
8	By end of day, my e-mail in box usually has more than 10 items .	3.50	2.57	27%
9	At the end of most days I have voice mail to which I should have responded.	2.40	2.94	-23%
10	I feel guilty if I have not responded to my calls.	4.00	2.32	42%
11	On an average 70% of the time spent in meetings is unproductive.	3.30	2.57	22%
12	I find taking notes in meetings stressful.	1.90	2.94	-55%
13	I get too many unscheduled meetings or interruptions per day.	4.20	2.32	45%
14	My in basket/inbox usually has material that are more than 2 days old .	3.30	2.72	18%
Sub -Total: Input System Score		3.23	2.46	24%
15	I feel I need more workspace .	1.70	2.57	-51%
16	More than 70% of my desk is often covered by papers.	2.40	2.94	-23%
17	It takes me more than one minute to find an important document in my paper files	2.40	2.32	3%
18	It would take my associates more than three minutes to find an important document in my filing system .	2.60	2.57	1%
19	It would take me more than 30 seconds to find an item in my electronic or e-mail files .	2.70	2.94	-9%
20	I am often behind on my reading . This bothers me.	3.30	2.32	30%
Sub -Total: Filing System Score		2.52	2.37	6%
AVERAGE TOTAL OVERLOAD SCORES		3.12	2.50	20%
AVERAGE TOTAL HOURS PER WEEK		47.6	38.0	20%
% AVERAGE TIME SPENT IN MEETINGS		26.3%	40%	-52%
% AVERAGE MEETING EFFECTIVENESS		68.2%	80%	17%

% = Need or Potential Benefits, Color Code

High	Medium	Low
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