

**Intentional Analysis:
A Comprehensive and Appreciative Model
For the Evaluation of Organizational Coaching**

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I propose that evaluation reports can best be systematically reviewed and integrated by deploying a process called Intentional Analysis. I further recommend a twelve-step process that enables the leaders and stakeholders of an organization to be thoughtful about the relative importance associated with specific organizational coaching program initiatives—especially as related to other initiatives being taken by the organization. An Intentional Analysis also enables leaders and stakeholders to give simultaneous consideration to three other factors. It incorporates consideration of the relative influence and control the organization has over the desired outcomes of each initiative, the level of support in their organization for each initiative, and the progress made to date in achieving the desired outcomes associated with each initiative.

A successful Intentional Analysis encourages an appreciative perspective regarding the complex dynamics that operate within and among the program initiatives being evaluated and analyzed. An Intentional Analysis enables those making decisions regarding an organizational coaching program to incorporate and inter-relate this complex and dynamic set of considerations into their decision-making processes without being overwhelmed by this complexity. As Michael Scriven has noted, all evaluation processes are involved in the business of reducing complex data: “evaluation does reduce a large volume of information about various matters to a tiny kernel.” Intentional Analysis moves a step beyond Scriven in that it integrates the distilled evaluation data with the distillation of additional program considerations, thereby moving even further into the data-reduction business.

I will briefly describe each of the twelve steps in the Intentional Analysis process and introduce a hypothetical analysis as a means of concretely illustrating how an intentional analysis is conducted. We will assume that an advisory committee to an organizational coaching program is conducting an Intentional Analysis as a way to not only assess the impact of this program to date but also to map out future directions for this program, especially as it relates to other initiatives being taken by this organization—in other words, engaging in systemic analysis of the organizational coaching program within its institutional context.

Step One: Identification of the Initiatives to be Analyzed

This first step in the Intentional Analysis is typically not hard to complete. Most Intentional Analyses include at least five or six initiatives and may include as many as twenty initiatives. The hypothetical example we are using includes only six initiatives. We have kept the list short in order to exemplify the process without burdening the reader with too much detail.

We are using the generic term *initiative* to capture a wide variety of activities that operate in and around an organizational coaching program. The initiatives can be program units (such as departments or project teams) or specific programmatic activities that cut across several different departments or teams, such as an organization-wide quality control project or customer service improvement venture. The initiatives can also be components of a tactical or strategic planning process or components of a wish list that have been generated through some visioning process (such as *Future Search*).

In many cases, the list of initiatives to be considered in an Intentional Analysis is a mixed bag. This is perfectly acceptable, for an Intentional Analysis is quite robust with regard to working with initiatives of differing type and level. The one critical qualification or limitation concerns the scope of the initiative. If the initiative is too broad in scope (such as improvement in the overall functioning of the organization, or increasing organizational profitability) then the Intentional Analysis will lack precision and few comparisons can be made between several different initiatives. Conversely, if the scope is too limited (such as the performance of a specific employee or the production of a single newsletter or newspaper advertisement), then the Intentional Analysis will yield results that are either trivial or overly personal. Initiatives can be identified that exist virtually anywhere between these two extremes.

In our hypothetical example, we will focus on a semi-conductor company located in the San Francisco Bay Area—which we will call the Nu-Cor Corporation. The six initiatives that are being analyzed include: (1) marketing of a new organizational coaching service being offered inside Nu-Cor that focuses on first-line supervisors, (2) a major leadership development academy at Nu-Cor, in which participants have the option to engage a trained peer-coach who has already been through this academy, (3) introduction of a new web-based system for accessing information about Nu-Cor policies and procedures as well as various learning and coaching services that are available to employees at all levels of Nu-Cor, (4) peer coach training of high performance Nu-Cor employees who have been through the leadership development academy, (5) contracting with a national consulting firm for organizational coaching services for the senior level managers and executive leaders at Nu-Cor, and (6) participating in a new Bay Area coaching consortium, involving other major corporations that are making use of organizational coaching services (including the sharing of some training services for peer coaches, as well as “best practice” coaching strategies).

Step Two: Determination of the Potential Benefit of Each Initiative

Having identified the initiatives, the next step is to determine the extent to which each of these initiatives, if successful, will be of immediate benefit to the organization, regardless of the impact that each initiative might have on other elements of the organization. Will this initiative provide immediate financial benefit (Return on Investment)? Might this initiative produce a boost in morale or might it increase the prestige or visibility of this organization? Does this initiative increase sales or rates of production?

In some cases, consideration is only given to the benefits irrespective of any costs associated with realizing these benefits. In other cases, benefits are linked directly with costs. As Carol Weiss has suggested, cost-benefit analyses are logical extensions beyond program evaluation. Results from a comprehensive program evaluation can typically yield information about both the benefits of a program and many of its costs (both anticipated and unanticipated, both obvious and hidden). If cost/benefit analyses are conducted at this second step, then the cost-effectiveness of the program becomes the key factor in determining the potential value of each initiative for this organization. However, there is no need to introduce cost factors at this point, for these financial considerations come back into the Intentional Analysis at Step Seven, when levels of organizational support are being considered. A

cost/benefit analysis that yields a rating of cost-effectiveness is only needed if cost considerations are particularly important. This might be the case in an organization that is financially-strapped or in a government or nonprofit organization that is being carefully monitored by key stakeholders with regard to both costs and benefits.

Analyses of benefits can also be differentiated with regard to the dimension of time. The analysis can focus on short-term benefits or on long-term benefits; however, this type of differentiation need not be enacted. There are other ways in which the Intentional Analysis takes into account the time factor. The final three steps are particularly focused on the dimension of time. It is advisable at this early stage in the Intentional Analysis process to set aside the issue of time and simply indicate the extent to which this initiative will ultimately benefit the organization, whether this will be tomorrow or five years from now.

This second step can involve very intricate and time-consuming assessments. Organizations have often formulated complex cost-benefit processes for assigning financial value to an initiative or for determining the extent to which a specific initiative holds potential for impacting on desired performance standards or quality criteria for an organization. While these complex processes can be of great value, we propose that a much simpler process be initially engaged. More elaborate processes can be formulated once the leaders and stakeholders of an organization have gained experience in engaging the entire Intentional Analysis process. We specifically suggest the assignment of numerical values to each initiative.

The assignment of a numerical value can follow one of two paths. One hundred points can be divided up among each of the initiatives being analyzed. The initiatives that potentially can yield the greatest benefit receive the largest portion of these 100 points, and those potentially yielding the least benefits receive the fewest points. This method forces one to make choices between several initiatives as to the extent in which each initiative is likely to be beneficial. Alternatively, one can simply use a ten point system, with 8, 9 or 10 points being assigned to those initiatives that hold greatest potential of being beneficial, and those with least potential receiving 1, 2, or 3 points.

In the hypothetical case we are presenting, we will assume that the first method is being used. The organizational coaching advisory committee meets together to assign points with regard to the benefit

potential for each of the six initiatives. They primarily focus on the potential benefits to Nu-Cor in terms of increased managerial effectiveness (as determined by employee morale, tangible signs of increased productivity and reduced employee resignations). The following points are assigned to each initiative (totally 100 points)

- (1) marketing of a *new organizational coaching service* being offered inside Nu-Cor that focuses on first-line supervisors [20 points]**
- (2) *leadership development academy* at Nu-Cor, in which participants have the option to engage a trained peer-coach who has already been through this academy [10 points]**
- (3) *new web-based system for accessing information* about Nu-Cor policies and procedures as well as learning and coaching services [20 points]**
- (4) *peer coach training* of high performance employees who have been through the leadership development academy [10 points]**
- (5) contracting with a *national consulting firm* for organizational coaching services for the senior level managers and executive leaders at Nu-Cor [25 points]**
- (6) participating in a new *Bay Area coaching consortium*, involving other major corporations that are making use of organizational coaching services [15 point]**

The organizational coaching advisory committee (having conferred with many other leaders of the organization) concludes that the national consulting firm contract would yield the greatest benefits in terms of increased managerial effectiveness with specific reference to tangible evidence of increased productivity, while the new web-services system would yield the greatest improvement in managerial effectiveness with regard to their other two criteria of managerial effectiveness (employee morale and reduced employee resignations).

Step Three: Determination of the Potential Enablement of Each Initiative

There is a second way of assessing the value of any initiative being taken in an organization that is often overlooked, yet it is critical to any appreciative and systematic evaluation of an organization. The

benefit to be derived from any one initiative should never be assessed in isolation; rather the indirect benefits that this initiative might produce should always be assessed. One must determine or at least estimate the extent to which this initiative, if successful, will increase the possibility that other initiatives being considered are also likely to be successful. In other words, to what extent does this initiative enable other initiatives?

In making this assessment, one can employ a formal cross-impact analysis, determining the extent to which each initiative enables each of the other initiatives. One can also be more informal, and make a general assessment regarding the extent of enablement, using a 1 to 10 scale. A score of 1 would suggest that this initiative probably has minimal impact on the other initiatives, even if it is successful. One might assign a 1 if the impact could even be negative: success of this initiative reduces the chances that other initiatives are successful. A score of 4, 5, or 6 would be assigned if this initiative does influence the success of the other initiatives, while a score of 8, 9 or 10 suggests that this initiative is intimately related to the success of the other initiatives. Low scores indicate isolation and disengagement of initiatives, while high scores indicate high levels of interdependence.

In our hypothetical shoe store, the organizational coaching advisory committee comes to the following conclusions regarding enablement:

- (1) marketing of a *new organizational coaching service* for first-line supervisors [2 points]**
- (2) *leadership development academy* with trained peer-coach [7 points]**
- (3) *web-based system for accessing information* about policies and procedures and services [8 points]**
- (4) training of high performance employees as *peer coaches* [9 points]**
- (5) contracting with *national consulting firm* for organizational coaching to senior managers and leaders [3 points]**
- (6) participating in a new *Bay Area coaching consortium* [7 point]**

The organizational coaching advisory committee determines that the training of peer coaches and new web based system would enable most of the other initiatives to be more successful. For example, the peer coaches will work with participants in the leadership development academy and will themselves, as high performance employees, be more effective in their own leadership, as well as potentially participating in the new Bay Area coaching consortium. Similarly, the web bases system makes information about the other initiatives more accessible to all Nu-Cor employees.

Step Four: Determination of the Importance of Each Initiative

This next step involves simple arithmetic calculations. The score assigned to the potential benefit of each initiative is multiplied by the enablement score assigned to each initiative. Thus, in this model, importance is defined as a combination of direct and indirect potential benefits to the organization. This definition enables us to think more broadly about the benefits that can accrue to an organization; this broader analysis leads us to a more insightful evaluation of program outcomes.

Table One: Determining Importance [Hypothetical Case]

<i>Initiative</i>	<i>Column One Potential Benefit (Total of 100 Pts)</i>	<i>Column Two Enablement (Range:1 to 10 Pts)</i>	<i>Column Three Importance (Col 1 * Col 2)</i>
1. Marketing Of Org Coaching Program	20	2	40
2. Leadership Development Academy	10	7	70
3. Web-Based Information Access	20	8	160
4. Training of Peer Coaches	10	9	90
5. Contracting with Nat'l Consulting Firm	25	3	75
6. Bay Area Coaching Consortium	15	7	105
Total Number Of Points	100		

The organizational coaching advisory committee at Nu-Cor completes their calculations (see Table One). In this initial analysis, it is quite clear that the web-based system for accessing information stands

out as being of greatest importance. It is important in and of itself, in terms of yielding potential benefit to the organization; it also enables many of the other initiatives to be potentially more successful. The Bay Area coaching consortium seems to be next most important, with the training of peer coaches being of third greatest importance, in large part because it enables other initiatives to succeed.

Step Five: Assessment of the Locus of Control for Each Initiative

When we engage in a new venture there is always some extent to which the success of that venture is outside our control. We can't force potential clients to make effective use of coaching services nor can we enforce policy with regard to the creation of an appreciative culture in our organization. In some cases, we have considerable control over the relative success or failure of any one initiative. The locus of control for this initiative is identified as internal. In other cases, we have very little control, let alone influence, over the success of an initiative and in these instances the locus of control is identified as external.

It is critical that any person or group comes to fully appreciate the relative internal or external locus of control with regard to any initiative when analyzing the results of an outcome determining evaluation of this initiative. To what extent did those responsible for this initiative really have much control over its outcome? Were extrinsic forces largely responsible for the success or failure? If they were, then responsibility must be reassessed and future program planning must take into account this external locus. Was this initiative largely in the hands of those responsible? If there was an internal locus of control, then the outcome-determining evaluation is perfectly appropriate and there need be no adjustment of the resulting analysis.

The assessment of internal and external locus of control for each initiative is also critical because many people are predisposed toward either internal or external locus of control. Some of us tend to assume that every person is ultimately responsible for their own life as well as the success or failure of projects in which they are involved. In other cases, we find people who hold a strong external locus of control bias. They assume that everything is ultimately in the hands of God or some other external entity, or they are quite pessimistic about the ability of any one person to ultimately make a difference in their organization or in the world at large. Obviously, neither extreme captures the reality of contemporary

organizational life. We must insure that a fair assessment is made of the relative locus of control for each initiative we are evaluating.

The simplest way in which to do this assessment is by assigning each initiative a number from one to ten. The number “1” would represent absolutely no control or influence over and, as a result, no responsibility for the outcome of the initiative (external locus of control), while the number “10” would represent absolutely full control over and responsibility for the outcome of the initiative (internal locus of control). The organizational coaching advisory committee in our hypothetical high tech organization arrives at the following conclusions with regard to the locus of control for each of their six initiatives:

- (1) marketing of a *new organizational coaching service* for first-line supervisors [6 points]**
- (2) *leadership development academy* with trained peer-coach [10 points]**
- (3) *web-based system for accessing information about policies and procedures and services* [8 points]**
- (4) training of high performance employees as *peer coaches* [9 points]**
- (5) contracting with *national consulting firm* for organizational coaching to senior managers and leaders [3 points]**
- (6) participating in a new *Bay Area coaching consortium* [3 point]**

They concludes that they have complete control over the rearrangement of the leadership development academy (the funds have already been allocated) and virtually complete control over their training program for peer coaches. External locus of control is found to be more prevalent with regard to their contracting with the national consulting firm and helping to build the Bay Area coaching consortium. These latter initiatives obviously involve the formation of business relationships with organizations that operate independent of the Nu-Cor corporation. It is important that locus of control is kept in mind when the Nu-Cor advisory committee is reviewing the evaluations made of these six initiatives and when making future plans. Some things can be controlled or at least predicted; other things can't be either predicted or controlled.

Step Six: Determination of Saliency for Each Initiative

This step, like Step Four, involves a mathematical calculation. The importance score (step four) for each initiative is multiplied by the locus of control score (step five) to determine the *saliency* for each initiative. The term saliency is used because it refers to the extent to which something stands out from the ordinary. We find that saliency scores often have this effect: they are often surprising and informative. They suggest dimensions of an organization that should be given particular attention, for high saliency scores suggest that this initiative is not only important but also something over which those working inside the organization have significant influence or even control (internal locus of control). It is these high saliency items that should be given the greatest attention when reviewing the results of an outcome determining evaluation. In fact, some organizations actually perform these first six steps of the Intentional Analysis before engaging in an outcome determination evaluation, so that this evaluation might be focused on those initiatives that possess the greatest saliency for the organization.

We turn once again to the Nu-Cor Corporation to illustrate how this sixth step is engaged (see Table Two). When reviewing this second table, members of the organizational coaching advisory committee are impressed with the saliency of the web-based information initiative (Saliency=1280). They are not very surprised with this score, given the central role that this new system is likely to play in Nu-Cor. This high score is reassuring, however, in that this new initiative requires a major expenditure of technical time and money.

The next highest scores come as something of a surprise: training of peer coaches (Saliency=810) and the Leadership Development Academy (Saliency=700). They haven't given either initiative much attention, yet after the high saliency scores are identified, these two initiatives suddenly solicit more attention. They now stand out as both important and subject to considerable internal influence and control. Furthermore, as members of the advisory committee begin to talk more about these two initiatives, they more fully appreciate both of them in terms of their potentially positive impact on the morale of their employees and the positive image these initiatives might bring to the overall ambience of the organization. It is often the case when locus of control is introduced in an Intentional Analysis that the less spectacular initiatives, that are inevitably more domestic (internal locus of control), are fully

appreciated and given increased attention in analyzing an evaluation report or preparing a tactical or strategic plan for the organization.

Table Two: Determining Salience [Hypothetical Case]

<i>Initiative</i>	<i>Column One</i> <i>Potential Benefit</i> (Total of 100 Pts)	<i>Column Two</i> <i>Enablement</i> (Range: 1 to 10 Pts)	<i>Column Three</i> <i>Importance</i> (Col 1 Times Col 2)	<i>Column Four</i> <i>Locus Of Control</i> (Range 1 to 10 Pts)	<i>Column Five</i> <i>Salience</i> (Col 3 Times Col 4)
1. Marketing Of Org Coaching Program	20	2	40	6	240
2. Leadership Develop Academy	10	7	70	10	700
3. Web-Based Information Access	20	8	160	8	1280
4. Training of Peer Coaches	10	9	90	9	810
5. Contracting with Nat'l Consult Firm	25	3	75	3	225
6. Bay Area Coaching Consortium	15	7	105	3	315

Step Seven: Assessment of Organizational Support for Each Initiative

This seventh step often evokes considerable frustration and even anger, especially among members of an organization who are inclined toward vision and risk and are intolerant of the internal politics of their organization. During this step an honest appraisal must be made of the support each initiative has in the organization. To what extent are various constituencies in this organization willing to assist in making this initiative successful? What about the key stakeholders in the organization: are they behind this initiative, or are they neutral or even resistant? This is also the step when the dimension of cost is brought into the picture. How much will this initiative cost in terms of money, time, space and other valued (and often scarce) resources of the organization?

In our description of Step Two, we mentioned that a cost/benefit and cost-effectiveness analysis could be deferred because the cost side of the equation will be brought to bear later in the Intentional Analysis. This is the point, during Step Seven, when attention must turn to cost. If costs are particularly important, then the seventh step might even be broken into two sub-steps, with a cost rating being separated from a rating of overall organizational support. We have included cost as part of the organizational support factor because the most tangible manifestation of organizational support is usually the willingness of an organization to meet the financial, temporal and spatial obligations—that is costs—associated with an initiative.

In many ways, this seventh step resembles the fifth in that we are returning to an assessment and fuller appreciation of influence and control. In this case, however, the assessment and appreciation is focused exclusively on internal affairs. The leaders of an organization might have absolute control over the success or failure of a specific initiative, yet they may find ambivalence within their own organization about the desirability of this initiative. Even if there is verbal support, an assessment must be made of more tangible support. Are there sufficient resources (people, expertise, technology, time, space) in this organization to sustain this initiative? Will any impending events or demands distract resources from this initiative?

The assessment of enablement that was made in Step Three might prove to be of value at this point. Are any of the other initiatives likely to be enabling of this initiative? Are any of the other initiatives likely to detract from or hinder this initiative? Unfortunately, many innovators and visionaries within contemporary organizations tend to work in isolation. They do not often meet with other innovators or visionaries in the organization to coordinate efforts or focus on mutual enablement. Thus, this seventh step is important when setting the stage for a fair assessment of any program evaluation process that focuses on outcomes. As in most of the other steps, a simple ten-point scale can be used to indicate the extent of organizational support for each initiative. A score of “1” indicates that there is no support, or even active opposition, with regard to this specific initiative. A score of “10” suggests that everyone is supportive and that there are ample resources to sustain this initiative.

When members of the organizational coaching advisory committee at Nu-Cor assessed organizational support for their six initiatives, they find that they do not have sufficient information. They decide to

talk with other employees about each initiative. They learn much more about employee support and deployment of resources in their organization. This type of conversation has rarely occurred at Nu-Cor (or for that matter in many real-world organizations). For all organizations, both big and small, each step in the Intentional Analysis process can provide rich insights for those who must evaluate and lead specific initiatives (such as organizational coaching) in the organization.

The following ratings are assigned to each of the six Nu-Cor initiatives:

- (1) marketing of a *new organizational coaching service* for first-line supervisors [6 points]**
- (2) *leadership development academy with trained peer-coach* [9 points]**
- (3) *web-based system for accessing information about policies and procedures and services* [4 points]**
- (4) training of high performance employees as *peer coaches* [8 points]**
- (5) contracting with *national consulting firm* for organizational coaching to senior managers and leaders [6 points]**
- (6) participating in a new *Bay Area coaching consortium* [2 points]**

After interviewing their fellow Nu-Cor employees the advisory committee concludes that there is considerable enthusiasm for the Leadership Development Academy, and for the program that trains peer coaches. Committee members are surprised to discover considerable ambivalence regarding the new web-based information system. Despite the fact that Nu-Cor is a high-tech firm, some of the employees are computer-phobic, while others had heard many horror stories about other organizations that have messed everything up for their employees with regard to information about organizational policies and procedures when they introduced a new web-based system for storing and displaying this information. The committee also finds little support for the Bay Area consortium, but does find considerable support and enthusiasm with regard to the contract with national consulting firm for work with the high level executives at Nu-Cor (“yah, those men and women could use some help!”).

Step Eight: Determine the Feasibility of Each Initiative

The eighth step is again a calculation. The feasibility of each initiative is defined as the interplay between the salience of the initiative and the amount of support this initiative will receive in the organization. To determine a Feasibility score for each initiative, the salience score for this initiative is multiplied times the Organizational Support score for this initiative. Table Three contains the Feasibility scores for our hypothetical organization (Nu-Cor).

Table Three: Determining Feasibility [Hypothetical Case]

<i>Initiative</i>	<i>Column One Potential Benefit (Total of 100 Pts)</i>	<i>Column Two Enable- ment (Range: 1 to 10 Pts)</i>	<i>Column Three Importance (Col 1 Times Col 2)</i>	<i>Column Four Locus Of Control (Range 1 to 10 Pts)</i>	<i>Column Five Salience (Col 3 Times Col 4)</i>	<i>Column Six Organiza- tional Support (Range: 1 to 10 Pts.)</i>	<i>Column Seven Feasi- bility (Col 5 Times Col 6)</i>
1. Marketing Of Org Coaching Program	20	2	40	6	240	6	1440
2. Leadership Develop Academy	10	7	70	10	700	9	6300
3. Web-Based Information Access	20	8	160	8	1280	4	5120
4. Training of Peer Coaches	10	9	90	9	810	8	5680
5. Contracting with Nat'l Consult Firm .	25	3	75	3	225	6	1350
6. Bay Area Coaching Consortium	15	7	105	3	315	2	630
Total Number Of Points	100						

As in the case of the salience scores, the results from the feasibility calculations comes as something of a surprise to members of the Nu-Cor advisory committee. They find further support for the two sometimes-neglected initiatives (Leadership Development Academy and peer coach training program) and come to the difficult conclusion that the web-based information system is highly salient, yet not as feasible as the two neglected initiatives. They come to realize that the specific evaluation of the web-based information system is going to be very important and that they should give further attention to

both the specific marketing of the organizational coaching program for first line supervisors and national consulting firm contract. The Bay Area coaching consortium initiative seems not to be feasible.

Step Nine: Evaluate the Progress to Date Regarding Each Initiative

This is the point where the data gathered in an evaluation that focuses on the determination of outcomes come directly to play in the Intentional Analysis. Making use of the evaluation data, those doing the Intentional Analysis are to assess the extent to which progress has made at this point toward the desired outcomes associated with each initiative. Typically, a ten-point scale is engaged in this process, just as it has been used in most of the other steps of the Intentional Analysis.

A score of “1” indicates that no progress has been made. This initiative is still at the starting line and little if any actions have been taken to realize the desired outcomes associated with this initiative. A score of “10” indicates that this initiative is completed and that the desired outcomes have all been fully realized. One might make use of a sports metaphor in assigning scores to each initiative. Imagine a football field with each 10 yards representing one point. If a specific initiative is a long way from completion then you might imagine it is located on the other team’s 10 or 20 yard line. If the initiative is at mid-field, then a score of 5 might be assigned. If a touchdown is eminent, then a score of 7, 8 or 9 might be appropriate. Ten points represents a “touchdown!”

For the organizational coaching advisory committee at Nu-Cor, the task of assigning progress scores to each initiative is difficult but it is also eagerly anticipated since members of the committee have been anxious to process the evaluation report they have already received. The report that they have already received indicates that considerable work has already been done in designing and preparing for the Leadership Development Academy. Those who have done work on this academy are eager to implement their plan. The report also indicates that the peer coach training program is firmly established, though this program apparently needs significant improvements in terms of both content and process. Thus a high progress score is assigned to the Leadership Development initiative (Progress=8), while a somewhat lower scores is assigned to the peer coach training initiative (Progress=6).

According to the evaluators, the web-based information initiative is filled with problems, leading the advisory committee to assign it a low progress score (Progress=3). Members of this committee are pleased to read the evaluation team's conclusions (based on needs analyses) that Nu-Cor employees would positively receive the organizational coaching program for first line supervisors and would welcome the coaching of senior managers and leaders at Nu-Cor by members of the national consulting firm. They interpret employee interest in coaching (both for themselves and Nu-Cor leaders) as a sign of progress, even though no specific actions have been taken with regard to either initiative. The committee assigned a relatively high rating of progress to both the marketing of organizational coaching services (Progress=5) and the introduction of high level coaching for executive by the consulting firm (Progress=5). While the committee has already begun to reassess participation in the Bay Area coaching consortium, the evaluation report put the nail-in-the-coffin indicating that virtually no progress has been made regarding this initiative, nor does there appear to be much advantage in helping to build this consortium, given the evaluation team's survey of employee support for this consortium (Progress=1).

Following is a summary list of the progress scores assigned to each initiative:

- (1) marketing of a *new organizational coaching service* for first-line supervisors [5 points]**
- (2) *leadership development academy* with trained peer-coach [8 points]**
- (3) *web-based system for accessing information* about policies and procedures and services [3 points]**
- (4) training of high performance employees as *peer coaches* [6 points]**
- (5) contracting with *national consulting firm* for organizational coaching to senior managers and leaders [5 points]**
- (6) participating in a new *Bay Area coaching consortium* [1 point]**

The advisory committee is now ready to move to the final step in the Intentional Analysis process.

Step Ten: Identify Tactical (Short Term) Advantage for Each Initiative

This tenth step involves another simple calculation. The feasibility score for each initiative is multiplied by the progress score (Step Nine). The resulting product is called the *tactical advantage*. It represents the potential value of this initiative as part of the short-term, tactical planning program for this organization. In other words, when leaders of an organization are considering those initiatives that should receive the greatest amount of attention during the coming three to six months, they should give careful consideration to those initiatives that have the highest tactical advantage scores on the Intentional Analysis. These initiatives not only are feasible, they also are closest to being fully accomplished. Members of the organization are likely to feel more motivated and hopeful about the future if these initiatives are fully realized.

Table Four: Determining Tactical Advantage [Hypothetical Case]

Initiative	Column Three Importance (Col 1 Times Col 2)	Column Four Locus Of Control (Range: 1 to 10 Pts)	Column Five Salience (Col 3 Times Col 4)	Column Six Organization Support (Range: 1 to 10 Pts.)	Column Seven Feasibility (Col 5 Times Col 6)	Column Eight Progress (Range: 1 to 10 Pts)	Column Nine Tactical Advantage (Col 7 Times Col 8)
1. Marketing Of Org Coaching Program	40	6	240	6	1440	5	7200
2. Leadership Develop Academy	70	10	700	9	6300	8	50400
3. Web-Based Information Access	160	8	1280	4	5120	3	15360
4. Training of Peer Coaches	90	9	810	8	5680	6	34080
5. Contracting with Nat'l Consult Firm .	75	3	225	6	1350	5	6750
6. Bay Area Coaching Consortium	105	3	315	2	630	1	630

In the case of Nu-Cor, the calculations of tactical advantage scores reveal a few surprises (Table Four). Though you would think by this point in the analysis, there should be few surprises, these final steps typically do offer some new insights, while also tending to firm up resolve and provide further focus for future planning efforts. Members of the advisory committee are first surprised to see the extent to which the Leadership Development Academy and the peer coach training initiatives stand out as tactical advantages. Clearly these are immediate do-ables. Members of the committee also note that none of the other initiatives really make much of a case with regard to tactical planning. Each of the other initiatives has something working against it over the short term. It is only when the advisory committee moves to the eleventh step that the role to be played by the other initiatives becomes clear.

Step Eleven: Identify Strategic (Long Term) Advantages for Each Initiative

This final calculation parallels the tenth step calculation. The only difference is to be found in the use of the Progress Score (Step Nine). Rather than focusing on distance from the starting point, we focus on the distance of each initiative to the end point. This refocusing requires only that we subtract the Progress Score of Step Nine from “10” (the score to be assigned to a fully realized initiative). A Progress Score of “6” becomes “4” ($10-6=4$), while a score of “2” becomes “8” ($10-2=8$). A Progress Score of “5” will remain “5” ($10-5=5$). We are shifting from a focus on the glass-half-filled to a focus on the glass-half-empty. This, in turn, enables us to assess the long-term *strategic advantage* of each initiative.

In turning to our hypothetical example, members of the advisory committee at Nu-Cor discover in this strategic analysis that the web-based information initiative stands out as being of greatest importance. They also discover, however, that peer coach training continues to be important. The other initiatives are about equally weighted, when the Leadership Development initiative is set aside as a short-term project. A slightly higher score can be assigned to organizational coaching for first line supervisors, though this initiative certainly does not command the attention of committee members—as does the web-based information initiative. With this final set of scores, the stage is set for the organizational coaching advisory committee in our hypothetical high tech corporation to engage in an overall assessment of the six initiatives.

Table Five: Determining Strategic Advantage [Hypothetical Case]

Initiative	Column Four Locus Of Control (Range 1 to 10 Pts)	Column Five Salience (Col 3 Times Col 4)	Column Six Organization Support (Range: 1 to 10 Pts.)	Column Seven Feasibility (Col 5 Times Col 6)	Column Eight Progress (Range: 1 to 10 Pts.)	Column Eight-A Progress (10 Minus Col 8)	Column Ten Strategic Advantage (Col 7 Times Col 8-A)
1. Marketing Of Org Coaching Program	6	240	6	1440	5	5	7200
2. Leadership Develop Academy	10	700	9	6300	8	2	12600
3. Web-Based Information Access	8	1280	4	5120	3	7	35840
4. Training of Peer Coaches	9	810	8	5680	6	4	22720
5. Contracting with Nat'l Consult Firm .	3	225	6	1350	5	5	6750
6. Bay Area Coaching Consortium	3	315	2	630	1	9	5670

Step Twelve: Overall Assessment of Each Initiative

This final step of the Intentional Analysis process is elusively simple. One must only ask one question: So What? Having completed the first eleven steps in this intricate and appreciative process, what is to be done with the findings? Typically, as we noted with regard to steps ten and eleven, the results are applied to both short and long term planning for the organization. While the leaders of any organization should never take the Tactical Advantage and Strategic Advantage scores as absolutes, these scores provide a wonderful starting point for any thoughtful discussion about short and long term plans for the organization. After the identification of key tactical and strategic initiatives, we encourage a review of previous steps.

What about the assumptions and values underlying the assessment of potential benefits and enablement? Given the outcomes of this Intentional Analysis, do these first assessments still make sense? What about

locus of control? Is everyone confident, given the program evaluation that has been performed, that this assessment of control is valid? Do we really have as much or as little influence as we concluded with regard to the key incentives? The appreciative evaluation reports that have been prepared often inform us about organizational support for these key initiatives, especially if they include a diagnostic component. Have we taken the results of the evaluation reports fully into account when making our assessment of organizational support? Are we guilty of wishful thinking when providing high rating for the key initiatives?

Finally, what about our assessment of progress toward desired program outcomes? This assessment is particularly important given that it influences both the Tactical and the Strategic Advantage scores. Have we taken full account of results from any outcome determination evaluation reports that were prepared? Once again, we need to be careful about our vulnerability to wishful thinking, especially if a specific incentive is our pet project or if it has consistently appeared in previous planning ventures. We need to be open to surprise and must be careful about our biases if we intend for the intentional analysis to be meaningful and a guide for future decision-making in our organization.

Conclusions

The Intentional Analysis can yield additional benefits, provided time is devoted during this final step to the implications inherent in the scores obtained at each step. First, the Importance scores (Step Four: Benefit and Enablement) provide a valuable source of information regarding the core mission and values of the organization. Initiatives with high Importance scores should be aligned with the mission and values; if they are not, then leaders of the organization might wish to engage or reengage a planning process in order to re-visit the organization's mission and values.

Second, the Salience scores (Step Six: Importance and Locus Control) suggest something about the overarching vision of the organization. If highly important initiatives tend to be linked with external local of control, and initiatives of low importance tend to be those over which the organization has maximum influence and control, then something is wrong. The leaders of the organization may be too visionary, shooting for the stars when more earth-bound aspirations might be more appropriate. There might be an accompanying collusion between the leaders and followers regarding the selection of external locus initiatives. If we focus on projects over which we have little influence or control, then we

can't be held accountable. This type of collusion between visionary leaders and apathetic followers is all too common in contemporary organizations.

Third, we can turn to the Feasibility scores (Step Eight: Salience and Organizational Support) and find in this analysis something about the overall viability of our organization. Are we devoting our attention and resources to initiatives that can be successful or are the resources being devoted to activities that are unimportant or out of our control. The famous psychoanalyst, Erik Erikson, suggests that in the middle of our lives we have limited resources to devote to specific ventures. We come at midlife to recognition that there is finite time and finite energy. Faced with this life-altering insight, we must identify that which we care about and devote most of our limited resources to the task of taking care of that about which we care. In a similar manner, leaders of contemporary organizations come of age when they recognize that their organization has limited resources and that these resources must be devoted to that about which their organization truly cares.

We can't do everything, so must look to our Feasibility scores in order to determine if salience and organizational support are in alignment. If all of our Feasibility scores are low, then we must take a step backwards and reexamine the ways in which we assign importance to an incentive and the ways in which we build organizational support for this incentive. In many cases, low feasibility scores suggest that the leaders of the organization are introducing new initiatives without consulting with other employees or in a manner that yields very little interest or commitment on the part of other stakeholders in the organization. Employees and stakeholders are usually unwilling to devote time, money, expertise or energy to a project in which they have been minimally engaged when it is being planned and initially executed.

Finally, the Intentional Analysis can inform leaders of an organization about future needs for program evaluation and related feedback processes. What additional information would have been of value in completing this Intentional Analysis? Could a more detailed diagnostic evaluation have yielded useful information? How might the outcome-determination evaluation have been of greater value?

Organizational appreciation involves a full understanding of the complex dynamics that are operating within and upon an organization. An Intentional Analysis that is conducted in a thoughtful and systematic manner will yield organizational understanding. Furthermore, this appreciative understanding

will grow fuller and richer if the processes of Intentional Analysis, and the program evaluation activities that accompany this analysis, are subject to review and continuing improvement following each enactment of the Intentional Analysis.