



# KEY FINDINGS

**A PORTFOLIO OF VARIED PROJECT  
INSIGHTS & OUTCOMES**

Business Analyst Services

WHO WE ARE

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# EXPOSING CHANGE READINESS + DESIGNING CULTURALLY-INFORMED CHANGE STRATEGIES

New Orchard is a change analytics firm focused on empowering change makers with actionable data to drive outcomes.



OUR APPROACH

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## 3 ENVIRONMENTAL PERSPECTIVES

GATHERED FROM ALL LEVELS OF AN ORGANIZATION

Business Identity & Alignment

Change Capability & Institutionalized Behaviors

Operational Maturity & Sustainability



# **STRESS ANALYSIS OF ORGANIZATIONAL STRUCTURE**

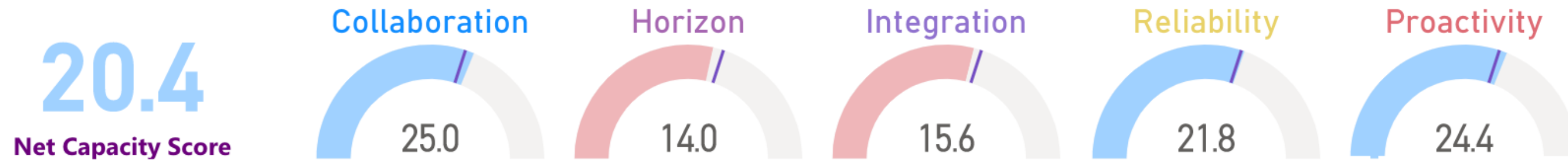
New Orchard was asked to compare the perspectives of different groups across at various level of organizational structure to identify the greatest areas of stress within a rapidly growing business.



# KEY FINDING

Outlook is good for executive leaders and team members, at the expense of middle management. Middle managers are too involved in delivery and working harder, not smarter, to get things done.

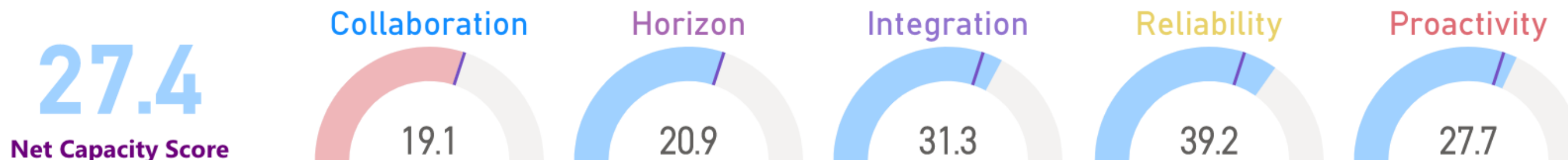
## Executive Leadership Perspective



## Middle Management Perspective



## Team Members Perspective



## KEY FINDING

Leaders believed that poor systems and processes and significant recent growth were keeping their middle managers from achieving higher performance. While this was true, it wasn't the root problem.

The root issue was a lack of time, permission, and know-how at the middle management level to develop and practice key leadership behaviors (that would lead to better systems and processes).

## Middle Management Trouble Areas

| Facet  | Net Capacity Score |
|--|--------------------|
| Tendency towards predictability                              | -87.5              |
| Daringness/boldness  | -75.0              |
| Tolerance for risk   | -75.0              |
| Tolerance towards long-term investment                       | -75.0              |
| Ability to visualize a certain outcome/future                | -50.0              |
| Curiosity for new ideas/innovatio                            | -37.5              |
| Experience in overcoming difficult challenges                | -37.5              |
| Possess vulnerability  | -37.5              |
| Ability to visualize and implement complex models or systems | -25.0              |
| Hospitality to new/different people or experiences           | -25.0              |
| Ability to translate strategic goals into daily tasks        | -12.5              |
| Assertiveness  | -12.5              |
| Hospitality to diverse perspectives                          | -12.5              |
| Tendency to ask others for help                              | -12.5              |
| Tendency towards hope and optimism                           | -12.5              |
| Tendency towards order/structure                             | -12.5              |

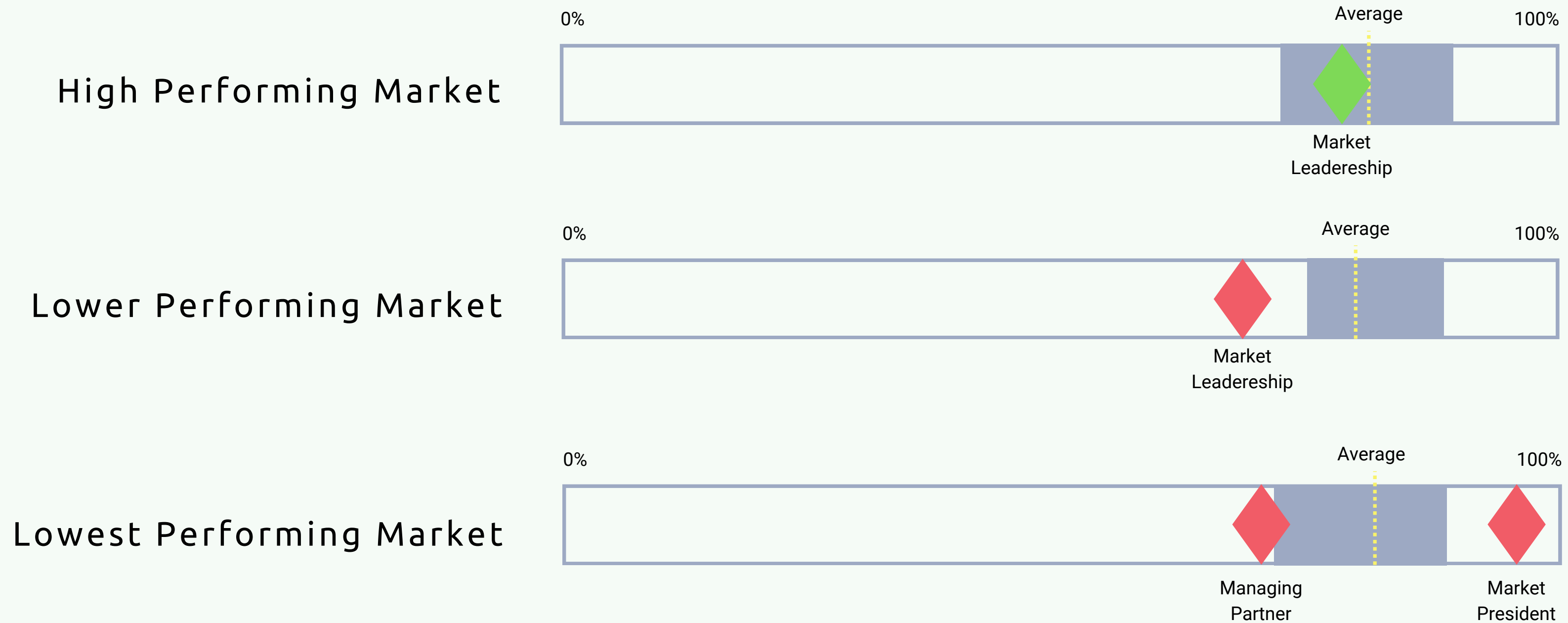


# MARKET PERFORMANCE COMPARISON

New Orchard was asked to compare 3 senior primary care markets in similar locations in Florida. 1 market was high performing. The others were struggling to gain traction, despite similar resource investment.

# KEY FINDING

Performance is higher in the market where leaders are (1) aligned on sentiment and outlook with each other and; (2) aligned with medical staff and administrators on the ground.







# DEI COMPARISON ACROSS CLINIC LOCATIONS

New Orchard was asked to perform a general DEI analysis across multiple clinic locations after leadership received continued complaints regarding hospitality at certain locations.

## KEY FINDING

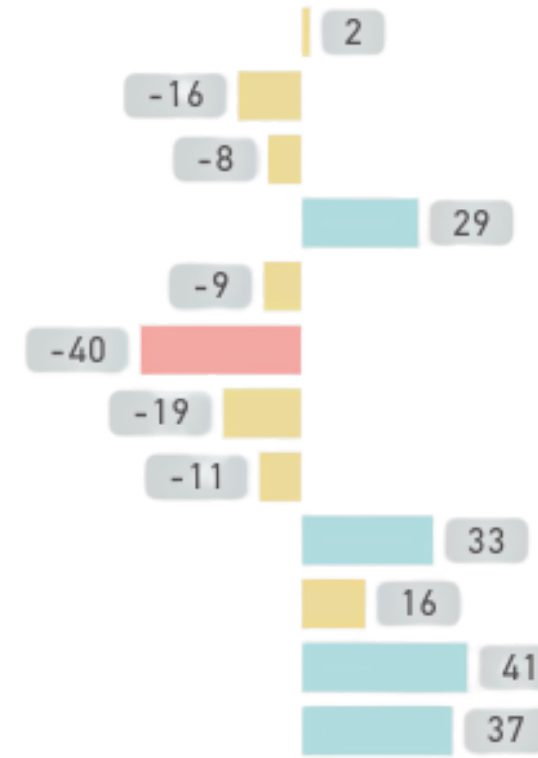
Non-white respondents at the WEST clinic reported more positive sentiment on the general collaborative environment than their white counterparts.

In contracts, non-white respondents in the EAST clinic reported markedly more negative sentiment on the collaborative environment.

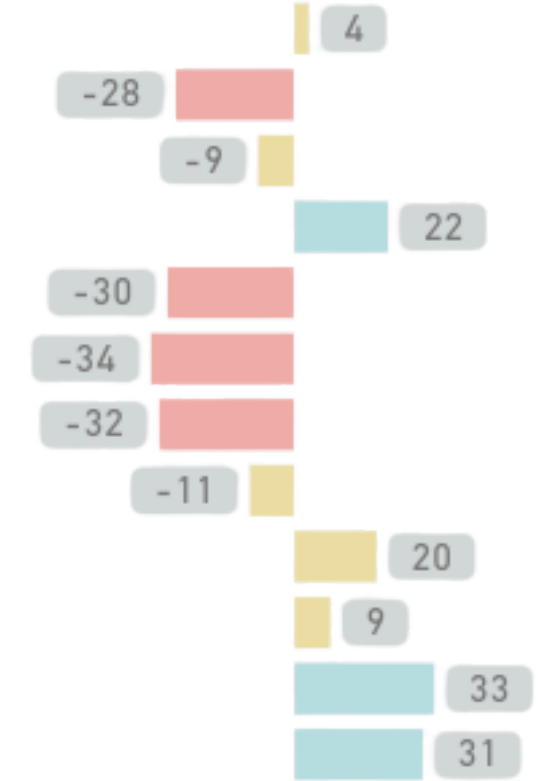
### Diagnostic Clinic WEST

Ability to communicate through conflict  
 Ability to entertain opposing arguments simultaneou...  
 Ability to learn from others  
 Ability to seperate personal worth from professional ...  
 Assertiveness  
 Curiosity for new ideas/innovation  
 Hospitality to diverse perspectives  
 Hospitality to new/different people or experiences  
 Possess vulnerability  
 Respect for the ideas of others  
 Tendency to ask others for help  
 Tendency to give the benefit of the doubt

Non-White Scores



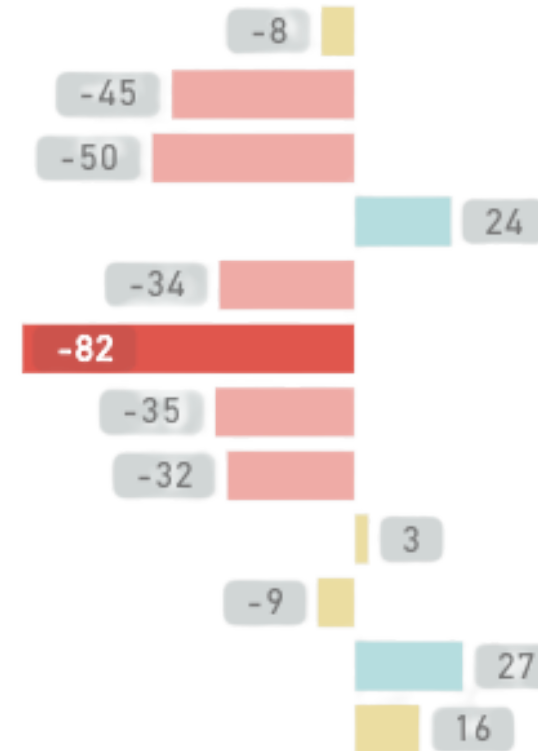
White Scores



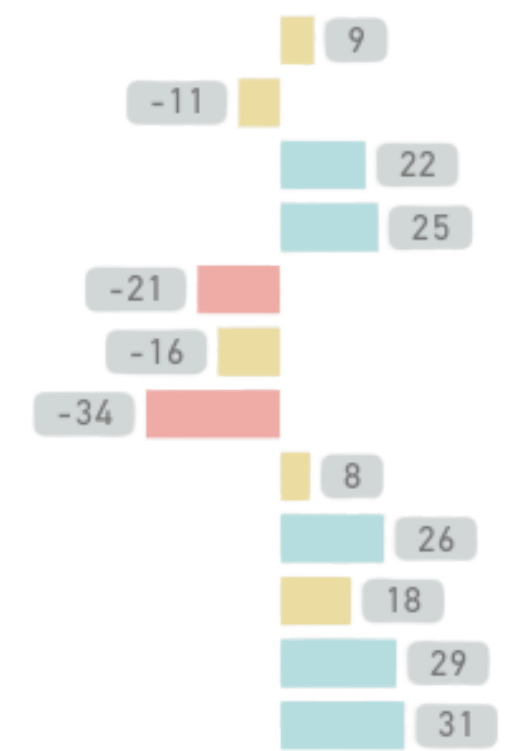
### Diagnostic Clinic EAST

Ability to communicate through conflict  
 Ability to entertain opposing arguments simultaneou...  
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Non-White Scores



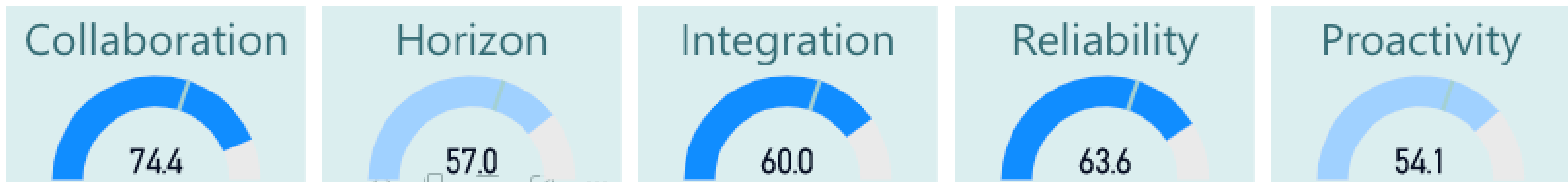
White Scores



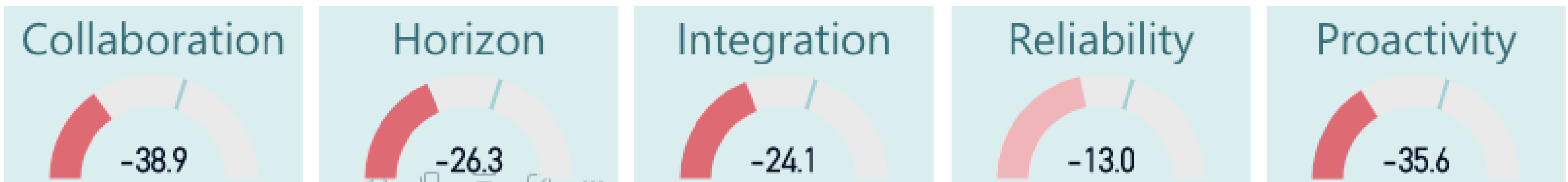
## KEY FINDING

Unexpected findings: While leadership had not received specific feedback that indicated an issue related to gender, our data exposed a drastic difference in the general sentiment of male and female employees at the Diagnostic East Clinic.

Male Sentiment on General Environment - Diagnostic EAST (3 individuals)



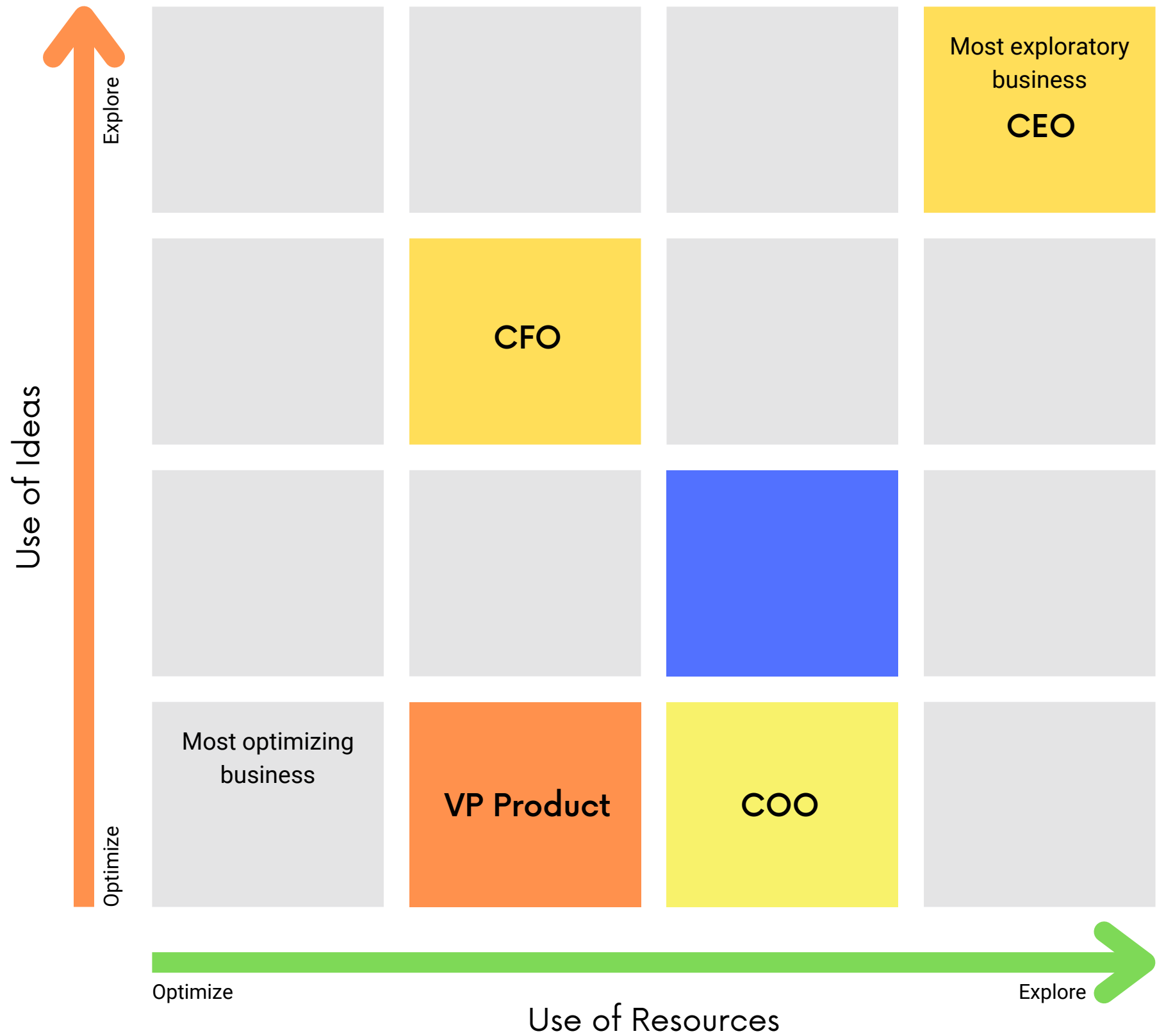
Female Sentiment on General Environment - Diagnostic EAST (13 individuals)





# NEW PRODUCT LINE STRATEGIC PLANNING

A 10-year-old market leader wants to get back in the innovation game. New Orchard was brought in to inform the strategic plan in a time of ambiguous transition.



## KEY FINDING

An ambitious CEO is pulling the company towards more a risk-tolerant and explorative position with a new innovative product, leaving operators in a place of concern about what will happen to the current product and operations.

Clarifying ambiguous terms (like disruption vs innovation) and compromising on ideal state brought the team clarity and eased tensions.



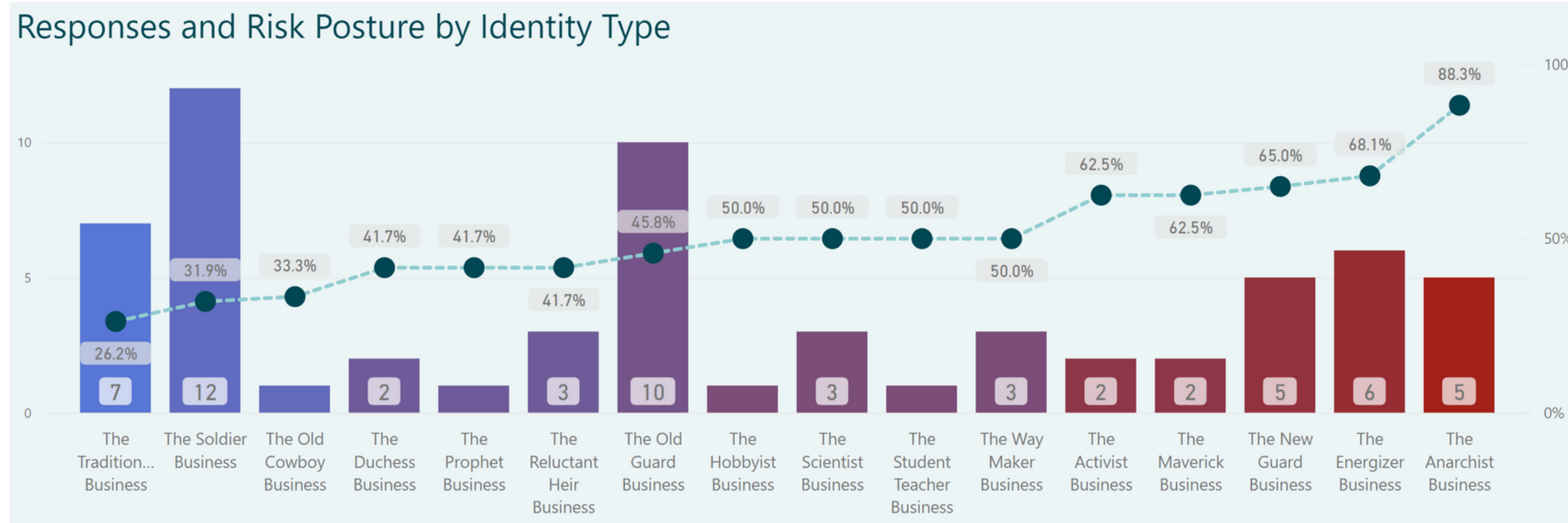
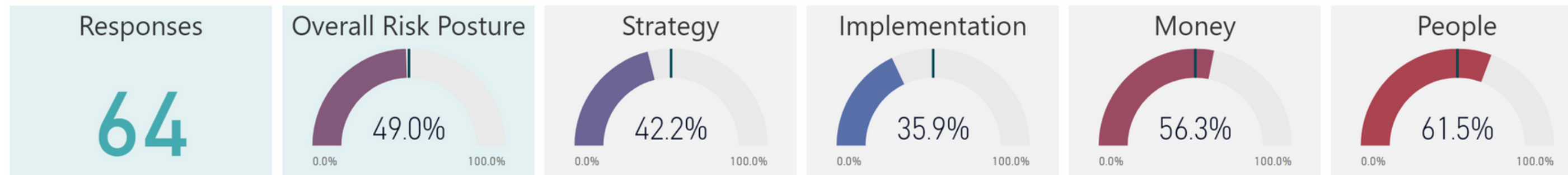


# POST-INTEGRATION CULTURAL ANALYSIS

New Orchard evaluated an organization after an acquisition to determine if executive leaders were clearly communicating direction across multiple levels of leadership.

# KEY FINDING

Executive leaders discovered "micro-organizations" being built within their business, each with unique and contrasting approaches, directions, and methods. A lack of clear identity and direction allowed influential leaders to divert focus away from strategy.





# PRE-INTEGRATION MARKET ANALYSIS

New Orchard was asked to evaluate a newly acquired market prior to the beginning of the integration process in order to provide integration teams with clarity on cultural anomalies that could affect outcomes.

## KEY FINDING

New owners changed a restructuring strategy after exposing critically low hospitality to diversity and tolerance for risk among clinic administrators, among other challenges.

**AS REPORTED BY THE Southeast Care MARKET ITSELF, THE FOLLOWING MINDSETS, TENDENCIES AND BELIEFS CURRENTLY REPRESENT REAL RISKS TO INTEGRATION:**

### Critical Risk:

- Lack of hospitality to diverse perspectives
- Lack of daringness or boldness

### High Risk:

- Lack of predictability in day-to-day activities
- Lack of ability to anticipate challenges before they arrive
- Low tolerance for risk

6 FACETS ARE CURRENTLY BEING CARRIED BY THE VP OF OPERATIONS, MAKING HER A CRITICAL PART (AND CRITICAL RISK TO) THE LEADERSHIP TEAM.

High Risk:

- Ability to manage multiple pathways at one time
- Resourcefulness

Medium Risk:

- Insightfulness
- Attention to detail
- Curiosity for new ideas/innovation

## KEY FINDING

New owners were convinced of a previously unrecognized key man risk when our data exposed that the outgoing VP of Operations was carrying significant behavioral influence over the leadership team. In her absence, key behaviors that support strategic planning and implementation may no longer function.