ASSESSING AND TRANSFORMING CORPORATE CULTURE:
A COMPREHENSIVE APPROACH

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Abstract

Simon Associates Management Consultants (SAMC) specializes in helping companies adapt to fast-changing times. In this white paper, we have scoped out our methodologies to assess, diagnose, and help transform companies to better align their cultures with their business models and objectives. Our approach integrates rigorous assessment tools, experts to analyze the results, and tailored action plans to help business leaders identify

cultural challenges and develop customized action plans to address them. Our aim is to help businesses build a positive, productive, and highly adaptive workplace.

The Importance of Corporate Culture

Companies today face an extraordinary array of organizational challenges, from new technology to a new generation of employees, from clients with new demands to stakeholders wanting a return on their investments. Interest in culture change experts on Google is soaring. What must companies do to adapt "the way we do things" to "the way we must do things" if they will thrive in these fast-changing times?

First, what is a corporate culture? Culture is a human creation built so that people can get things done in a recurring, habitual fashion. In a company and a society, culture becomes how people conduct their daily tasks. The rules guiding people become the safety net ensuring that everyday activities can get similarly done each day, but individual people are responsible for particular jobs. These combine into a pattern that allows new hires to understand expectations and perform appropriately in different contexts. The culture is shared, and those values, beliefs, and behaviors become known as the company itself. Each department might have its modifications of those overarching standards and expectations. But when put together, you can see a code of conduct shared and reinforced by the stories people tell each other about that sacred "way we get things done."

While this is all wonderful when the business demands are recurring and relatively stable and predictable, the culture can become a significant roadblock for an organization facing change, regardless of where it comes from.

A healthy, aligned culture can boost employee engagement, innovation, and productivity while fostering a healthy work environment. Conversely, a dysfunctional culture can lead to low morale, high turnover, and organizational stagnation. What might have worked well in the past might become toxic as expectations among employees and the corporation evolve with the times. And they will continue to develop as the business environment responds to new demands.

Simon Associates Management Consultants (SAMC) specializes in helping businesses assess, diagnose, and transform their corporate culture. We understand that culture is not static and can be intentionally shaped to align with a company's values and goals. Our approach is data-driven, customizable, and designed to empower organizations to create positive cultural change. How do we do this? Why does it matter?

Anthropologists Assessing Corporate Culture

As [corporate anthropologists](#), we use the tools of anthropology to help assess and transform a company's culture. While each case is unique, we generally begin our process by employing observational research, storytelling techniques, and detailed questionnaires to gather information and insights on employees' perceptions of the current culture. These tools help identify strengths, weaknesses, and areas of misalignment within the organization. In addition, we ask all the employees to take the Organizational Culture Assessment Instrument (OCAI), which you can sample here: www.ocai-online.com. The sample will show you why we find this tool so valuable to capture the perceptions of staff members, boards, and even clients.

The OCAI was developed at the University of Michigan and has been widely used for over 20 years in evaluating corporate cultures. We are also consultants with the group in the Netherlands which holds the license for the OCAI.

Using the OCAI allows us to conduct a situational assessment with a well-established foundation for capturing an organization's core values, beliefs, and behaviors. From there, together with leadership and staff, we can refocus and reframe the company's culture.

Thematic Data Analysis

Once we have a data bank of qualitative interviews and stories to share, we use a thematic analysis tool to convert the "soft" data into more quantitative data that can better indicate what is taking place in a company. Our experts thoroughly analyze the collected data, identifying patterns, trends, and discrepancies. This analysis helps pinpoint areas of concern and opportunities for improvement.

While the OCAI is very useful in capturing the patterns that people believe reflect their present organization and how they would prefer it to become, it requires additional information to flesh out the patterns and provide concrete details about what the results mean to the employees. Far too well, we know that words have different meanings in different contexts. When we apply the OCAI and observe how people get their jobs done, new insights emerge regarding how individuals understand what they are seeing and doing.

Diagnosing Cultural Challenges

Based on the assessment data, we then work with clients to identify specific cultural challenges and areas that require attention. This stage involves prioritizing issues based on their impact and feasibility of change. We delve deep into the root causes of cultural

challenges, examining factors such as leadership behaviors, organizational policies, and historical influences. Understanding these drivers is crucial for effective transformation.

Using our tools, we create a detailed map of the existing culture, including its values, beliefs, and behaviors. This snapshot is a reference point for designing the preferred future or desired culture. We work collaboratively with our clients to help define clear cultural goals and values that align with the organization's strategic objectives. These goals become the foundation for cultural transformation.

Building a Transformation Plan

This is the most critical next step. Visualizing what an organization would prefer to become is always a challenge. To accomplish this, we form groups reflecting the organization's structure to set clear objectives and goals. We ask, "If you could change 'the way you do things here,' what would that look like? How would it feel? Why would it be better than what takes place today?"

To track progress throughout the cultural transformation process, our team helps clients establish measurable objectives and key performance indicators (KPIs).

This entire process is highly collaborative. We work closely with the organization, from the leadership to the line staff, to articulate and communicate the desired cultural values, ensuring alignment with the overarching mission and vision. The integration of the process throughout the organization is essential. The folks in the trenches are the ones who live the culture and believe it to be the right one for them and the organization. In essence, they want an organization that they can trust.

Creating an Implementation Roadmap

Together with the leadership and management team, we develop a step-by-step implementation roadmap that outlines the actions, initiatives, and timelines required to achieve cultural transformation. This is highly visualized. People make decisions based on what they see and how it feels. The data supports that visualization and enables us to redirect action to better align with the anticipated goals.

Engaging Stakeholders

Engaging employees and leadership throughout the process is essential. We assist in creating strategies to involve stakeholders, solicit feedback, and build buy-in for the cultural change initiative.

Case Studies

1. A Healthcare Client That Needed To Transform Its Organization

In my book, On the Brink: A Fresh Lens to Take Your Business to New Heights, I share the case study of an organization that knew it needed a major culture overhaul. The CEO was signing every check. Ideas had to move slowly up the chain of command before being evaluated, tested, or acted upon. It was a Midwest safety-net hospital serving the uninsured and people experiencing poverty , with a highly diverse group of physicians and nurses. All of this led to a complex culture where the values and beliefs reflected a wide array of cultures and lifestyles as much as they reflected the medical center's way of doing things.

Leadership was very open to using the OCAI to assess their culture and adopt changes that could move it forward in a more modern way. Almost 65% of the employee base took the OCAI, as well as most of the board of trustees. By and large, they thought that the organization was far too controlling. They wanted to become more collaborative, creative and innovative.

Then the work began. What did becoming more "collaborative" mean? One example: Would housekeeping change the linen on the beds of discharged patients faster so that other patients from the Emergency Center could occupy those rooms? What did becoming more creative mean? Could doctors or nurses work together to revamp procedures to serve the patient or each other better?

Predictably, the vision of a future culture became a challenge for the current one, where habits and long-standing routines drove what people did and were thought to be "just fine."

A new CEO took over, and we completed our part of the project. However, we both knew the changes would require significant leadership commitment to building a new culture for a future where the workforce would demand it.

2. A Cement Company in Mexico

An old, successful, expanding cement company in Mexico was referred to us to help them address a significant problem. They were growing in the U.S. and needed help recruiting and retaining young staff in the corporate headquarters in Mexico and America. The generational differences were profound. The older, established leadership and management ran the company with a hierarchical, rules-driven culture. When they all took the OCAI, this became very apparent. Rules ruled, and they believed that the processes they had initiated many years before were essential to sustain the quality of the products they created. When we met with them, it became pretty clear that silos were able to keep

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different parts of the organization from working together. Their belief in the power of these barriers was recognized but difficult to address.

From the Human Resources perspective, there needed to be more connection between how the company was run and the expectations of their new hires. Younger staff wanted more teamwork and collaboration. They wanted to be listened to and empowered to suggest ideas that could be evaluated and implemented. The new hires were well-trained in academic skills, less so in applying those skills. But they were the future employees. The company had to accept that it must refocus how it got things done, trusting that new ways to build teams could provide a productive environment for both business and staff.

While their OCAI advocated for more collaboration and teamwork, the preferred culture advocated for more innovation and creativity. These were difficult words for the company to embrace. Like our healthcare client, the idea that new people had better (or maybe just new) ideas and innovations was challenging for those working there for many years.

While it was time for deep reflection and slow transformation, the HR team decided to focus on building a more collaborative organization, even using the ideas of a soccer team as a model for action. Innovation would come in due course as they began to see the benefits of better working conditions.

3. A Casket Manufacturer

This client was an exciting client that we enjoyed working with. They were watching sales of their core business, funeral caskets, declining, so they began to invest in other types of companies different from the original business. As they made their acquisitions, they changed the management of each newly acquired company but needed to get the kind of topline or bottom-line growth they had anticipated.

We worked with their team across all the companies to conduct a thorough culture assessment. The results of the OCAI were a window into the CEO's challenges. He believed an organization would be most effective with tight rules, processes, and a focus on results. He was a competitor and believed that they should be outbidding their competition and winning market share. In addition, the procedures he had put into place were operating at half the speed he thought they should be.

When we compared the cultures of those firms he had acquired, he realized that they were all the products of family-firm models. Strong leaders had previously run these acquisitions focused on teamwork, collaboration, and caring about each other. Results were essential but not the critical driver. Furthermore, they encouraged innovation and idea generation, supporting risk-taking and mistakes.

Processes were the last thing they focused on, and they needed more interest in a process-driven future culture. They knew they needed more processes, but if they all worked together, they could deliver the desired results.

The corporate management team was immediately struck by the value that the acquired firms could provide, albeit in ways different from the expectations of the CEO.

As we handed off the project to the internal teams, the essential wisdom was to capitalize on the talent of the newly acquired companies to change their cultures gradually. If the leadership team expected a process-driven, rules-focused culture, it would be a tough "row to hoe." But if they capitalized on their collaborative skills and teamwork, those core values and strengths, they might find new ways to grow with their acquired talent.

Conclusion

Cultural transformation improves employee satisfaction, productivity, innovation, and business performance. It also enables organizations to successfully adapt to changing market conditions and challenges.

However, it is important to recognize that cultural transformation is not a one-time event but an ongoing journey. Simon Associates Management Consultants stands ready to partner with organizations to nurture and evolve their cultures to continuously meet future demands.

We offer a comprehensive approach to assessing, diagnosing, and transforming corporate culture, and we look forward to discussing your challenges with our team of culture change experts to see how we could best help you adapt your culture to these fast-changing times.

About Andi Simon

Andrea (Andi) Simon, Ph.D., corporate anthropologist, author, and executive coach founded Simon Associates Management Consultants (SAMC) over two decades ago to bring the unique perspective of anthropology to businesses and organizations that need or want to change. As a culture change expert and trained practitioner in Blue Ocean Strategy®, she helps a diverse range of organizations "see, feel and think" in new ways, finding better solutions for their current customers and "big ideas" to attract future ones. Contact SAMC to find out how Andi and her team can help your organization drive change, overcome challenges and reach your potential for success. Subscribe to Andi's podcast: On the Brink with Andi Simon and hear how you can move off the brink and soar!

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Andi has authored two award-winning books: *On the Brink: A Fresh Lens to Take Your Business to New Heights* and *Rethink: Smashing the Myths of Women in Business*. Her third book, *Women Mean Business: Over 500 Insights from Extraordinary Leaders to Spark Your Success*, co-authored with Edie Fraser and Robyn Freedman Spizman, is being called the women's business book of the decade. To order your copies, click on the images below: