



human energy

# Low-tech tools that capture high-value data

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# Agenda

## ODF April 4, 2022, Presentation

01		Operational Excellence (OE) moment – Perspectives
02		Chevron's Org Design Team
03		Organization design data
04		Using value chains to reveal information about the organization
05		Using Role Maps to reveal integration points
06		Tools for capturing qualitative data
<b>Closing</b>		

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**Thank you to Duyen and Tanya**

### Introduction

- Acknowledge - some great tools exist to facilitate decision-making through organization modeling for efficiency (cost) & effectiveness (to a limited degree).
- Tools require time and money (licensing; consultant fees; time to implement).
- This presentation is focused on a small set of tools that you can apply to enable a focused discussion with your clients (internal or external) and gather information about the organization (process, people capabilities, technology, governance, etc.).
- Data used to make high-quality decisions.
- Focus on applying 3 tools (value chains for a down and dirty review of work alignment, role maps to capture integration points and lateral connections, and data capture tools to analyze, track and decide on alternatives)

### Transition

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- Chevron Safety Culture
- Operational Excellence moments
- Safety Moments

## Ground rules



- Please be present & participate
- Feel free to ask questions as we go (use the raised-hand feature)
- Make your thinking visible
  - “Here’s is what I’m thinking....”
  - “Here is what I am struggling with....”
- Respectfully, help others make their thinking visible
  - "Can you say more about..."
  - "I wonder if...."



### Transition

- Supports Chevron’s strong Safety Culture (including environmental, physical, emotional, communal and assets).
- Operational Excellence moments highlight best practices and expectations
- Safety Moments highlight more technical safety issues related to keeping people safe (physically & emotionally), protecting the environment and protecting assets.

## Operational Excellence Moment



### First motion

Point to the ceiling with your finger raised high enough so that your elbow is at eye level.

### Next motion

As you point to the ceiling, rotate your hand clockwise and continue rotating it clockwise

### Last motion

As your finger rotates clockwise, slowly lower your elbow until your finger is below eye level.

Does your finger still appear to be rotating clockwise?

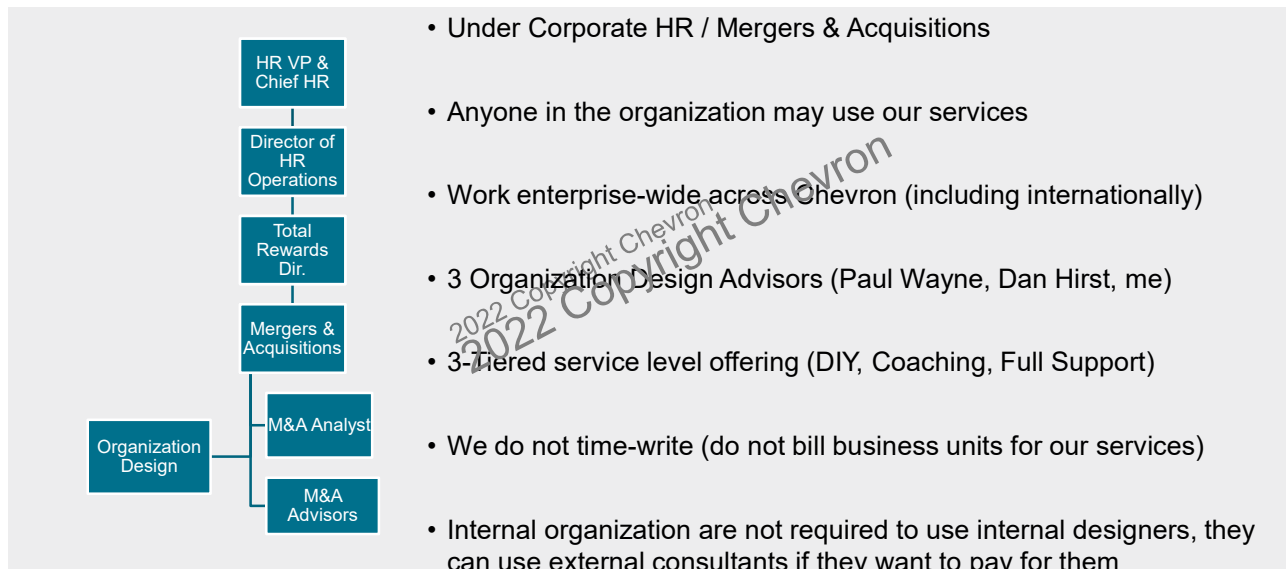
What Changed? +



### Key Point

- Use this OE moment in the initial meeting with new organization design project team.
- Establishes a different mental model
- Not jumping to sticks and boxes
- Organization design is often about helping teams or leaders to consider a different perspective
- What I will present today might be a different perspective from the one you currently hold

## where organization design resides in Chevron



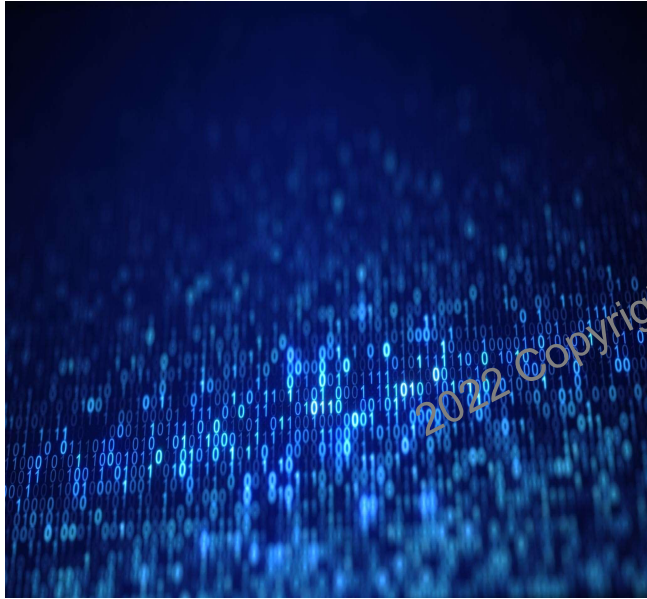
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Information is all on the slide

## What data do you capture in your organization design work?



Use your Zoom annotation feature to type your response below.

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### Introduction

- Some of the most valuable data we gather is revealed during our facilitated conversations with clients.
- The challenge is in how to capture this data for analysis and to assist in generating alternatives and in decision-making process
- Rupert Morrison (Founder and Deputy Chair of OrgVue, stated at last year's Organization Design Conference said: "Data-Driven Organization Design (D-DOD) is an ongoing and evolving process. You must be **adept at adapting.**"
- Org Designers need to be comfortable adapting our processes and methods as we engage our clients

### We know

Org design is not primarily about the sticks and boxes

That time and cost will remain as driving forces for our clients into the foreseeable future. We must continue to explore methods and tools that allow us to gain insights for activating the operating model as efficiently as possible.

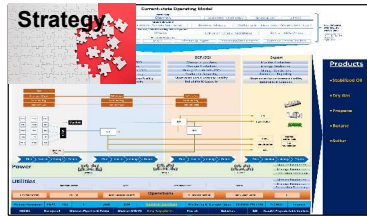
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# When time allows

## Journey towards detailed design

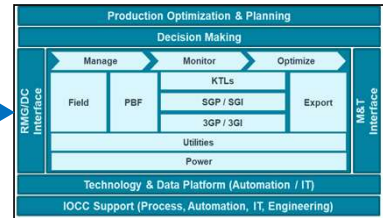
Capture the Current-state V.C. & Operating Model



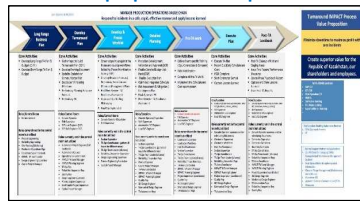
Create a role map of each value chain link



How work will enter, flow, decisions made...



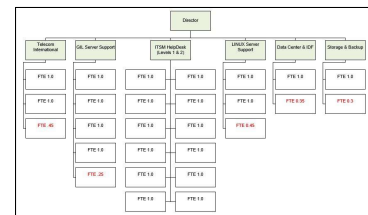
Articulate value propositions & capture value chains



Activity Analysis

Activity Job/Process or Milestone	Activity Description	Start	End	Category	Dependencies	Resources	Skills	Tools	Frequency	Priority	Impact
Activity 1	Activity 1 Description	Start	End	Category	Dependencies	Resources	Skills	Tools	Frequency	Priority	Impact
Activity 2	Activity 2 Description	Start	End	Category	Dependencies	Resources	Skills	Tools	Frequency	Priority	Impact
Activity 3	Activity 3 Description	Start	End	Category	Dependencies	Resources	Skills	Tools	Frequency	Priority	Impact
Activity 4	Activity 4 Description	Start	End	Category	Dependencies	Resources	Skills	Tools	Frequency	Priority	Impact
Activity 5	Activity 5 Description	Start	End	Category	Dependencies	Resources	Skills	Tools	Frequency	Priority	Impact

Detailed Design: How work will be managed



Align processes, roles, governance

capture core and core-enabling work processes



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## Key Points

1. This is a process that can be used when time allows, and business needs are warranted:
  - a) Everything aligns with the strategy. It should clearly articulate the strategic objectives on which the organization (or function) is to be aligned.
  - b) Validate that the current-state operating model accurately reflects how the organization operates (if one does not exist recommend creating one)
  - c) Explore current *core* work activities using a value-chain view of how work is aligned. If it's a new organization, use the value chain to align work processes with the value delivered
  - d) Drill down into the work activities to gain more granular knowledge about work activity characteristics; categories of work; lateral integration performance; governance; effectiveness opportunities, etc.
  - e) Create current-state role maps to reveal the nature of work relationships (gives and gets; decision-makers; support required; environment-based relationships—steady state vs. emergency situations).
  - f) Develop the optimum operating model for the to-be state
  - g) Develop the structure that supports managing the work
2. Typical Project Scope
  - a) Typical medium-sized project (100-600 FTEs) 6 to 10 months
  - b) Typical small-sized project (50-100 FTEs) 6 to 12 weeks
  - c) Agile team consisting of Product Sponsor; Product Owner; Scrum Master (PM); 3-5 SMEs; Org Designer; HR Rep

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- d) Mega projects (greater than 800 employees) are usually done by outside consultants because they can resource these projects.

How can you deliver meaningful and useful discovery engagements to inform decision-making when time and money are in short supply?

## How do you structure the org design work when time is short?



Please type your response in this area

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### Key Questions

1. What is a common amount of time allowed for your projects?
2. How are your project teams structured ?
3. What is the focus and expected outcome of your typical project?

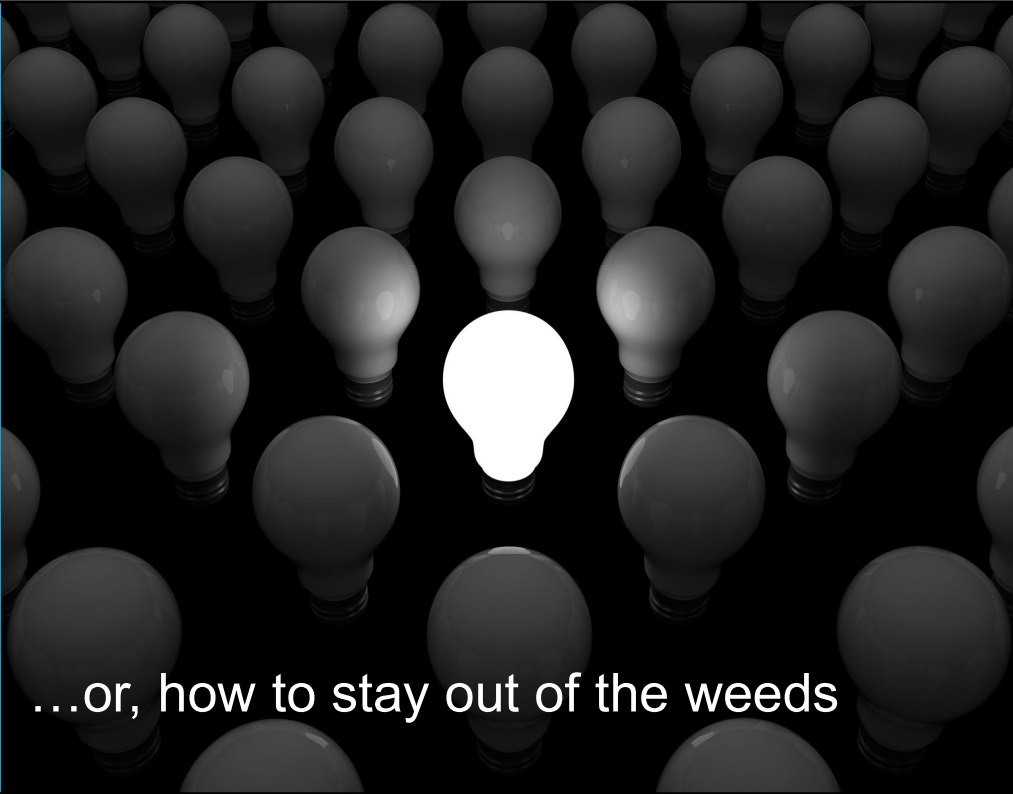
### Transition

- Yes; Data is important for making informed decisions; and some of the most revealing data you capture will be through the conversations you have with your clients.
- Let's look at what value chains can reveal and how they enable crucial design conversations and data gathering.

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Helping  
org design  
project  
teams  
focus on  
the work  
that  
matters...

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...or, how to stay out of the weeds

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# Choose a level of granularity for process mapping

Developed by Paul Wayne and Dennis Hutchison

## Levels of granularity

**Value Chain**  
The highest-level deliverable that, when accomplished in sequence, directly drive achieving the value proposition

**Value Chain Link**  
Represents an *outcome* of multiple processes and an organization capability. Multiple functions might contribute/participate.

**Processes**  
A series of interrelated activities that convert inputs into outputs. Multiple functions might be input contributors, participants, or the consumers of outputs.

**Activity**  
Detailed work that contributes to process execution

**Task**  
Step-by-step procedures

## Examples of levels

Explore → Develop → Produce

Develop

Plan the well    Drill & Complete    POP

Well trajectory plan    Select drilling hardware    Plan casing points    Log objectives & select logging tools

Step 1    Step 2    Step 3    Step 4

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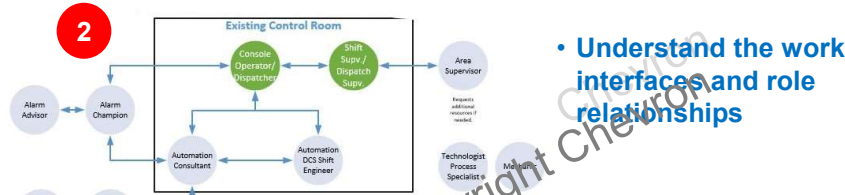


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## Alternative to the APQC's 5-Level of Work Analysis

1. The APQC model didn't resonate with our clients when introduced in the context of conducting an activity analysis
2. This model ties core deliverables to the value chain (which is now well-understood at CVX) and allows the team to have a very different kind of conversation.
3. APQC Category = Full value chain in our model
4. APQC Process Group = Value Chain Link (represents the outcome or the organization capability delivered)
5. Process = Process
6. Activity = Activities embedded within the process
7. Task = Step-by-step (we NEVER go here in our projects)

# Using value chains to reveal information about the organization



Activity Description	Business Unit	Priority	Impact	Frequency	Complexity	Dependencies	Resources	Skills	Tools	Information	Location	Timeline	Comments
Develop New Applications for Corporate Functions	BO	M	M	M	Established	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	
Application License Management (E.g. SAP, Oracle)	BO	DE	M	M	Unsure	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	
Local Application Support (Business Enablement)	BO	DE	M	M	Established	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	
Local Application Support (Corporate Functions)	BO	M	M	M	Established	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	
Local Life Cycle Management	Business Planning	L	DE	M	Unsure	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	
Business Planning (Budget, Performance)	Business Planning	L	M	M	Established	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	
Business Planning (Commercial Operations)	Business Planning	L	DE	M	Unsure/Unsure	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	
Life Cycle Management (Hardware, Software, Services, etc.)	Business Planning	L	M	M	Established	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	
Business (Executive Portfolio) (IT/CS/HR)	Business Planning	L	M	M	Established	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	Application Support	

• Ultimately, capture our learnings (data) to design the future-state.



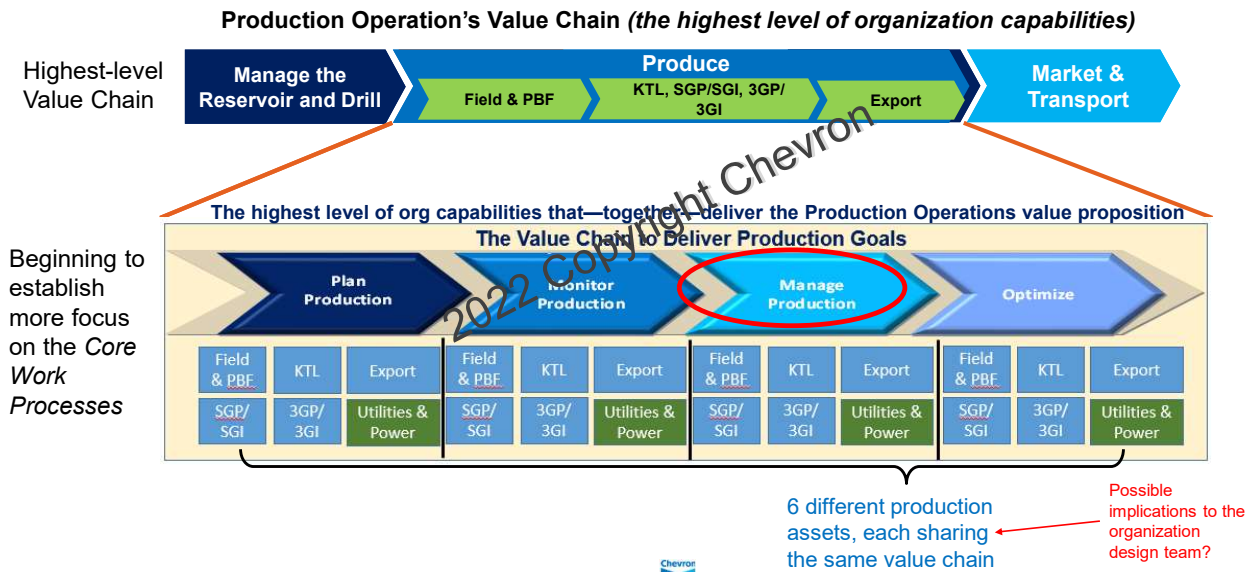
## Key Points

- Value chains are the mechanism for identifying and discussing the core and core-enabling work; the roles performing work activities; the governance, the technology needs, etc. without talking about boxes and sticks.
- When time is tight, maintain a high-level focus on all aspects of the work.
- Will touch on other tools that can be applied to capturing and analyzing data.
- The ultimate goal is to be able to articulate how the organization is intended to work once you have the right work alignment, role alignment, governance, etc..

## Example: revealing strategic insights about the work



Starting with a value chain helps your project team focus on the work that really matters (adds value)



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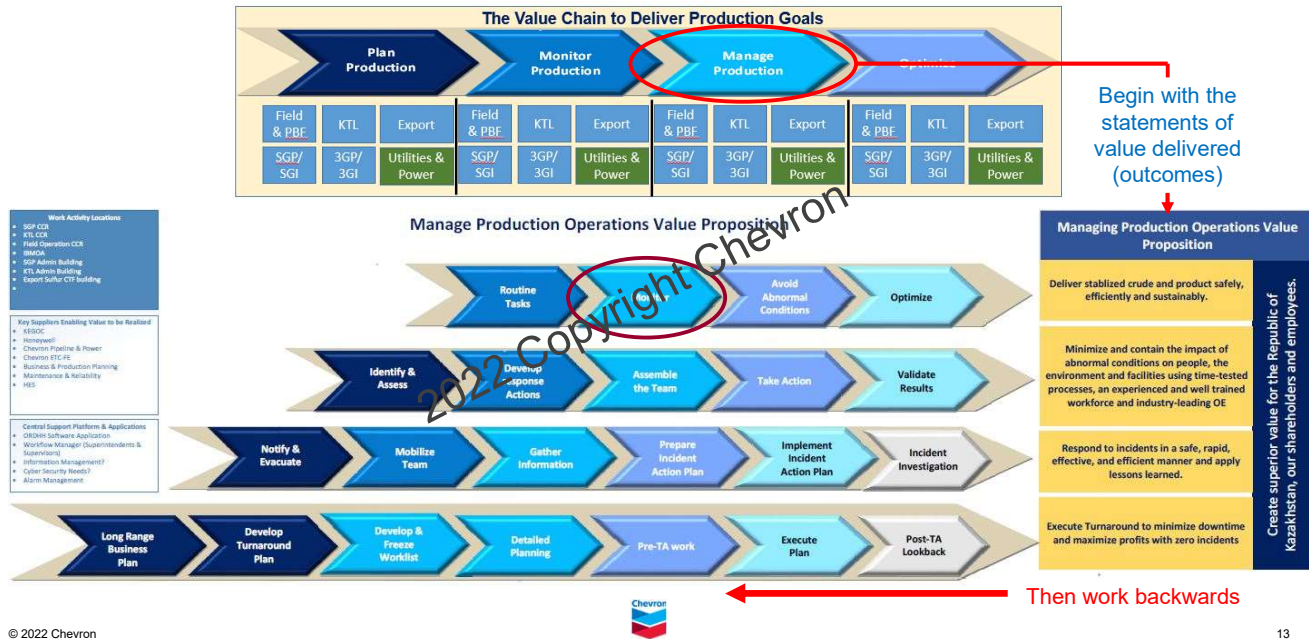
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### Key Point

A value chain is the visual representation of a full-range of **process outcomes** that —when completed and combined—deliver value (activate the operating model)

1. Background
  1. Kazakhstan project
  2. Change in strategy led to change in operating model
  3. New organization created with pieces from 6 other organizations
  4. Initial focus was to help the team reveal how their organization worked, currently
2. Start by capturing statements that describe the value created by the team. (VALUE PROPOSITION) **Why the organization exists.**
3. Work backwards to identify the outcomes (org capabilities) that directly contribute to delivering this value.
4. Recognize that each OUTCOME involves additional work activities that must be performed to deliver this capability.

## Exploring “nested” capabilities in the value chain



### Key Points

- Point out the nested value chains related to Manage Production.
- Each value chain was derived from a stated value proposition (basically, why your organization or function exists—from your customers’ or shareholders’ perspective; why you get paid to do what you do)
- Starting with the value proposition, work backwards to identify and capture the outcomes that collectively deliver the value proposition.

### Advantages of this approach

- Visual roadmap** of the critical work
- Focuses conversation** on how value is created (which feeds future discussions about organization capability needs) Reference: Shradha Prakash (VP Org Design @ Prudential) OD Conference Nov. 2021; asked this question: “How do we explain to our clients what we mean by organization capabilities?” Answer: focusing on the value chain desired outcomes can lead your clients through this discussion
- When time (or client patience) is short, focus on the part of the value chain where most of the pain is being felt
  - You can prioritize your value chain discussion from the value chain outcome experiencing
    - the most pain to least pain
    - Greatest to least effectiveness opportunity



- Highest to lowest efficiency (cost reduction) opportunity
  - Etc.
- 
- More consumable chunks of work for project team members to process and consider.

**Drill-down**

Suppose the project team identified Monitoring production to deliver stabilized crude is the highest priority for improving performance?

# Identify integration & effectiveness opportunities



Ensure operational continuity to deliver production quality & production goals

**Value Proposition**

Monitor Field Production	Monitor Plant Production	Monitor Export Production	Monitor Utilities	Monitor Power
<p><b>Core Activities</b></p> <ul style="list-style-type: none"> <li>Monitor Wells &amp; Metering Stations for Process Compliance (flow, temperature &amp; pressure)</li> <li>Monitor Flowback (RMG)</li> <li>Monitor Pigging Operations</li> <li>Monitor Trunkline Switching</li> <li>Monitor Equipment Health and Operational Impact of Equipment Maintenance</li> <li>Monitor Flaring</li> <li>Monitor Turnaround</li> <li>Console Operator Routine Duties (ORDHH)</li> </ul>	<p><b>Core Activities</b></p> <ul style="list-style-type: none"> <li>Monitor Flowback (RMG)</li> <li>Monitor Pigging Operations</li> <li>Monitor Trunkline Switching</li> <li>Monitor Equipment Health and Operational Impact of Equipment Maintenance</li> <li>Monitor Product Quality</li> <li>Monitor Production Output</li> <li>Monitor Flaring</li> <li>Monitor Sour Gas Injection Process</li> <li>Monitor Turnaround</li> <li>Console Operator Routine Duties (ORDHH)</li> </ul>	<p><b>Core Activities</b></p> <ul style="list-style-type: none"> <li>Monitor Equipment Health and Operational Impact of Equipment Maintenance</li> <li>Monitor Product Quality</li> <li>Monitor Production Output</li> <li>Monitor Flaring</li> <li>Monitor Transportation (not in IOCC)</li> <li>Monitor Gas Pipeline</li> <li>Monitor Turnaround</li> <li>Console Operator Routine Duties (ORDHH)</li> </ul>	<p><b>Core Activities</b></p> <ul style="list-style-type: none"> <li>Monitor Equipment Health and Operational Impact of Equipment Maintenance (compressors/boilers/others)</li> <li>Monitor Instrument Air &amp; Trench Cooling, Steam Production, Nitrogen, Hot Water, Chilling Water, Technical Water</li> <li>Monitor White Elephant Unit</li> <li>Monitor Turnaround</li> <li>Console Operator Routine Duties (ORDHH)</li> </ul>	<p><b>Core Activities</b></p> <ul style="list-style-type: none"> <li>Monitor Equipment Health and Operational Impact of Equipment Maintenance (gas turbine systems)</li> <li>Monitor Power Management System</li> <li>Monitor the health of KEGOC equipment</li> <li>Monitor FLS (Fast Load Shed) Status</li> <li>Monitor Turnaround??</li> <li>Console Operator Routine Duties (ORDHH) [Note: Power is migrating to IOCC, first]</li> </ul>

## Opportunities to explore

- What's **working** / What's **not working**?
- Where are there **redundant work** activities?
- Where are the **key integration points** (lateral connections)?
- Where are there **governance challenges**?
- Are there **best-practices** for similar work activities?
- Are there **opportunities to standardize** work?
- Are there **opportunities to automate** work processes?



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## Key Points

- Laser-focused on the work that delivers results.
- Dimensions you are now able to explore?
  - What's working / what's not
  - Core-enabling work
  - Process integration points
  - Characteristics: Standardized, Unique, Compliance, Shared with others; location;
  - Technology needs; governance improvements; etc.

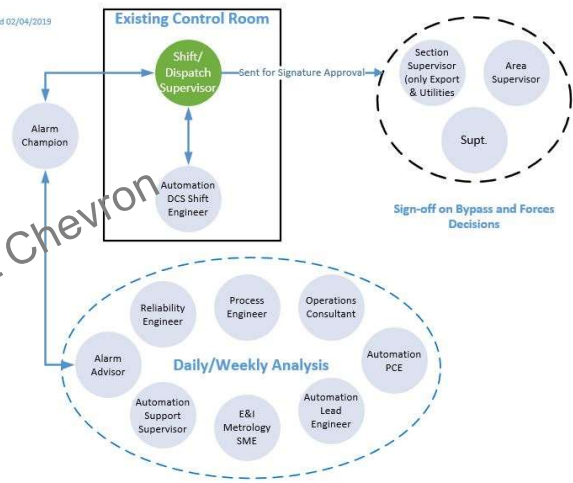
## Drill Down:

1. Identifying the outcomes that link together to create value changes the conversation
  - a) It's about work characteristics needed to deliver value
  - b) It's about how we align work to achieve the outcomes that adds value
  - c) It's about the support needed to do the work well
2. And it's about mapping the key roles to reveal the network of people and relationships working together to execute the work effectively and deliver value

# What about how work is integrated and role relationships?

## Key Job Roles: Decide on Course of Action Alarm Process

Updated 02/04/2019



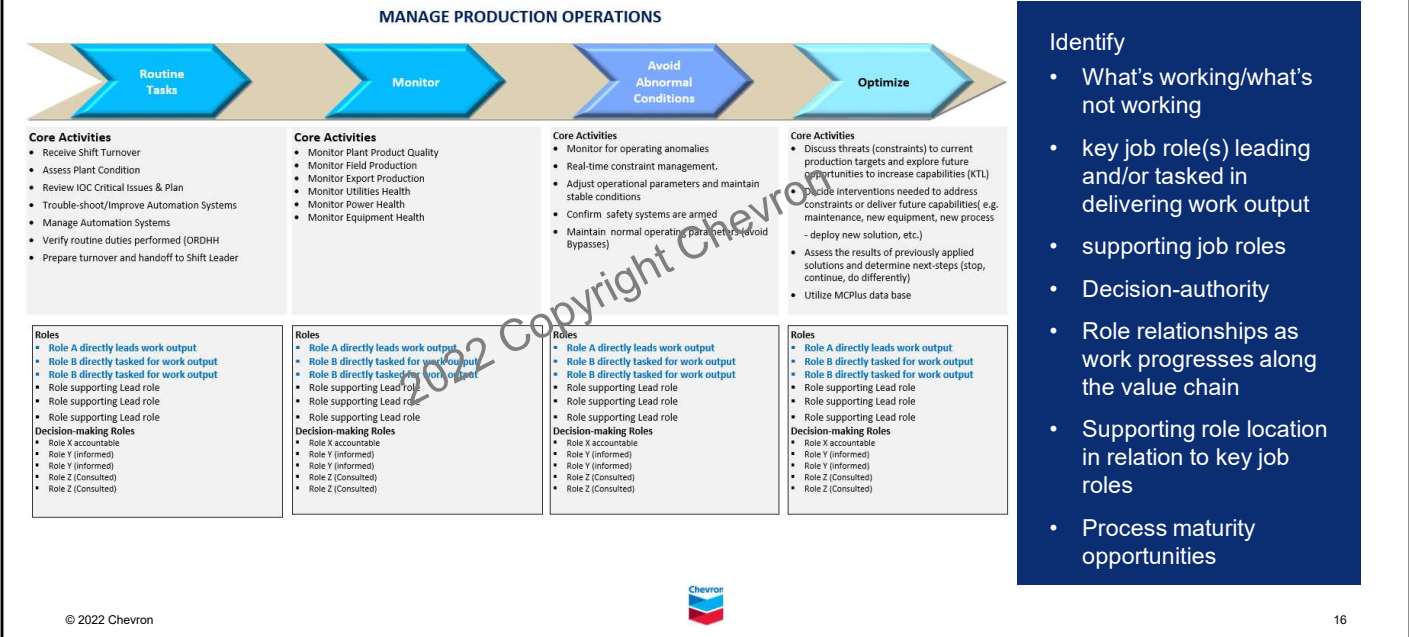
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Let's change our focus from understanding and aligning work activities to exploring the roles & relationships that **execute core and core-enabling work activities.**

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# Focus on key and supporting job roles as core work progresses



## Key Points

- Tie work activities to the value chain link they enable. This view helps teams focus on the work that matters most (core/core-enabling work)
- Prevents getting bogged down in defining *core* and *core-enabling* (low-value discussion)
- Reveals the key roles & key job responsibilities (KJRs)
- Reveals the capabilities needed for success (process, people, technology)
- Reveals how and where the needed capabilities exist across the functional areas (org capabilities exist through a combination of roles, functions, technology deployed, decision-making effectiveness, etc.)
- Explore what's working (relationships; hand-off points; decision-making; capabilities; etc. and what's not working).

## Drill Down:

- Identifying the core and core-enabling work needed to deliver value changes the conversation from sticks/boxes to capability needs (process, people, technology) and opportunities to improve
  - It's about the nature of the work needed to deliver value
  - It's about how we effectively align work
  - It's about the roles and supporting roles needed to do the work effectively and efficiently.
  - And, it's about revealing and analyzing the network of people and relationships working together to execute the work effectively and deliver value (gives, gets,

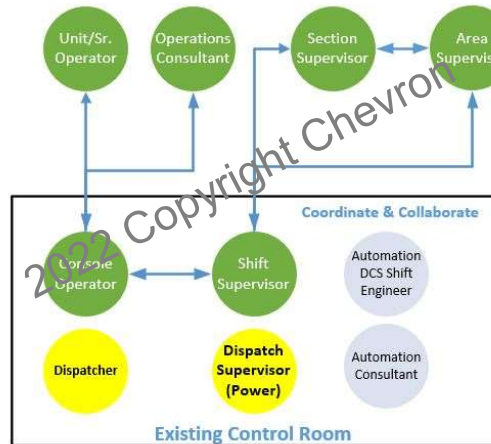
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governance)

## Alarm Management Value Chain & Role Interfaces



- Apply AOA
- Initiate Alarm System Testing (new project/new equipment)
- Identify Addenda to Alarm Philosophy Specs
- Implement Alarm Display Hierarchy & Navigation
- Deliver Alarm Philosophy Training



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*Note: this is a different value chain within Production Management: Manage Alarm*

### Ask

Given this view, what data could you expect to capture about how work is executed?

### Key Points

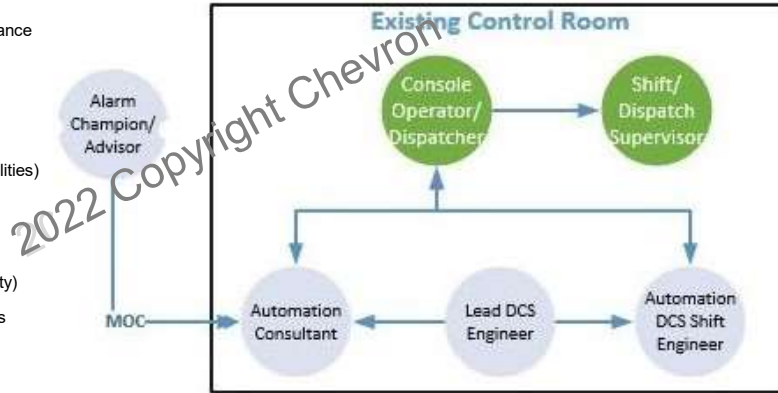
- Enables conversations about key roles and role relationships in the context of the work.
- Capture primary “doer” roles versus support roles
- Explore characteristics of the gives and gets
- Explore how decisions are made and by whom (governance)
- Explore proximity needs of doer role to support roles
- Explore frequency of communication
- Explore role and process maturity needed to be successful

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## Alarm Management Value Chain & Role Interfaces



- Monitor Alarm System Performance
- Monitor Equipment Alarms
- Monitor Environment Alarms
- H2S Gas Detection Alarms
- Monitor Fire & Gas Alarms (facilities)
- Process Alarms (temperature, pressure, flows, levels)
- Forces & Bypasses (SI-153) (automation removed this activity)
- Analyze Recurring False Alarms



### Key points

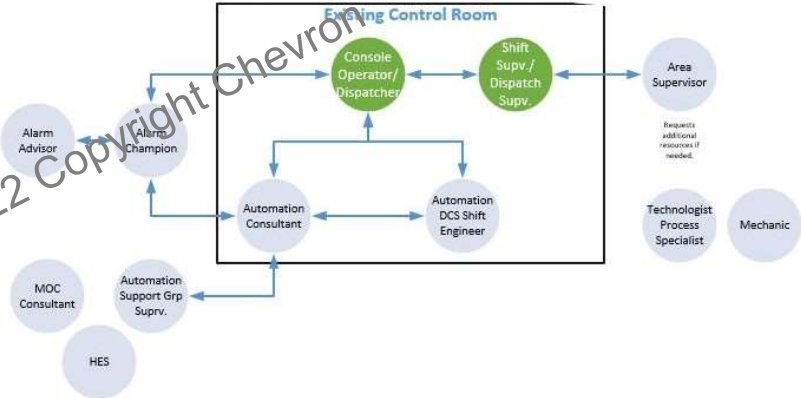
Cycling through the slides reveals how work relationships change as different org capabilities are delivered. Expands the conversation further. Reveals points specific to the work environment  
 Can reveal work-scope overload points.



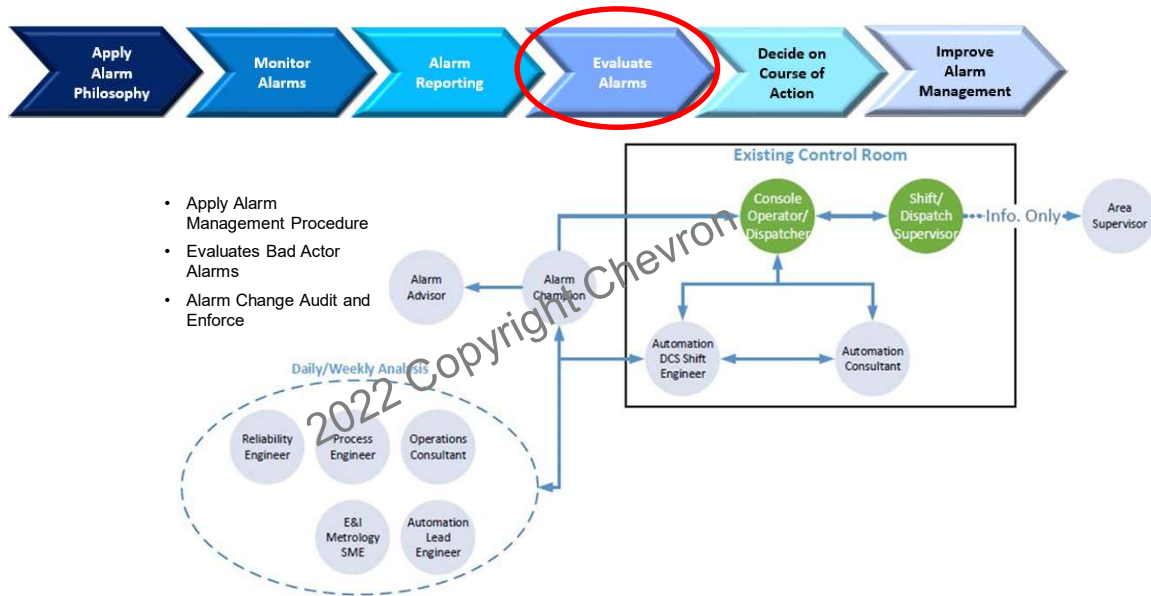
# Alarm Management Value Chain & Role Interfaces



- H2S Gas Reporting
- MOC Reporting
- Disable/Enable Alarm Reporting
- Frequent Alarm Reporting
- Stale Alarms (Active for >1 day)
- Alarm changes reconciliation (audit/enforce)



## Alarm Management Value Chain & Role Interfaces



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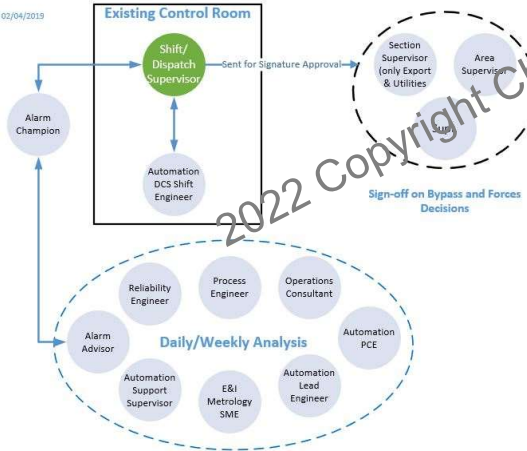
**Note:** The roles where a great deal of interaction occurs; is this an indicator of the role's workload? Can it help to explain reported fatigue, burnout, error rates, bottlenecks, or employee turnover?

# Alarm Management Value Chain & Role Interfaces



## Key Job Roles: Decide on Course of Action Alarm Process

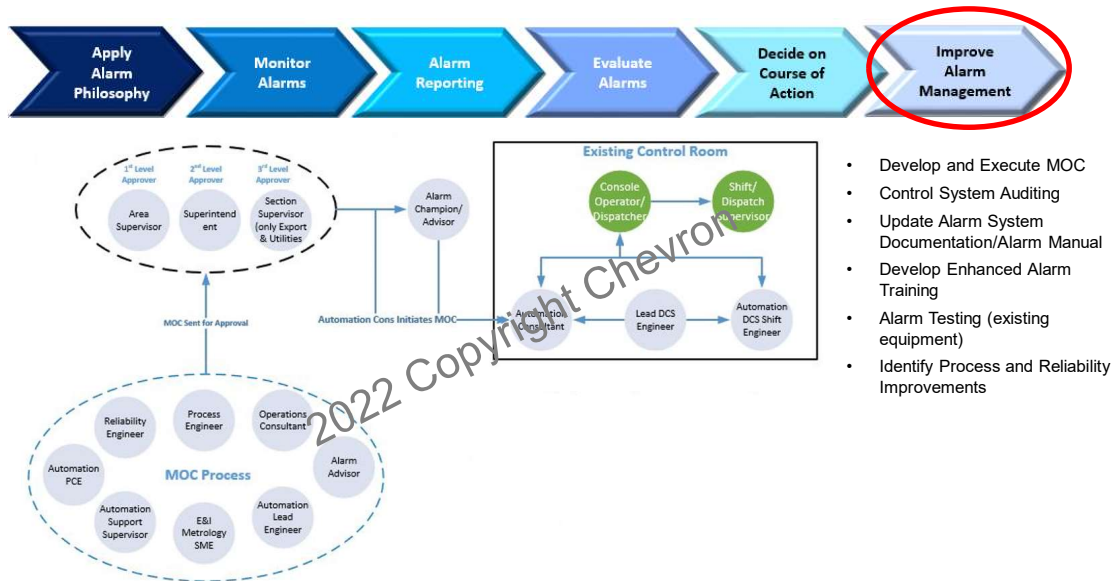
Updated 02/04/2019



- Frequent Alarm & Stale Alarm Problem Resolution
- Apply AOA (if involves new, modified or significant events)
- Apply Alarm Philosophies & Standards



## Alarm Management Value Chain & Role Interfaces



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### What do you see as the benefits of having role maps?

1. Reveals decision makers (governance)
2. Defines the matrix (how it works)
3. Illustrates how integration change with the work process
4. Highlights communication needs;
5. Highlights handoff points
6. Makes the interfaces explicit
7. Contributes to formation of job descriptions if they need to be refreshed
8. Professional development standpoints could provide insights into the type of training (interpersonal and technical)
9. Can reveal staffing level needs; transparency and insights into workload demands
10. Support bottlenecks;

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# Capturing data

The screenshot displays a complex data management interface. At the top is a table titled 'Roll Up (workstream or deliverable)' with columns for Activity Description, Workstream, and various organizational and project attributes. Below this is a 'Watch point identified' table with columns for Workstream, Org Design Element, and April to be Addressed. To the right of these tables is a 'Notes' column containing detailed text. At the bottom of the screenshot is a MindMap diagram with a central node and several branches, likely representing a project structure or organizational chart. A large '2022 Copyright Chevron' watermark is overlaid diagonally across the image.

Primarily use two readily available tools to capture, analyze, and track data: Excel and MindMap

# Capturing work activity data

Activity Description	Roll Up (workstream or deliverable)	Front Office (FO)	Back Office (BO)	Link activities (I)	Core Enabling Necessary	Compliance Year/No	Unique/Decide on Shared	R/dote) That Perform this Activity	Where the Service is Delivered Currently	Centralization High (H) Medium (M) Low (L)	None (N)	Where Service could be delivered in the future	Skill set Needed for Activity	% of FTE time spent on this activity	Comments
Develop New Application for Corporate Functions	Business & Engineering Application Support & Development	BO	N	N	N	Standardized	Application Support	All Countries	Medium	Local/Regional					
Application License Management	Business & Engineering Application Support & Development	L	N	Y	Y	Standardized	Application Support Tech Application Support PM Coordinating	All Countries	Medium	Local/Regional					
Interface and integrate applications (JDE, SAP, Ariba)	Business & Engineering Application Support & Development	BO	CE	N	N	Unique	Application Support Business Analyst (PM) -	All Countries	Low	Local					
Local Application Support (Business Enabling functions)	Business & Engineering Application Support & Development	BO	CE	N	N	Standardized	Application Support	All Countries	Low	Local					Sales & revenue Module, unique to Colombia
Local Application Support (Corporate Functions)	Business & Engineering Application Support & Development	BO	N	N	N	Standardized	Application Support	All Countries	Low	Local					Payroll & Tax is unique for each country; check with stakeholders to ensure that we aren't breaking anything
Asset Life Cycle Management	Business Planning	L	CE	N	N	Unique	Business Planning IT Managers Infrastructure TL Application TL	All Countries	Medium	Local/Regional					
Business Planning (Budget, expense review)	Business Planning	L	N	N	N	Standardized	Business Planning Infrastructure TL Application TL	All Countries	High Probability	Regional					
Business Planning (forecasting, assumptions)	Business Planning	L	CE	N	N	Unique & Shared	Business Planning IT Managers Infrastructure TL Application TL	All Countries	High Probability	Regional					Part of the BP is strategic and some is transactional.

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## Analysis Enabled

**Explain purpose:** a way to capture work characteristics for analysis

**Scenario:** IT Manager tells you they have to cut cost by consolidating departments in multiple Latin American countries; reduce service delivery time and provide better customer support the technical workforce. How can this help?

### Questions that can be answered with this view

- Which activities are core to the value this organization/function/group delivers?
- What are the Backoffice activities?
- Which activities are standardized or could be?
- Which necessary or core-enabling activities could be given to trusted 3<sup>rd</sup>-party vendors?
- Which work is unique but could be centralized (high/ medium-high likelihood)

### Ask

1. How could you apply this tool in your work?

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2. What characteristics would you be interested in analyzing?
3. Use Capability Maturity Model to identify opportunities to improve process, team behaviors, technology enablement.



## Capturing “Watch-points” Data

Workstream	Org Design Element	Sprint to be Addressed	Disposition																			
Value Chain Capability Workstream Function Center of Expertise Other??	Is it related to Process? Talent? Culture? Structure? Governance? Technology Gap? Combination of elements?	Epic 3 Sprint 2	Status? Actions? Dependencies?																			An ETC FE the Field should own
V2022+	Process/Structure/Governance/ Hr Job Desc.	Vision 2022+	The Vision 2022+ project addresses this question																			Current Vision business ser and administr whose mana
Manage & Monitor	Strategy	Epic 3 Sprint 2	Addressed by Wade	X	X	X				X	X	X	X	X								An ETC FE the Field should own
V2022+	Structure/HR Job Desc.	Vision 2022+	Addressed partially in IOCC Org Design and partially in Vision 2022+																			Is it reasonable Console Opt PSG level with Current Vision Superintend Production to be embedded
HR/Culture	Culture/Change Mgmt.	Epic 3 Sprint 3	Migration Team Consideration?	X	X	X	X	X	X	X	X	X	X	X								This topic is point of sec the IOCC.
Field Ops	Structure/Process/Governance	Epic 3 Sprint 1	Must have this to determine Future-State organization	X														X	X	X		If the expect as possible IOCC super
PowerBoost Facility	Structure/Process/OC/HR Job Desc.	Out-of-Scope for Org Design	Limitations in PBF operational details could be a barrier to a quick answer. Past experiences does not confirm future results	X																	X	An ETC FE the Field should own

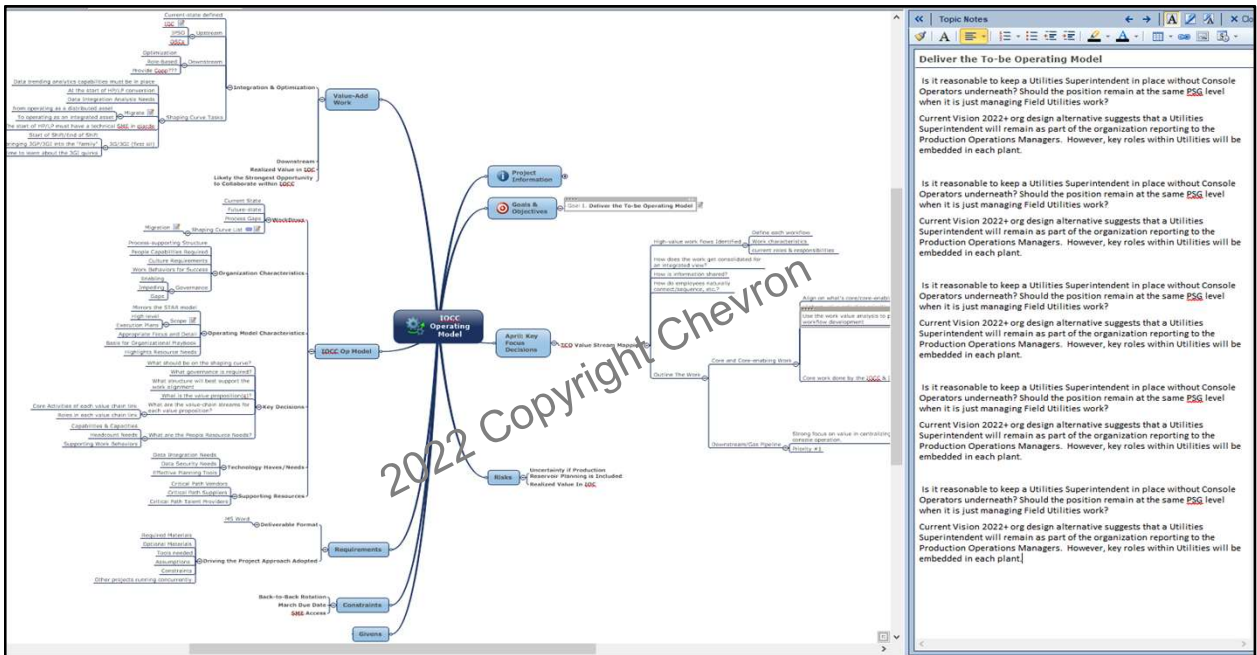
### Key Points

This tool is used to capture comments, observations, painpoints, improvement suggestions, change management challenges that may not apply to the project teams’ immediate focus area but will need to be tracked and resolved, eventually.

### Types of Watch Points to Capture

- Governance contributing to confusion; slow decision-making; or needed to fill operational gaps that are not addressed by the work alignment (structure).
- Challenging change management issues/conditions
- Issues involving a function, team, business unit that is out of scope for your project but will need to be addressed
- Technology deficiencies that need to be filled to achieve best-practice performance (AI, automation, interoperability, etc.)
- Team and Leadership work behaviors that will need to be addressed if the new way of working is to be adopted and successful
- Etc.

# Capturing data from org walk-through



## Key Point

1. Conversations with clients will not be linear. Humans do not think linearly so we need a non-linear way to capture data. This tool allows you to capture conversations as they progress and make connections, tag, categorize, etc. real-time.
2. Exports in many different formats to allow further analysis using other tools (Excel for example).

Thank you for sharing your time.

Questions? Comments?



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