

## Assessment Program

Technocery's Assessment Program is designed for executives and leaders of client and functional organizations. We provide both qualitative and quantitative perspectives of how people, programs, and processes are performing in achieving business goals and fulfilling key outcomes.

### Overview

In the age of radical connectivity, companies, organizations, and institutions are being disrupted by the power of individuals and inventors to create entirely new markets. At the core of challenges that most teams face is an essential need to shift from concept to customer-centricity and evolve an organization beyond its go-to-market foundations through scale. Technocery's extensive experience advising and guiding corporations, non-profit organizations, and government agencies is anchored upon a disciplined methodology of continuous improvement, beginning with detailed discovery. Our Assessment Program is typically delivered over 30, 60, and 90-day cycles to arm leadership teams, boards, functional organizations, and their departments with the insights to prioritize and execute on key departmental initiatives to drive success.



### Program Details

Technocery provides your organization with a comprehensive understanding of how your teams, management, and leadership are set up for success. Our Assessment Program achieves this through a multi-phase approach that audits your company's go-to-market or institution's theory-of-change, establishes the criteria necessary for successful opportunity pursuit and confrontation of challenges, and identifies an action plan to address critical gaps in capabilities and strategies. The diagnostics begin with a thorough discovery process that illuminates the total landscape of your people, programs, and processes, and compares and contrasts them with both industry benchmarks and the competitive space.

- **Audit**  
Discovery process consisting of an initial strategic planning meeting ("kick-off") with your organization's leadership team and key functional stakeholders, follow-up interviews with managers and individual contributors, and a review of underlying financial, performance, and metric data sets across company systems.
- **Evaluation**  
Assessment of your organization's performance against industry benchmarks, establishing a view of how your corporate entity compares with the competitive

landscape. Our **Report of Findings** summarizes our audit and creates alignment among stakeholders and audiences on the current state of the organization, while the included **Scorecard** will outline focus areas and key pain points and prioritized areas of further investigation.

- **Analysis**

We conduct in-depth interviews, confirmatory discussions, and exploratory brainstorming sessions with your organization's functional leaders, department heads, team members, and, as appropriate, a selection of your clients and partners, to further validate initial findings and gauge avenues to amplify the impact of your team's future work. This analysis is conducted along the lines of the key focus areas appropriate to your company's execution in the marketplace, such as: operations, finance, client experience, product, sales, marketing, people and culture, and legal and administrative functions.



- **Synthesis**

We summarize our final conclusions and guidance in a **Recommendations Report**, delivered via a presentation that outlines our diagnosis and prescriptions for how your organization should proceed to improve its execution. Guidance includes both incrementally evolutionary action plans as well as holistically revolutionary frameworks to drive optimization. Specific attention is on the people (the knowledge, skills, and abilities necessary to execute work, as well as the behavioral competencies necessary for roles to be successful), programs (the systems and tools that provide the requisite transparency and accountability for performance), and processes (the workflows, standard operating procedures, and rules of engagement).

- **Exhibits**

As a part of furnishing your organization with our recommendations, Technocery will also provide customized artifacts tailored specifically to your teams so that they can begin executing successfully immediately, with an eye towards monthly progress against quarterly objectives with key results. These exhibits may include a Customer Journey, a workforce Competency Model, a constituent Engagement Framework, Financial Segmentation Reports, Utilization and Capacity Plans, and/or corresponding Go to Market Playbooks for Sales, Marketing, and Client Success.

**Get in Touch.** Email: [connect@technocery.com](mailto:connect@technocery.com). Phone: (617) 334-5826.