

MILESTONES



Management Inventory & Leadership Evaluation: Starting the Organization on New Experiences for Success

Financial audits help ensure your financial information is valid and can be relied on for decision making. Financial controls instill confidence in management to guide the organization. Another important control classification is behavioral control, which focuses on the human side of your business. Your organization's ability to guide and control worker behavior and to develop and foster a healthy culture is equally critical.

- ▶ Identify strengths of your strategic plan
- ▶ Assess return on management
- ▶ Identify relationship between culture & performance
- ▶ Develop departmental scorecards
- ▶ Increase focus on critical success indicators
- ▶ Improve individual & team performance
- ▶ Identify training & education opportunities

BKD Can Help

BKD recognizes organizational dynamics are complex; that the health of the leadership, management and culture are inextricably linked to the long-term financial success of the organization; and that many organizations have not given adequate attention to the human side of business.

BKD's MILESTONES solutions provide an independent review of these elements and dynamics for organizations. Our expertise as a CPA firm, coupled with the expertise of our organizational development specialists (ODS) and strategy specialists, offers clients a unique service that integrates business, leadership, managerial and cultural perspectives.

- Lack of or vague strategic plan
- Flat or negative trends in profitability and productivity
- Lack of defined critical success indicators (CSI)
- Presence of CSI, but flat or trending negatively
- Poor integration/communication between departments
- High employee and/or management turnover
- Lack of team cohesiveness
- Flat or decreasing market share
- Increasing constituency (employees, customers, board members) concerns/complaints

Is MILESTONES for You?

If your organization has experienced the following, then, yes, MILESTONES is for you:

- Recent senior leadership change
- Managers with no formal management training
- No recent independent organizational assessment

Service Delivery (Phase I)

From a focused engagement on a particular department or manager to an expanded engagement across the whole organization, BKD can tailor MILESTONES to meet your needs. We begin with a review of the strategic business plan and a systematic collection of information through a survey and interview process.



Strength in:

- Management
- Leadership
- Culture

Improved:

- Individual performance
- Team performance
- Quality & customer satisfaction

Increased:

- Market share
- Profitability

“BKD’s organizational development team was instrumental in assisting our team in critically analyzing one of our niche services and served to guide the change process that solidified the relationship with a major payer source.”

—Bill Wagner, *Executive Director*
Family Health Centers, Inc., Louisville, Kentucky

Strategic Business Plan - BKD’s ODS can review your organization’s business plan to identify your:

- Mission, vision and values
- Internal and external environmental factors
- Strengths, weaknesses, opportunities and threats
- Major lines of business
- Critical success indicators and trending

Survey & Interview Process - The survey and interview process helps unveil the elements and reinforcers of organizational culture and the potential impact on the organizational effectiveness. Common respondents to the surveys and interviews include:

- Organizational leader
- Line managers
- Employees
- Board members
- Suppliers
- Customers

A 360° (multirater) survey allows leaders and managers to receive feedback from their boss, peers and subordinates to gain a more realistic view of how their leadership style and skills are perceived.

Change Agents (Phase 2)

After completion of an evaluation, your organization can identify the changes it chooses to adopt. Often change does not come easily for organizations, particularly changes that penetrate to their

core. At the request of the client, BKD can serve as a facilitator to help your organization in the change process.

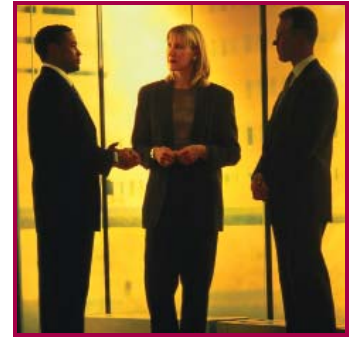
Follow-up (Phase 3)

After the change implementation phase, organizations will want to measure the impact of the change of the behavioral and business outcomes. If you request it, BKD can provide this service.

Questions MILESTONES Answers

MILESTONES can help answer some or all of the following questions across the organization or in a specific area (department):

- Are the mission, values and vision clear and well communicated?
- What are the major critical success indicators and how are they trending?
- What are the gaps between actual performance and desired performance?
- What is the level of satisfaction with the major constituencies?
- Are the modes and style of communication effective?
- What is the relationship of the culture-to-business outcomes?
- Is the environment conducive to creativity and innovation?
- Are employees’ strengths in alignment with their duties and responsibilities?
- How can leaders and managers promote improved organizational performance?



Beyond Your Numbers

BKD would like to take you beyond your numbers by applying our technical expertise, unmatched client service and disciplined delivery of solutions to your management and financial needs. We are committed to delivering results with integrity: solutions that are unquestionably ethical while also practical, timely and affordable. Let us take you beyond your numbers.



For a complete list of our offices and subsidiaries and their contacts, visit:

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