

ChangeWorks![®]

Personal & Professional Change Management System

2010 ChangeWorks[®]
Reliability and Heuristic Study
1st Quarter Results



About this study:

This study focuses on the ChangeGrid® — a non-traditional coaching and management tool designed to explore individual and group performance and productivity through a highly client-driven, activity-specific approach.

The purpose of the study is to document the accuracy of the ChangeGrid®, establish baseline performance metrics for our team of ChangeWorks professionals and explore the ChangeGrid's practical value across a variety of applications.

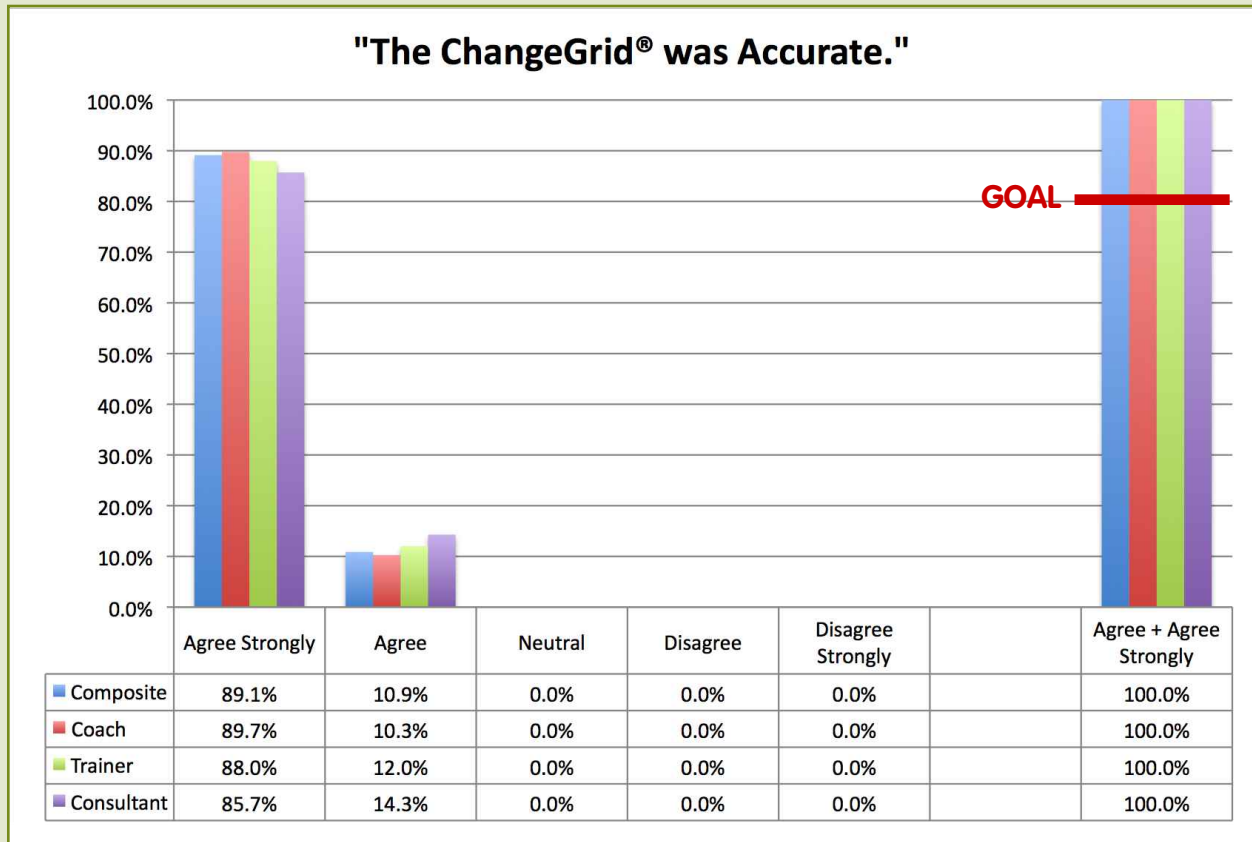
In order to participate in the study, volunteers had to meet three criteria. First, they had to be in full-time, private practice as a human development professional (coach, trainer or consultant). Second, they had to have been in practice for more than a year. Third, they had to be willing to complete all three steps of the study's process.

The steps required a total of 60 minutes or less of each participant's time:

- 1) First, participants were asked to complete a short ChangeWorks® Profile. For this study, we prepared a customized activity list, focused on 15 core business development aspects of building a private practice in the human development industry. Participants were asked to consider each activity, then rate the levels of Ability, Challenge and Importance they associated with each. (10 minutes)
- 2) Next, they were asked to participate in a private debriefing of their results with the creator of the ChangeWorks® System, T. Falcon Napier. (30-40 minutes)
- 3) Finally, participants completed a short feedback session with a research assistant, providing their input on six key questions about their experience. (10 minutes)

As of date of this report, **46** professionals have completed the study, **85%** of whom identified themselves as **coaches**, with an average time in private practice of **10.84** years. We have combined the results of the participants' ChangeGrids and feedback sessions and prepared this 1st Quarter 2010 Report. When the study is complete, this report will convey the feedback of a total of 500 participants.

The report is divided into 2 sections. The first provides the results of the feedback sessions, The second presents a detailed analysis of ChangeGrids completed by the participants.

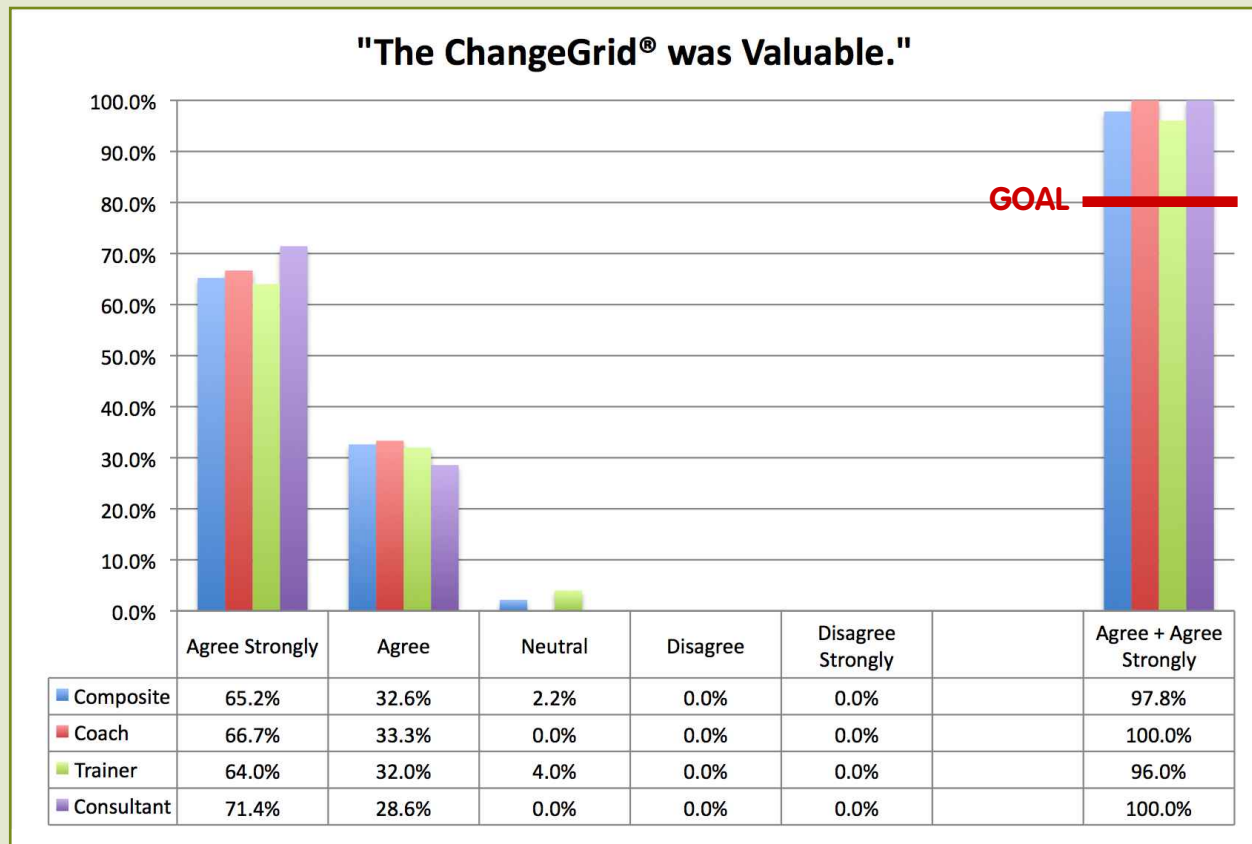


Question #1:

"How much do you agree with the following statement: "The ChangeGrid reading was accurate."

Commentary:

We couldn't be happier with this result! Across all three disciplines, the answer was unanimous agreement. The highest score came from coaches, almost 90% of whom Agreed Strongly that the ChangeGrid was accurate. Agree and Agree Strongly responses combined exceeded our goal by 25%.

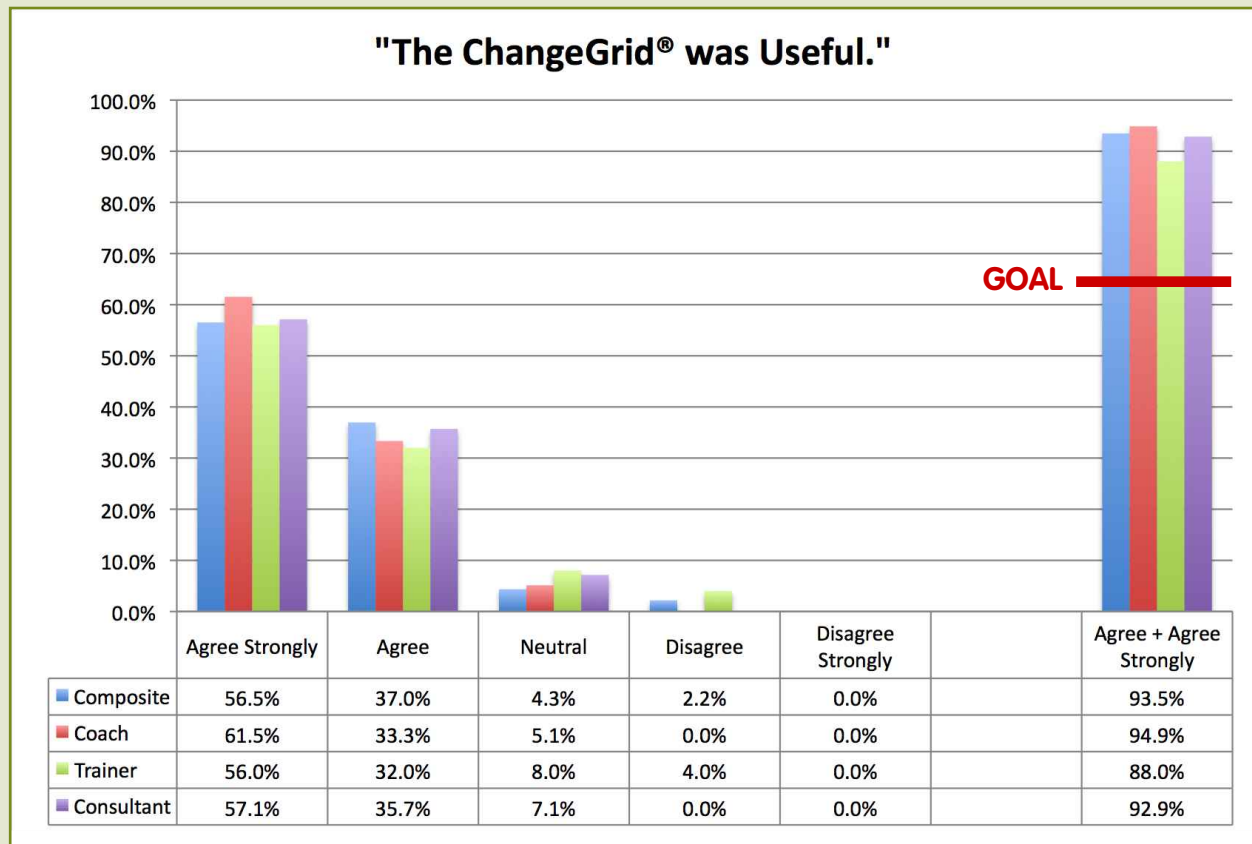


Question #2:

"How much do you agree with the following statement: "I found the ChangeGrid reading valuable."

Commentary:

While accuracy is a wonderful thing, all by itself it accomplishes very little. We want to know that respondents received something valuable to them — insights, understandings, confirmations, inspirations — SOMETHING that advances their progress. Here again, the results reflect overwhelming support for the ChangeGrid as a tool that delivers value to those who experience it. Agree and Agree Strongly responses combined significantly exceeded our goal among all three populations.



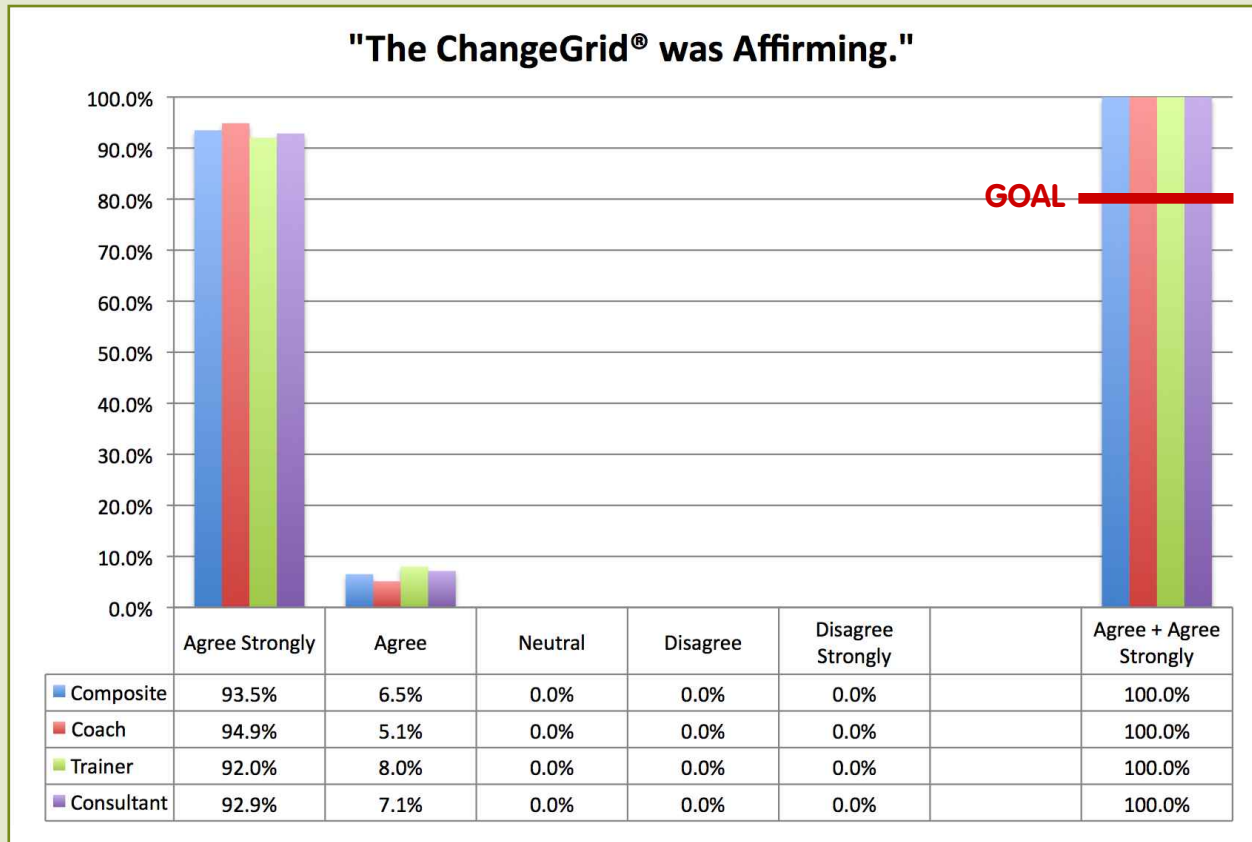
Question #3:

"How much do you agree with the following statement: "I believe the ChangeGrid would be useful to my clients."

Commentary:

We recognize that each human development professional is building a unique practice that may or may not offer an opportunity for the ChangeGrid to be put to productive use. With that in mind, our hope is that two-thirds of the professionals who experience the ChangeGrid will see a useful place for it in their practices. Coaches here again were most emphatic in their support, with nearly 95% of them seeing its usefulness. Across the three populations, we exceeded our goal by 40%.

I do find it curious that trainers gave the lowest score — a nevertheless goal-exceeding 88% — since the tool was originally developed specifically FOR trainers. Perhaps this is a reflection of the way in which the ChangeGrids are debriefed for the study participants, since little or no mention is made about HOW the ChangeGrid can be used as a pre-training needs assessment or as a tool of measuring progress among trainees.

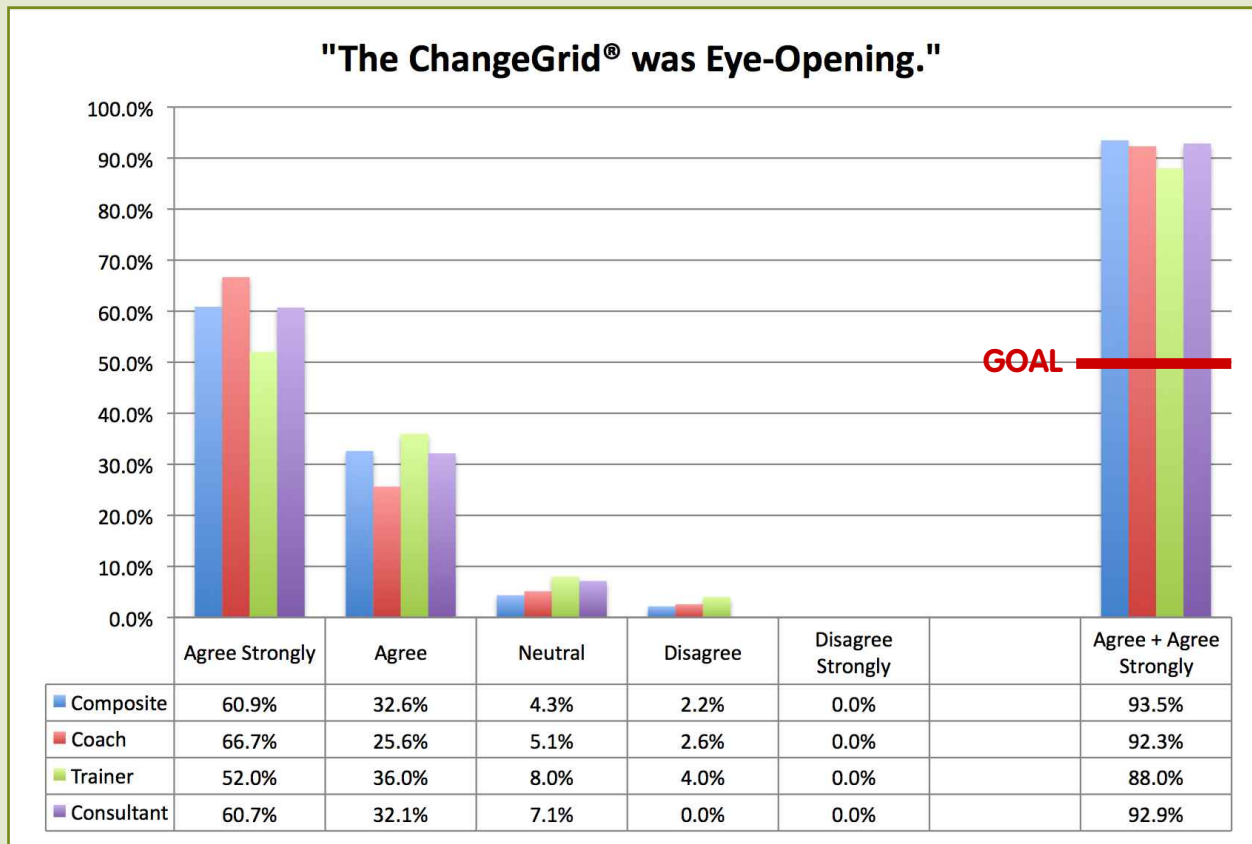


Question #4:

"How much do you agree with the following statement: "The ChangeGrid affirmed things I suspected."

Commentary:

One of the ChangeGrid's key outcomes is that it reflects a respondent's situation in a way that affirms and confirms what the respondent is thinking and feeling. Here again, the participants in the study are in total agreement. The results exceeded our goal by 25%.

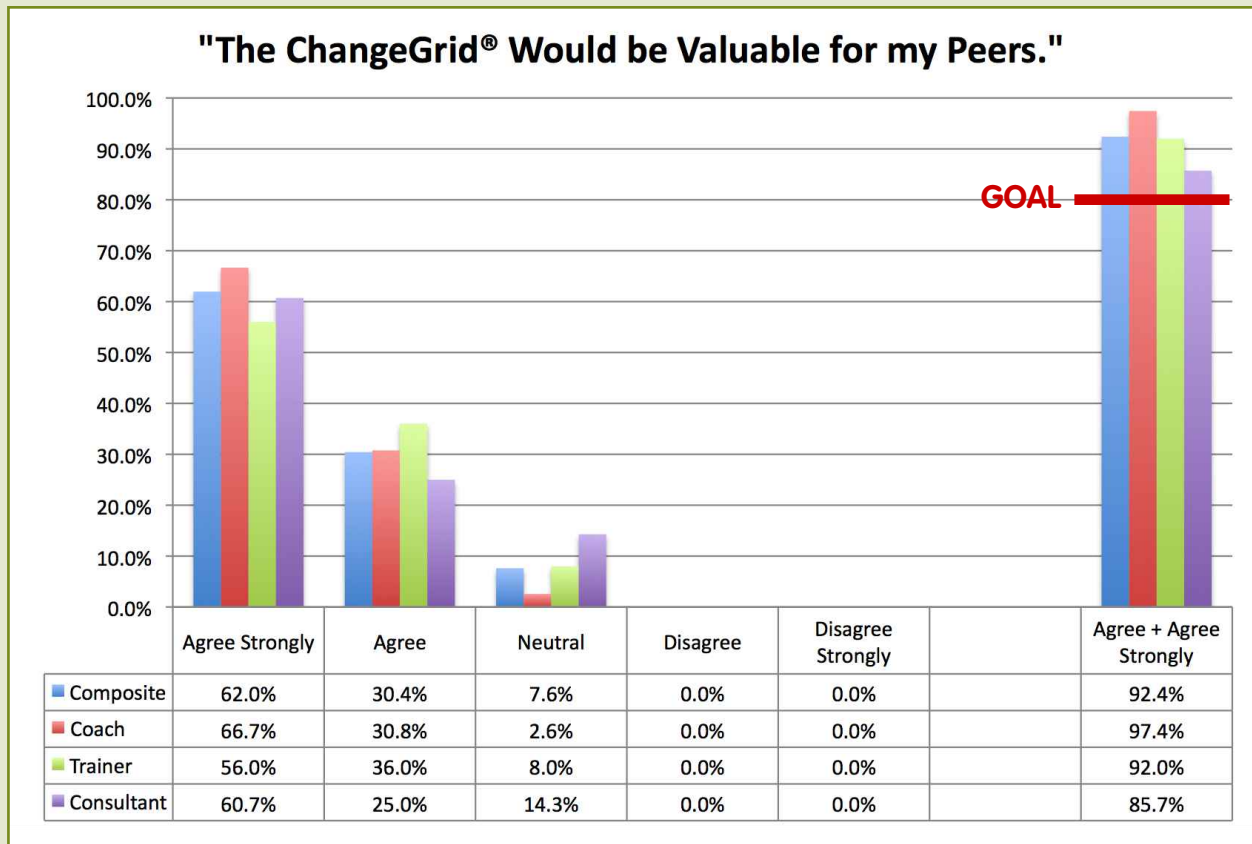


Question #5:

"How much do you agree with the following statement: "The ChangeGrid opened my eyes to things I had not seen before."

Commentary:

While it is NOT always the case, the ChangeGrid can be very beneficial in helping respondents see and understand aspects of their situations they had not realized before. Our goal is that respondents have an eye-opening experience at least half of the time. In the case of the study participants, that goal was exceeded by 87%. Perhaps we have set our expectations too low on this question.



Question #6:

"How much do you agree with the following statement: "The ChangeGrid would be a valuable tool for my peers to incorporate into their work."

Commentary:

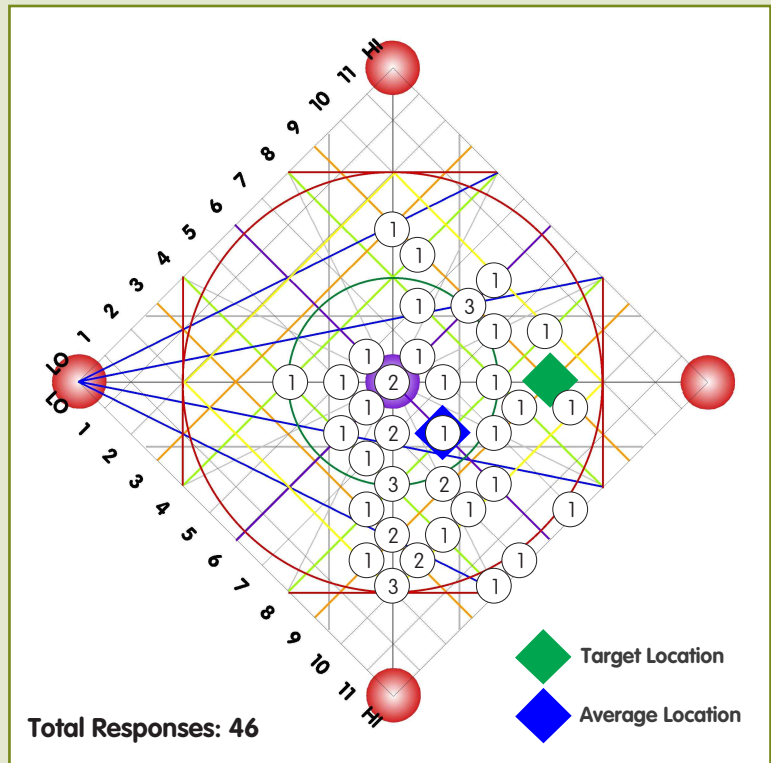
For this particular question, we asked participants to think about only those colleagues who were operating practices and working with client populations similar to their own. While the results exceeded our goals across all three disciplines, it is interesting to note that coaches in particular felt very strongly about the value the ChangeGrid offers to their peers with more than 97% agreeing or agreeing strongly.

Activity #1:

“Identifying the ideal prospect base for my services.”

Activity Description:

“To build a robust practice, you must identify a segment of the marketplace that is both desirable AND viable. That means that your ideal prospect is not only someone you would enjoy working with but must also be in the position to engage your services. Targeting a population that needs your help but isn’t sufficiently large enough to build a business around — or isn’t ready, willing and able to hire you — just isn’t going to work.”



Results:

Perceived Ability:

Average	7.83												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	1	2	3	9	5	7	7	9	0	3
Percentages									59%	15%	26%		

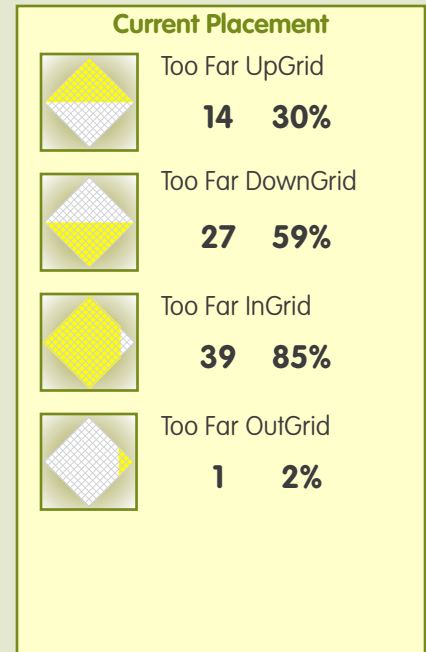
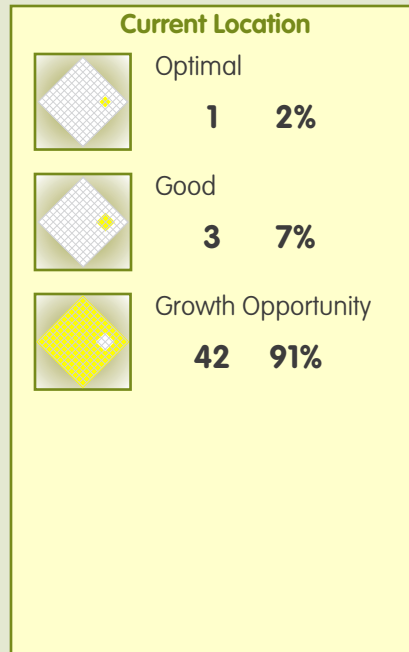
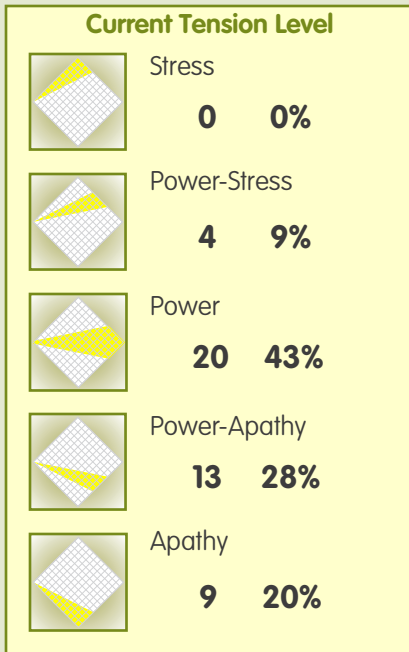
Perceived Challenge:

Average	5.65												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	4	5	8	8	5	4	3	7	2	0	0
Percentages									81%	15%	4%		

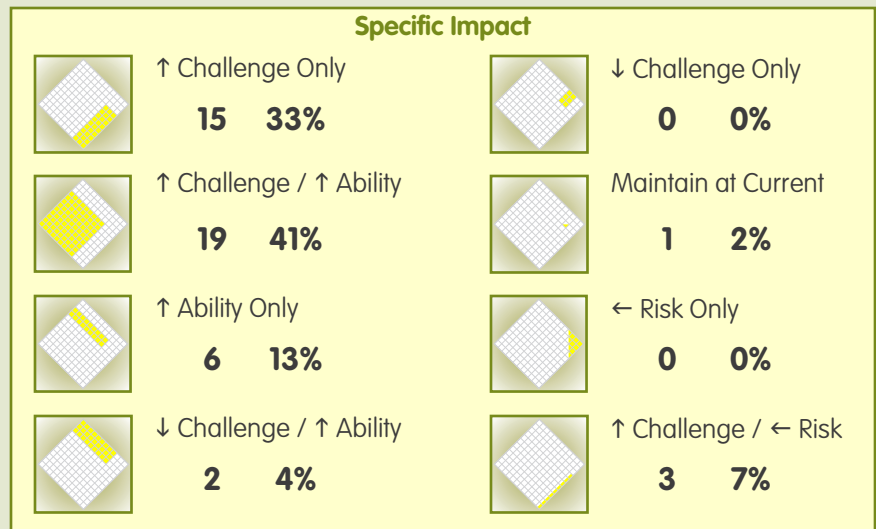
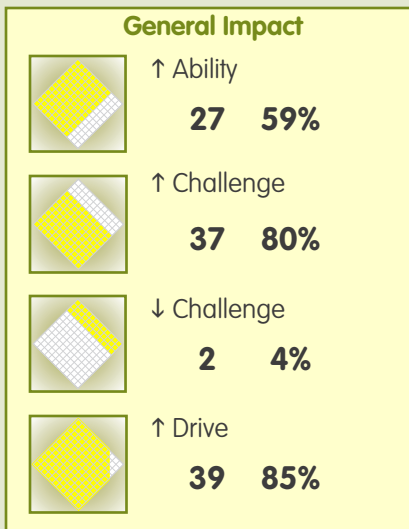
Perceived Importance:

Average	10.74												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	0	1	0	1	1	0	1	15	6	21
Percentages										7%	93%		

Analysis:



Action Planning:



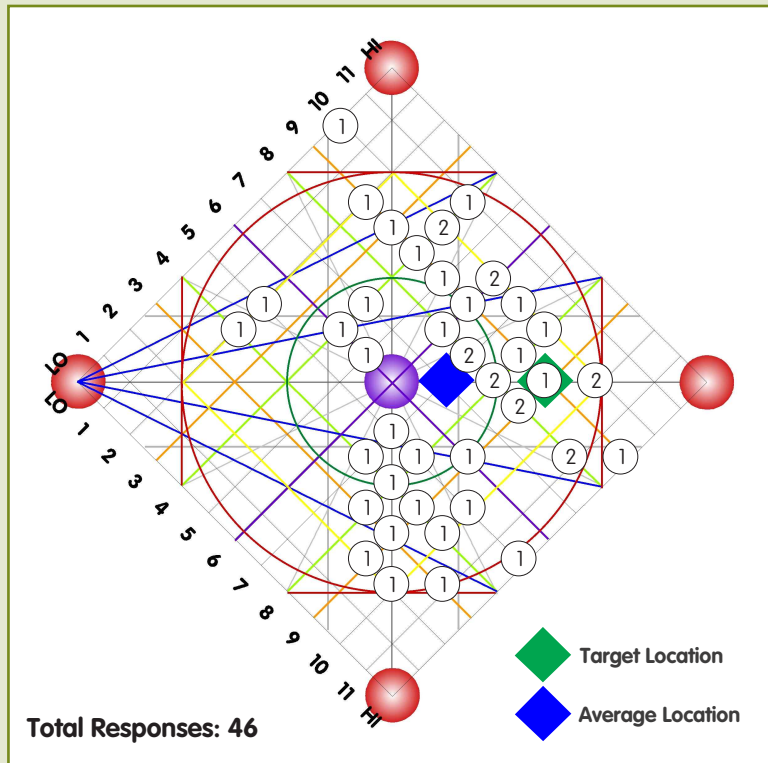
Commentary:

Activity #2:

“Marketing my services successfully to my ideal prospects.”

Activity Description:

“Finding the quantity and quality of clients you want most is the result of a well-conceived and well-executed marketing strategy. The ideal marketing strategy generates inquiries in excess of your capacity to handle the work, and keeps you in the position to choose to work with those prospects that best meet your criteria. Do you have a plan? Are you working your plan? Is the plan working for you?”



Results:

Perceived Ability:

Average	7.13												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	1	0	3	1	6	2	4	5	7	7	5	3	2
Percentages								63%	15%	22%			

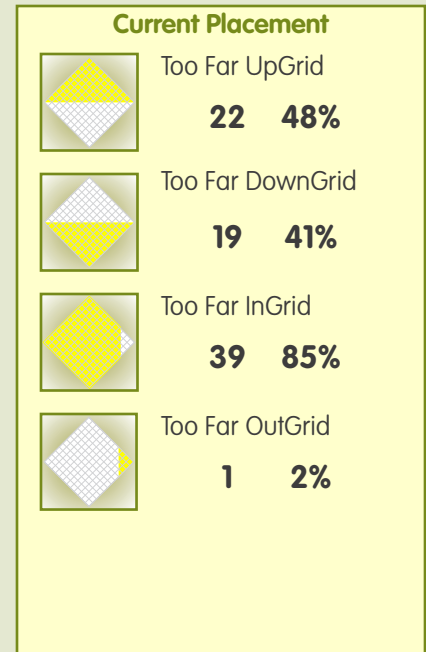
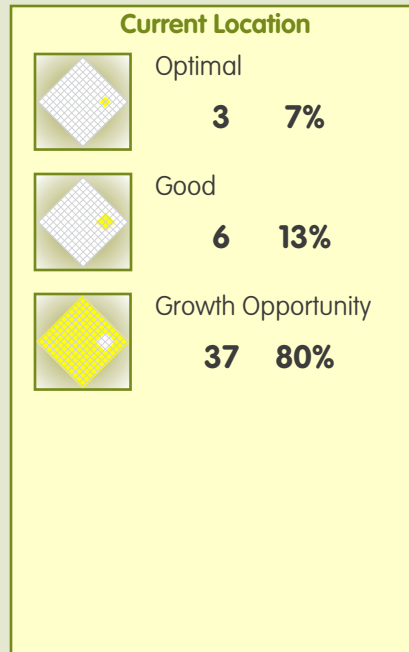
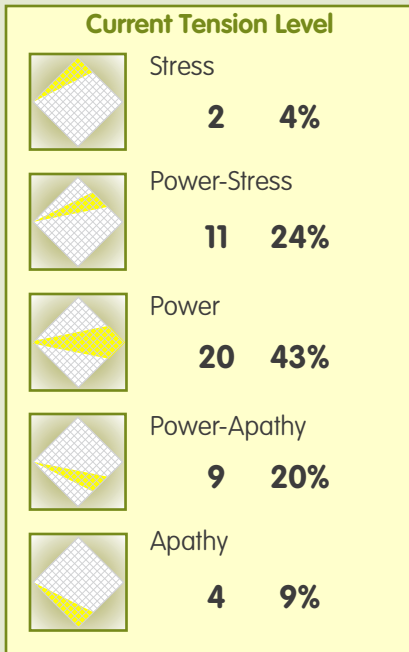
Perceived Challenge:

Average	7.13												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	2	3	5	5	3	1	9	8	9	1	0
Percentages								61%	17%	22%			

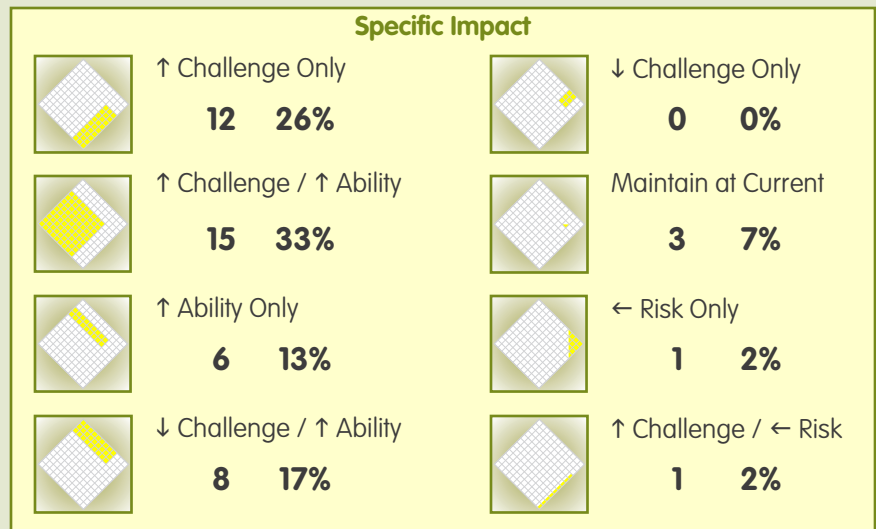
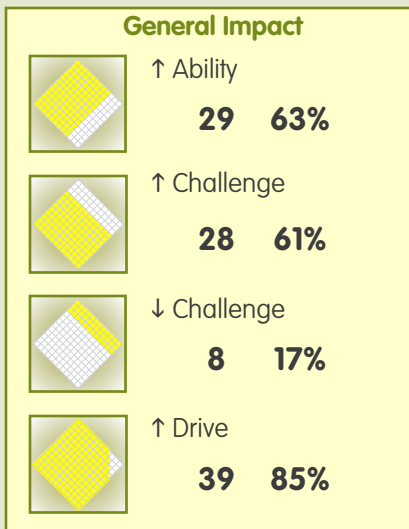
Perceived Importance:

Average	11.24												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	0	0	0	1	0	0	1	10	6	28
Percentages								2%	98%				

Analysis:



Action Planning:



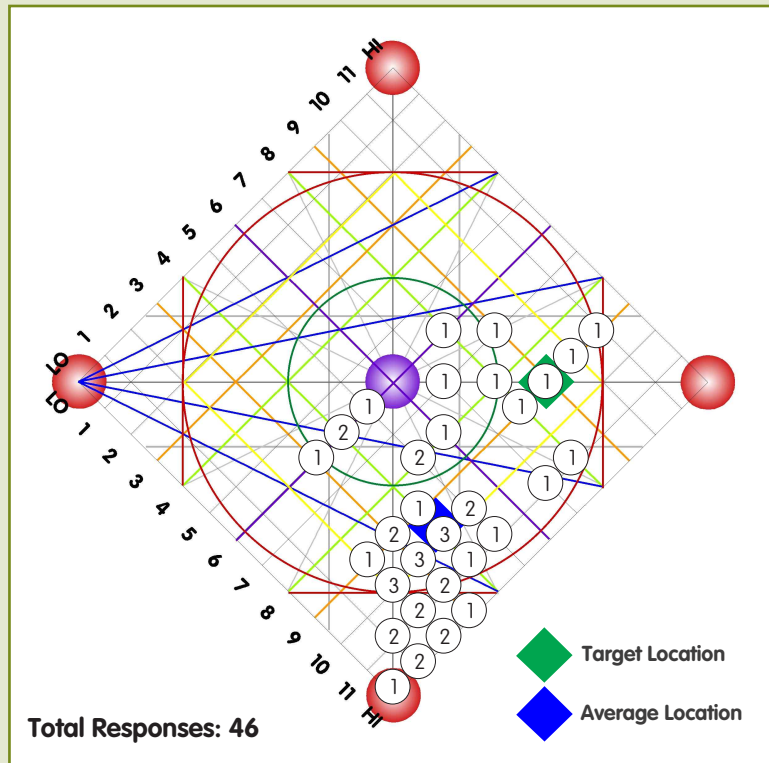
Commentary:

Activity #3:

“Helping my prospects identify mission-critical issues.”

Activity Description:

“One of the most powerful skills you need to master in order to build your client base is the ability to help your prospects clearly identify and OWN their situation. Whether it’s a set of challenges to overcome or opportunities to seize, clarifying your client’s mission-critical activities is the fuel that drives the decision to engage your services – and keeps your client moving forward in their work with you.”



Results:

Perceived Ability:

Average	9.57												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	0	0	0	5	2	4	8	11	10	6
Percentages									24%	17%	59%		

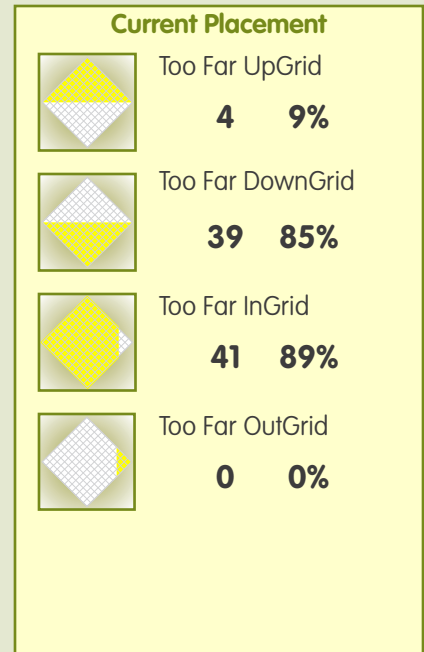
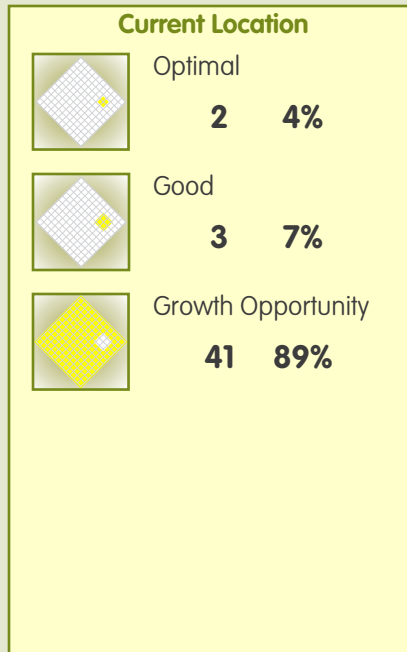
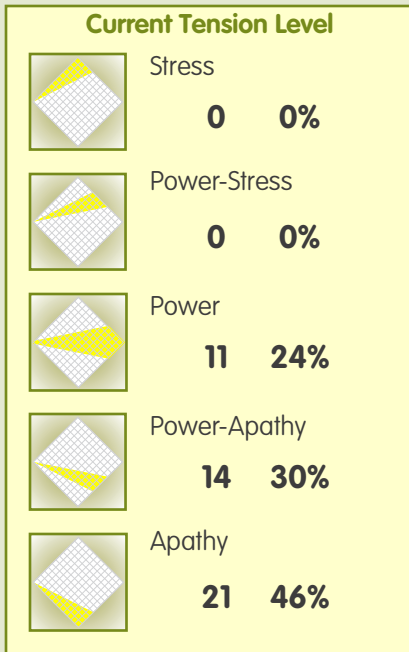
Perceived Challenge:

Average	4.26												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	1	4	8	9	7	6	1	2	4	2	1	1	0
Percentages									92%	4%	4%		

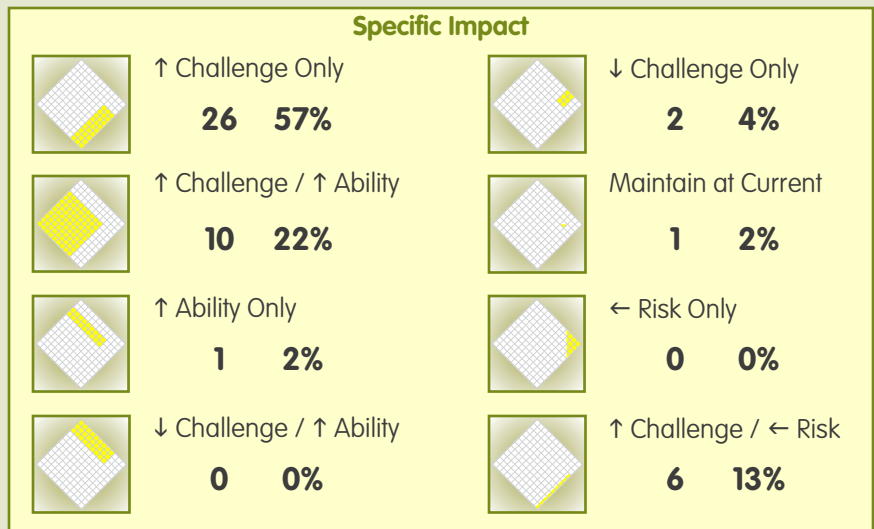
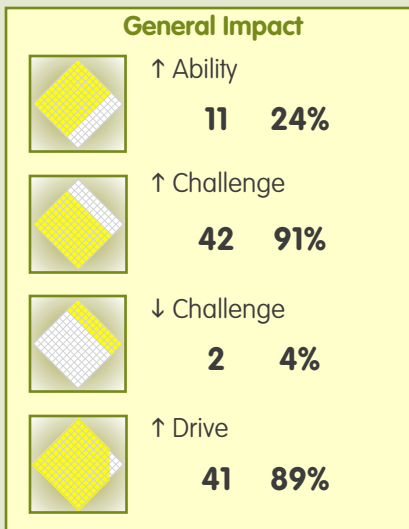
Perceived Importance:

Average	10.41												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	1	0	0	1	0	3	2	3	7	10	19
Percentages									15%	85%			

Analysis:



Action Planning:



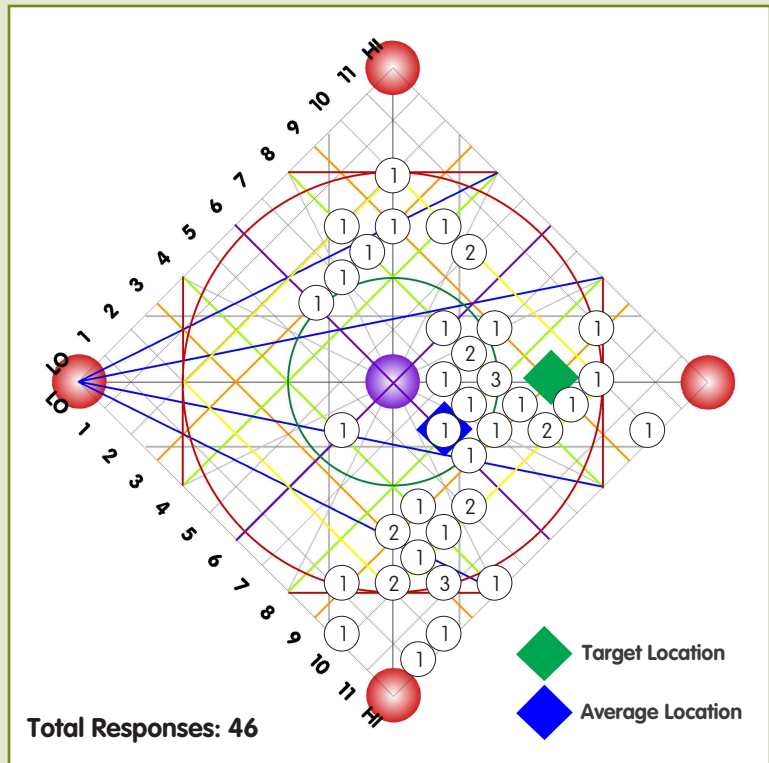
Commentary:

Activity #4:

“Presenting my services in a way that powerfully engages the prospect.”

Activity Description:

“One of the biggest reasons prospects don’t engage the services of a human development professional is because they don’t understand the process or the qualitative and quantitative value of those services. Having the ability to clearly and concisely communicate your recommendations – and do so in a compelling way – is vital to the success of your business.”



Results:

Perceived Ability:

Average	8.11												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	2	4	1	2	2	4	5	8	11	3	4
Percentages									43%	17%	40%		

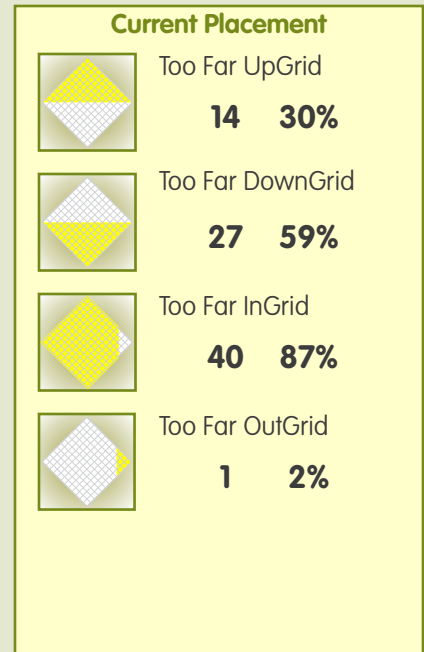
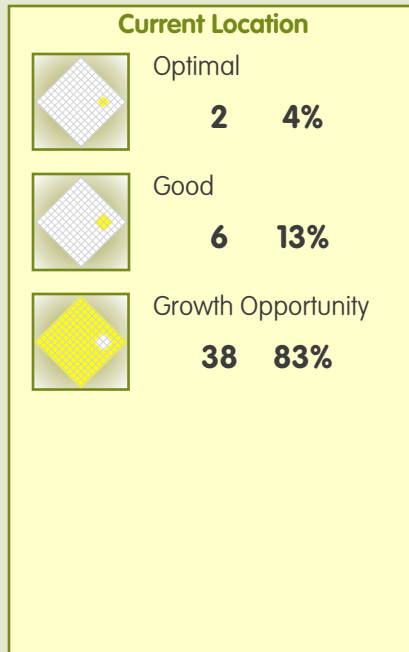
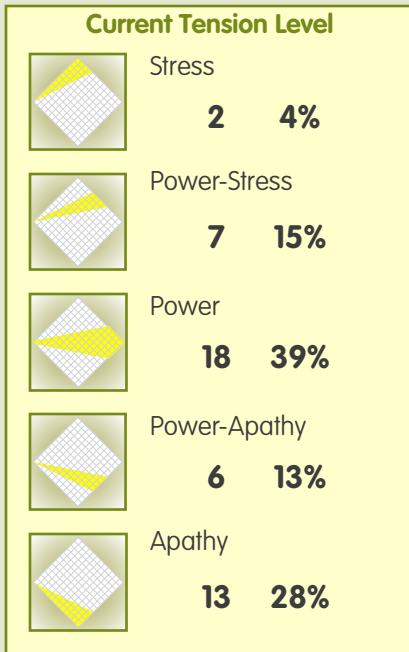
Perceived Challenge:

Average	6.17												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	1	2	3	6	4	2	3	4	11	3	6	1	0
Percentages									78%	7%	15%		

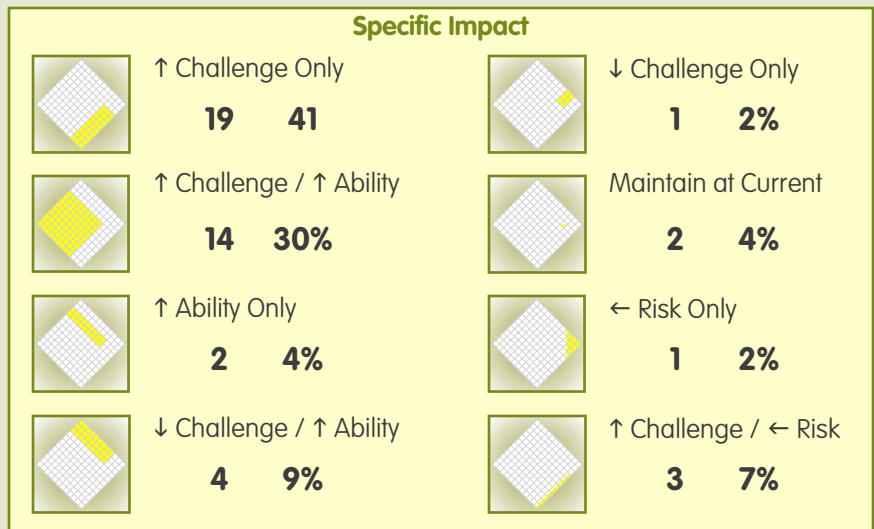
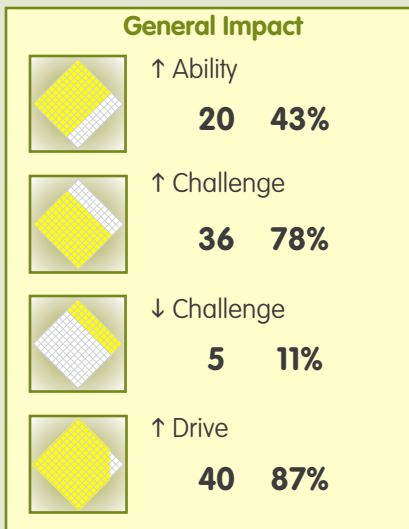
Perceived Importance:

Average	11.17												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	0	0	0	1	1	0	3	4	10	27
Percentages									4%	96%			

Analysis:



Action Planning:



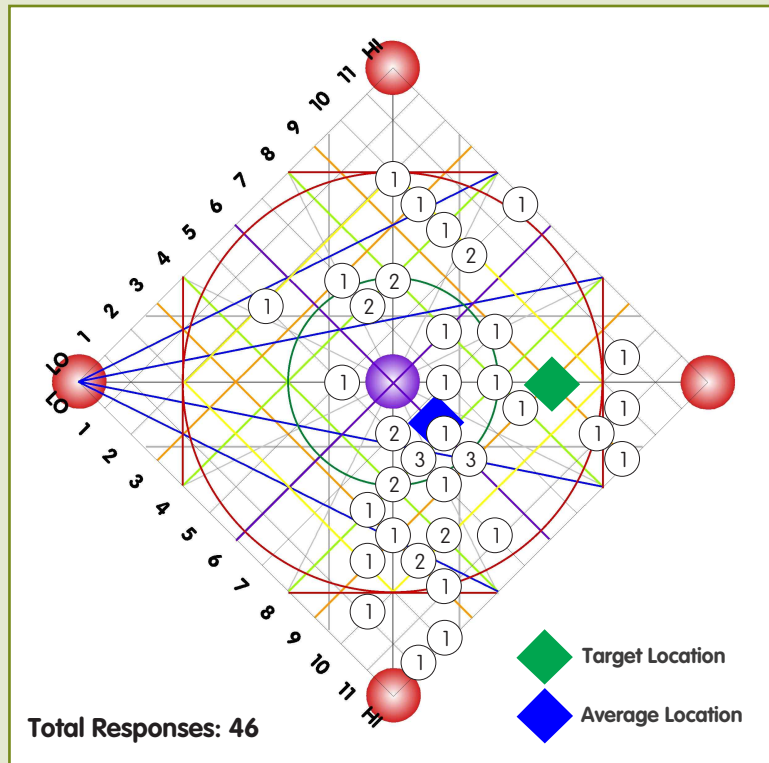
Commentary:

Activity #5:

“Articulating my competitive distinction with confidence.”

Activity Description:

“The truly successful professionals are the ones who have differentiated themselves from all others in their field and established a strong brand. Whether in a particular niche, because of the tools they have mastered, their reputation or their connections, they have created a marketable edge over their competition. How well have you set yourself apart from your peers? Why would a client do business with you instead of with someone else?”



Results:

Perceived Ability:

Average	7.63												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	2	2	5	4	1	4	8	7	6	4	3
Percentages									57%	15%	28%		

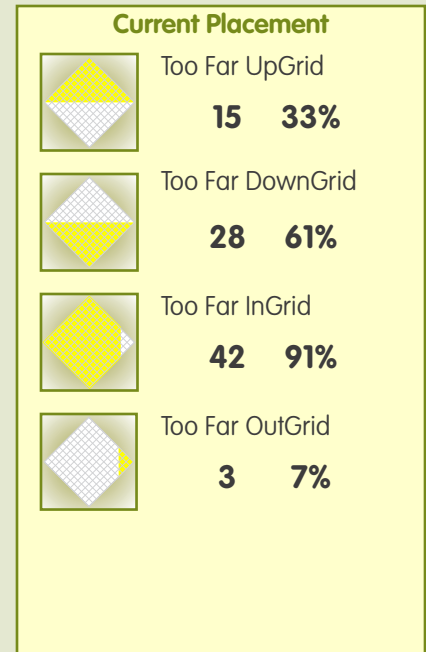
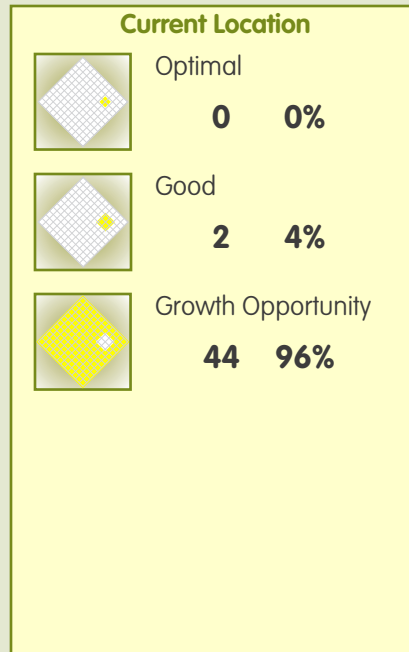
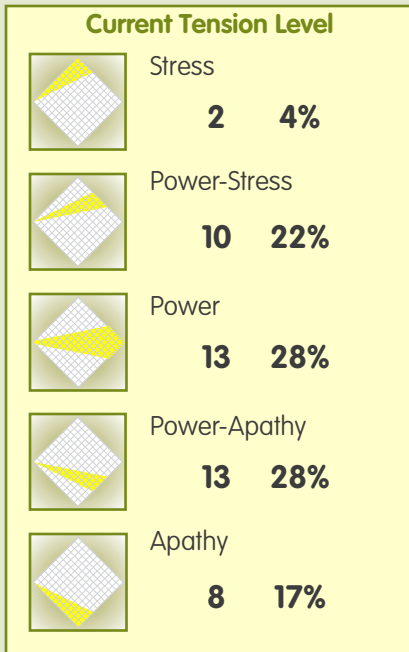
Perceived Challenge:

Average	6.17												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	2	2	5	4	9	4	4	5	3	6	1	1
Percentages									76%	7%	17%		

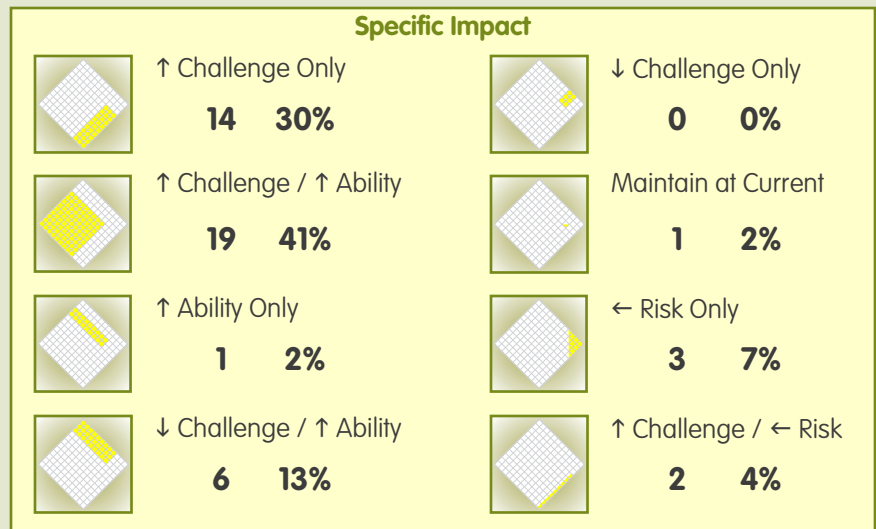
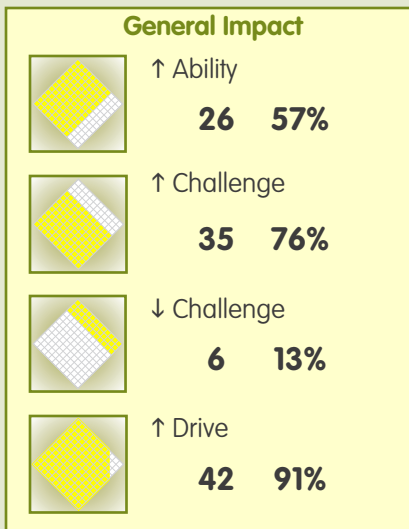
Perceived Importance:

Average	10.46												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	0	0	0	2	2	3	5	7	8	19
Percentages									15%	85%			

Analysis:



Action Planning:



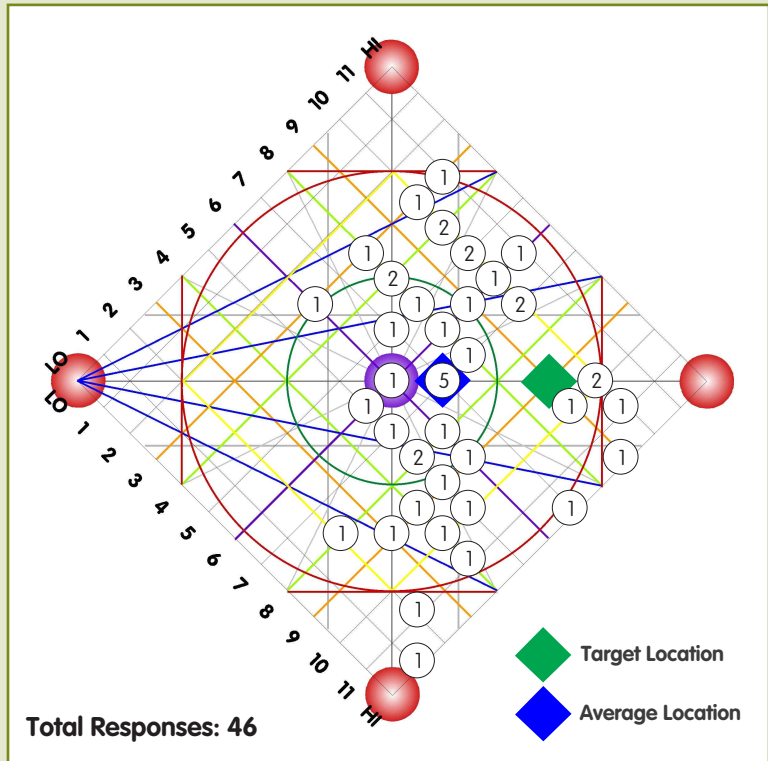
Commentary:

Activity #6:

“Converting most qualified prospects into clients.”

Activity Description:

“Generating an inquiry is one thing – converting that inquiry into a client is quite another. Many human development professionals struggle with the sales aspect of building their businesses, resulting in large blocks of wasted and uncompensated time, low closing averages and less-than-desirable ongoing revenue streams. Are you converting enough of your prospects into clients to meet your objectives?”



Results:

Perceived Ability:

Average	7.26												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	4	4	4	6	9	4	4	5	3	3
Percentages								67%	9%	24%			

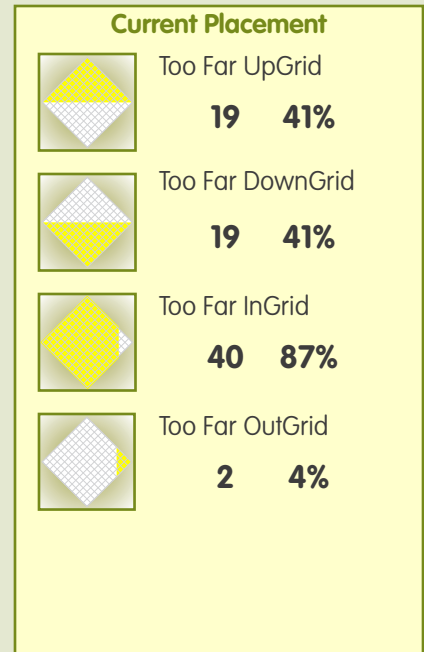
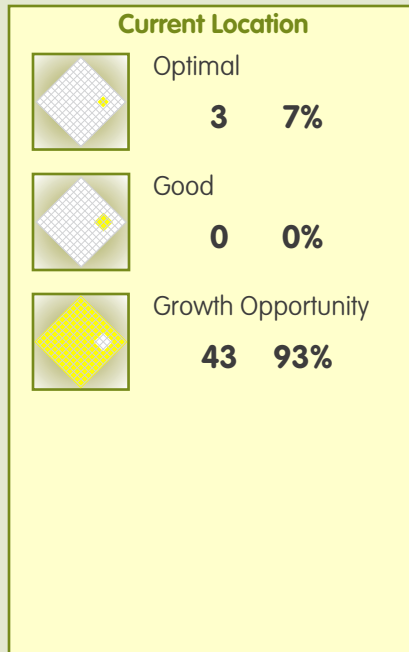
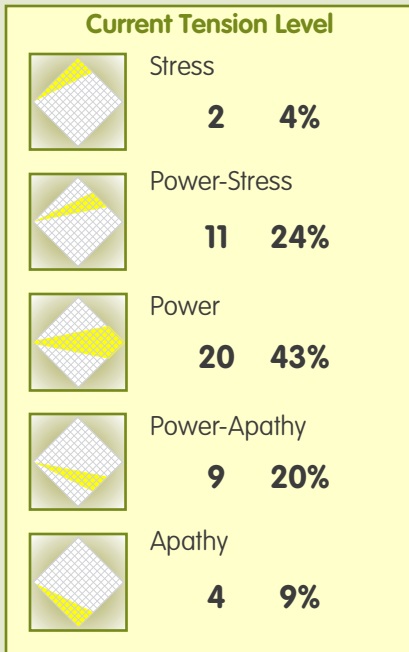
Perceived Challenge:

Average	7.17												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	1	2	1	3	6	4	7	6	3	11	2	0
Percentages								65%	7%	28%			

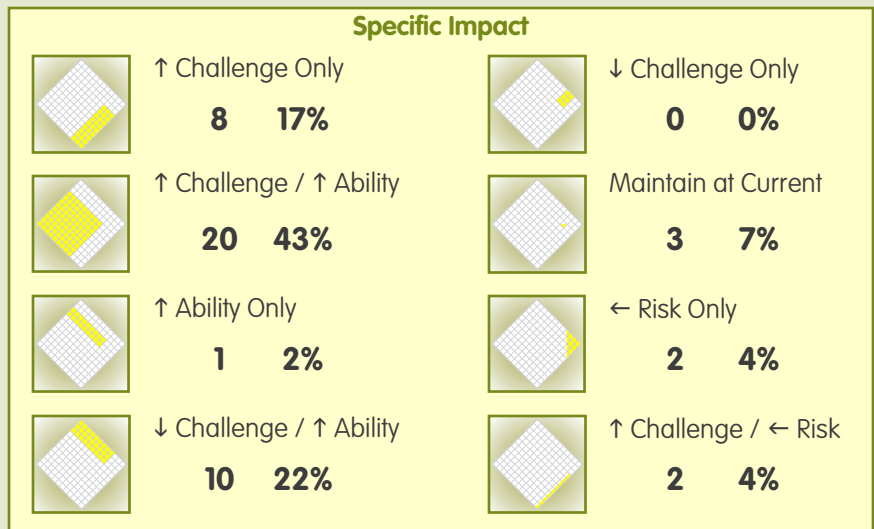
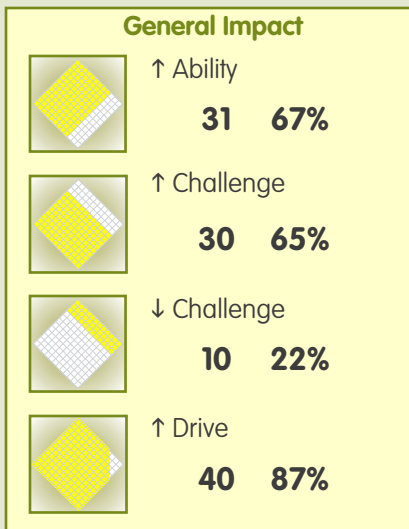
Perceived Importance:

Average	11.00												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	1	0	0	0	1	2	3	5	5	29
Percentages									9%	91%			

Analysis:



Action Planning:



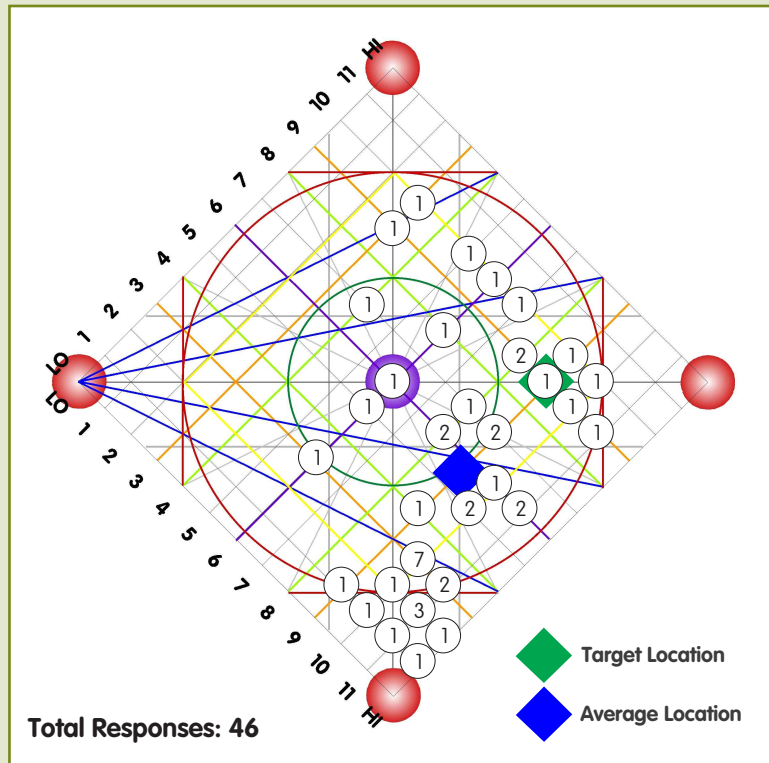
Commentary:

Activity #7:

“Defining a comprehensive scope of work with a given client.”

Activity Description:

“Once you have engaged a new client, it’s vital to establish the full scope of work that needs to be done — for both the client and the professional alike. A “needs assessment” defines the client’s current situation, desired situation and the gaps that need to be closed — and sets the stage for an appropriately long and mutually beneficial business relationship.”



Results:

Perceived Ability:

Average	8.89												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	2	1	1	5	1	5	6	14	9	2
Percentages									33%	13%	54%		

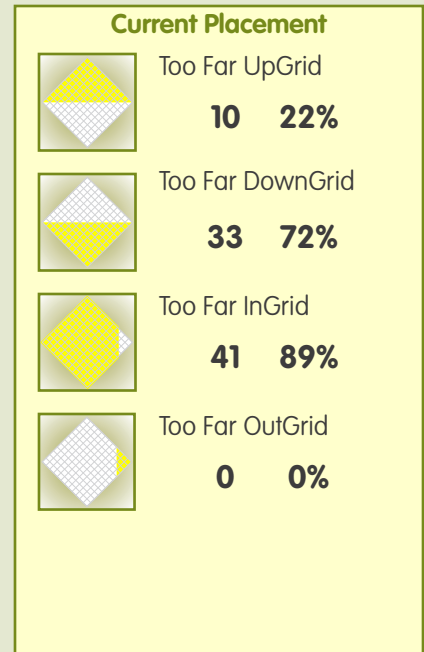
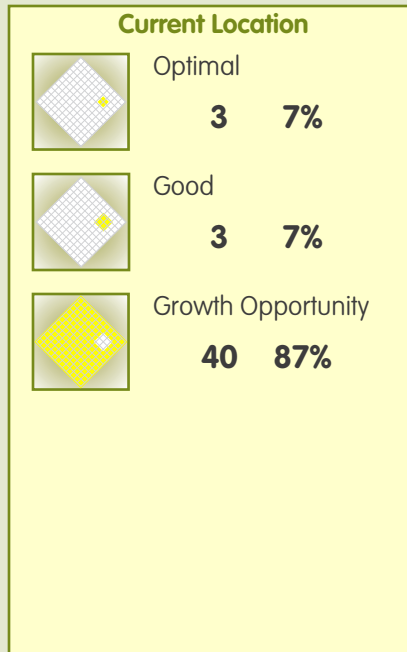
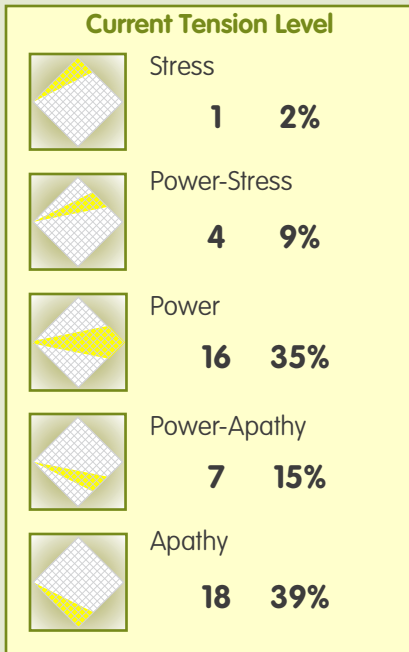
Perceived Challenge:

Average	5.41												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	4	5	10	1	3	6	4	1	6	6	0	0
Percentages									74%	13%	13%		

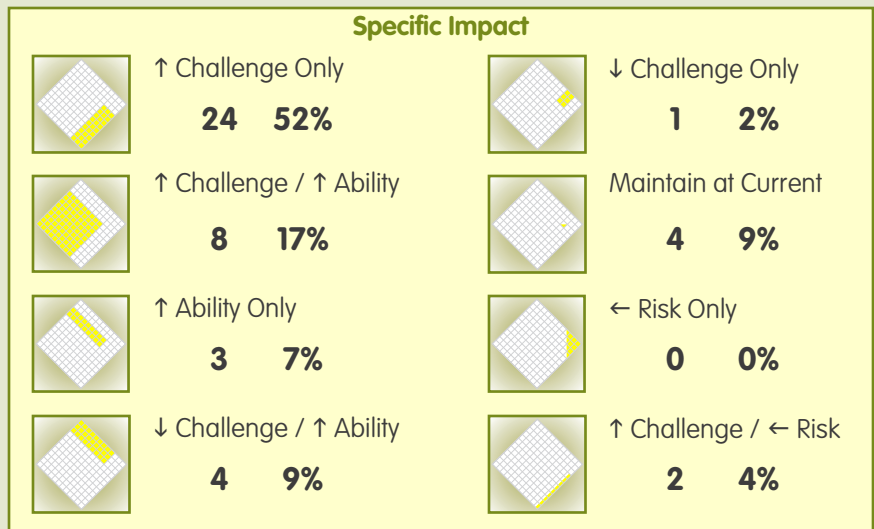
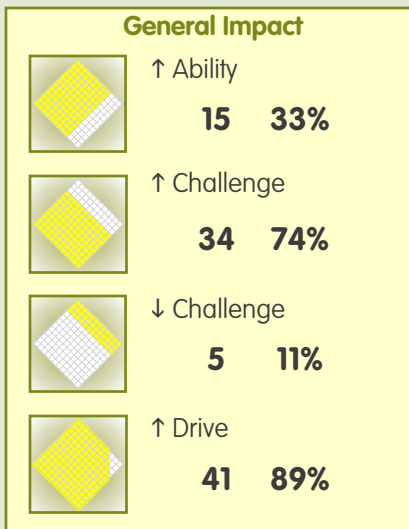
Perceived Importance:

Average	9.85												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	0	1	1	2	2	3	5	14	7	11
Percentages									20%	80%			

Analysis:



Action Planning:



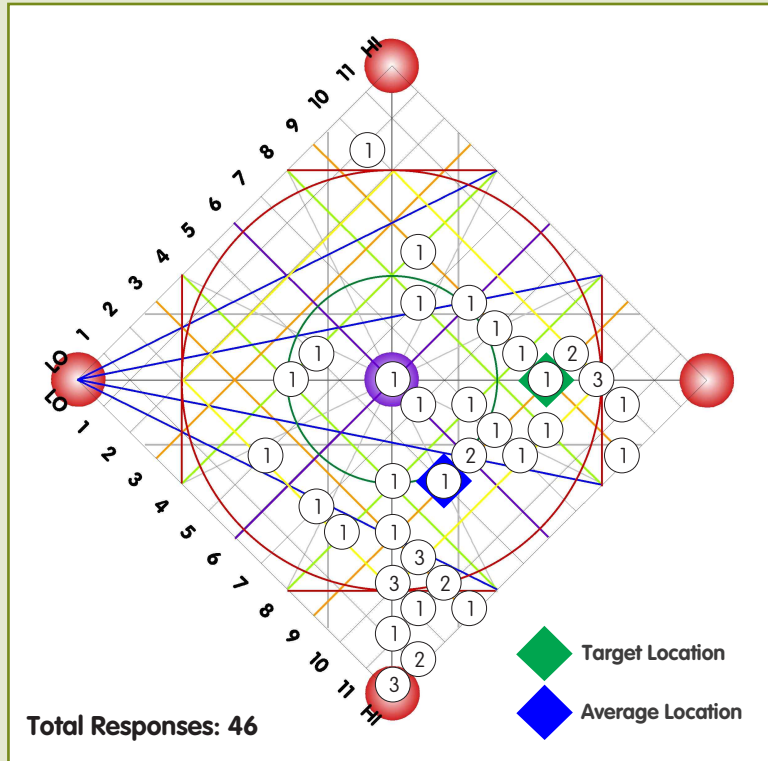
Commentary:

Activity #8:

“Ensuring clients follow through on action plans.”

Activity Description:

“Most human development professionals do a fine job of helping their clients identify desirable outcomes and developing strategies for getting there. While most clients make progress towards their desired situations, many lose focus and fail to reach their ultimate destination. The secret to building a truly successful practice is keeping your clients engaged in the work and executing the action plan.”



Results:

Perceived Ability:

Average	8.89												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	1	0	0	3	2	2	3	4	8	11	5	7
Percentages									33%	17%	50%		

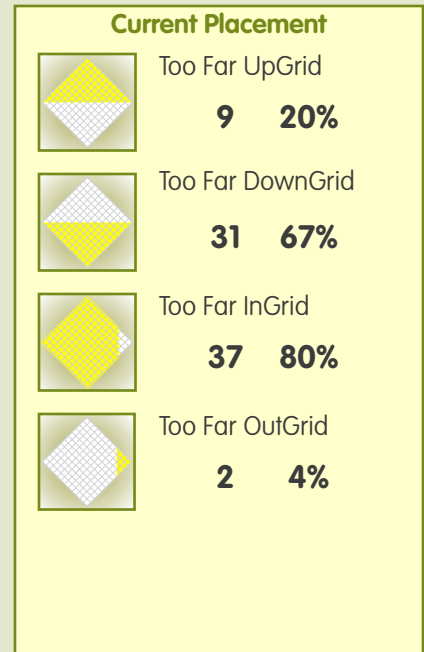
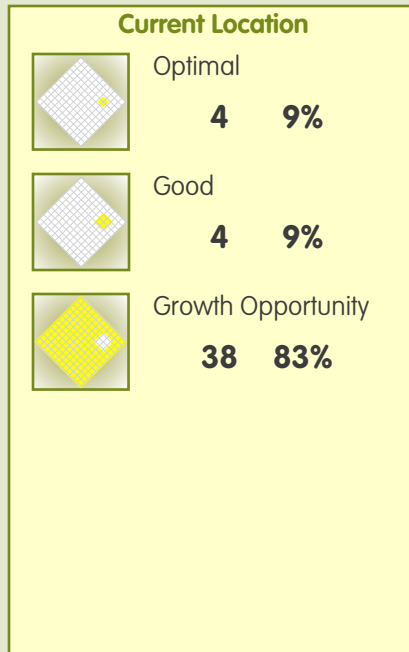
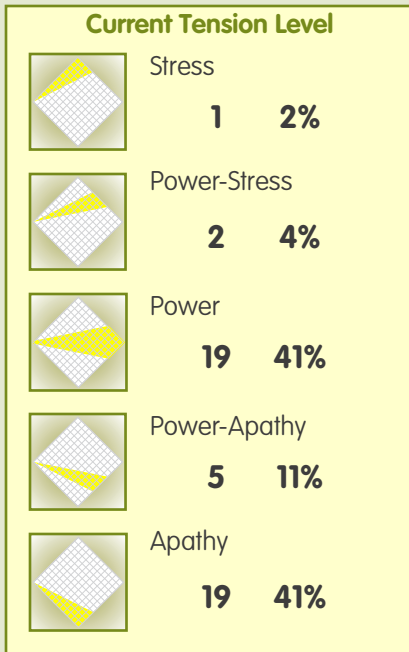
Perceived Challenge:

Average	5.24												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	3	3	7	7	2	2	4	3	2	6	7	0	0
Percentages									72%	13%	15%		

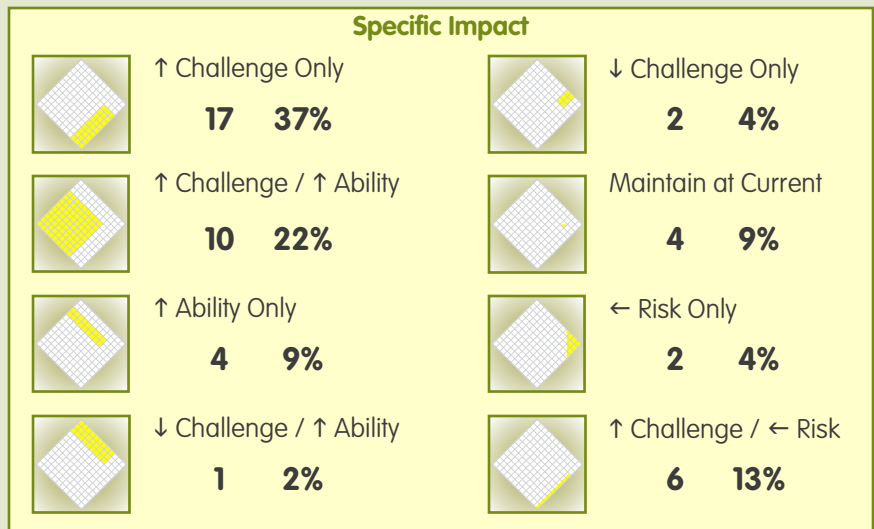
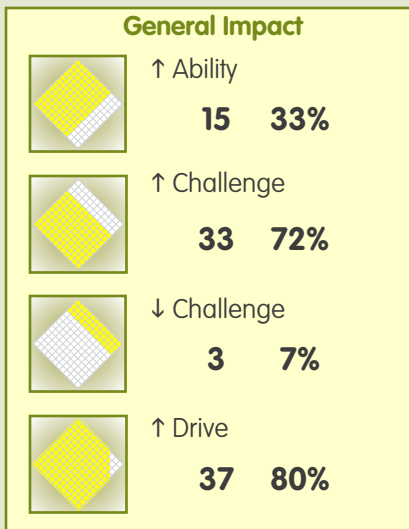
Perceived Importance:

Average	9.72												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	0	1	1	1	4	3	8	11	6	11
Percentages									22%	78%			

Analysis:



Action Planning:



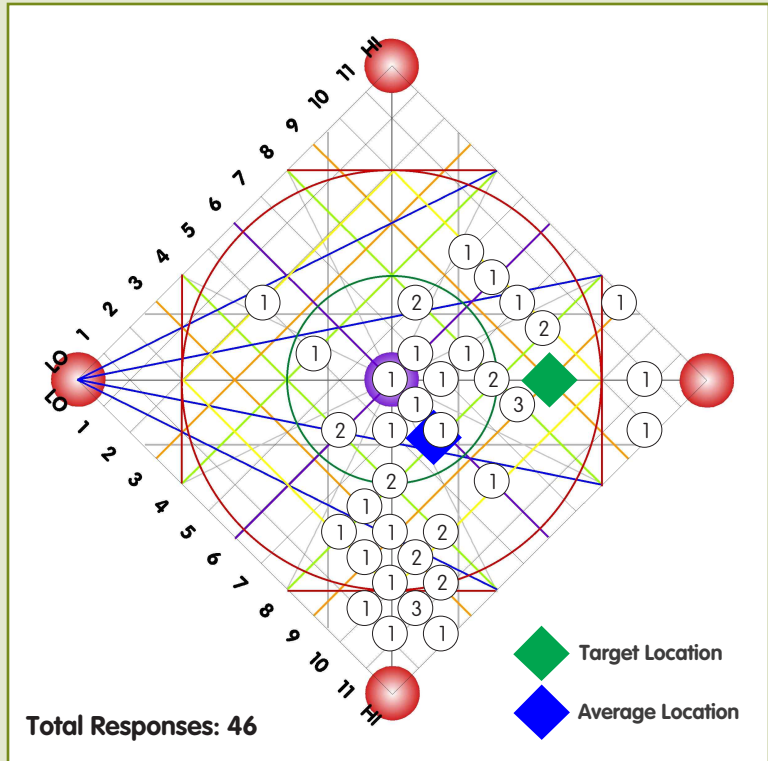
Commentary:

Activity #9:

“Preventing stagnant client relationships.”

Activity Description:

“Securing a new client is great, but the real goal is to see your client achieve all of the outcomes laid out at the beginning of the relationship. Often, clients grow stagnant long before the work is finished. It starts innocently enough ... they're late for appointments, they don't follow-through on assignments, they seem disconnected. Ultimately, the work ends and the relationship ends. Do your clients finish what they start? Do they keep up their end of the bargain? Do you find yourself intervening when things begin to grow stagnant or terminating relationships before the goals are met?”



Results:

Perceived Ability:

Average	8.33												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	1	0	1	3	5	5	9	6	7	7	2
Percentages									52%	13%	35%		

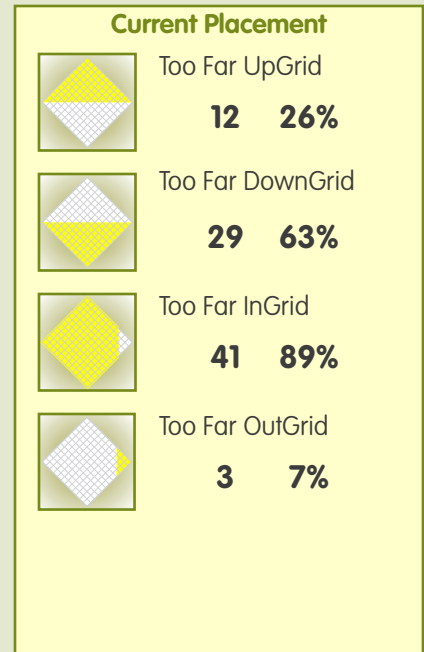
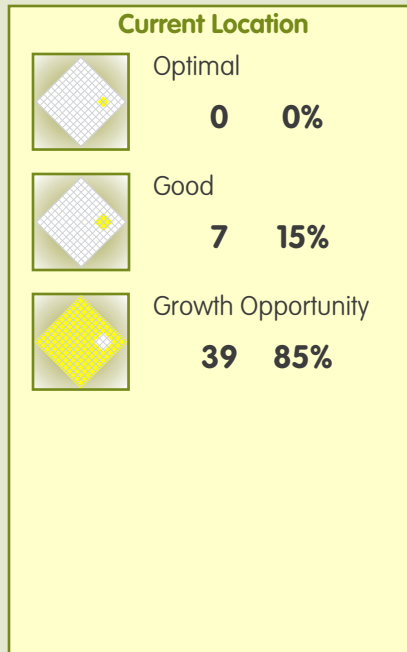
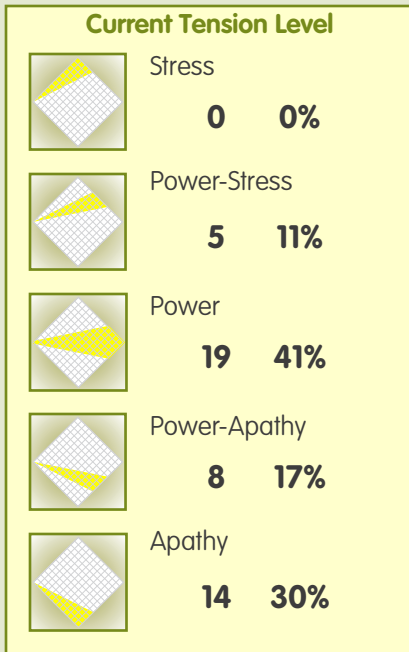
Perceived Challenge:

Average	5.61												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	2	7	6	6	3	4	2	8	0	6	1	1
Percentages									83%	0%	17%		

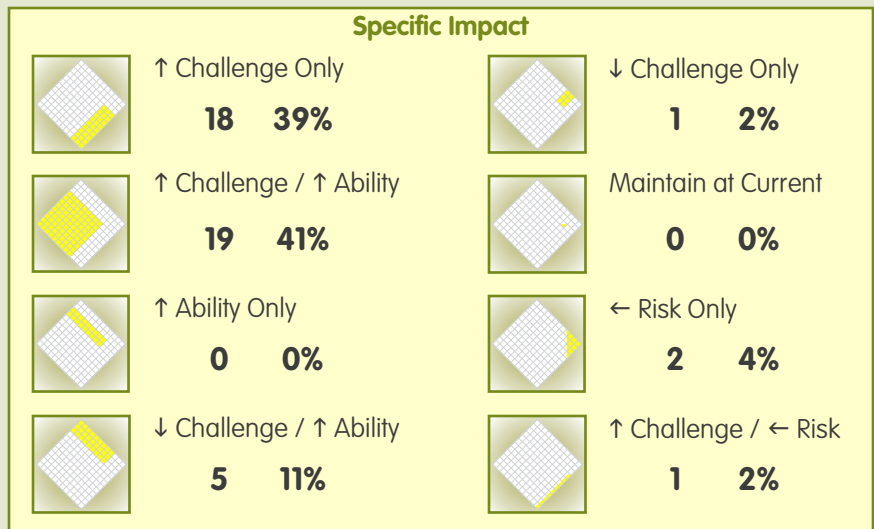
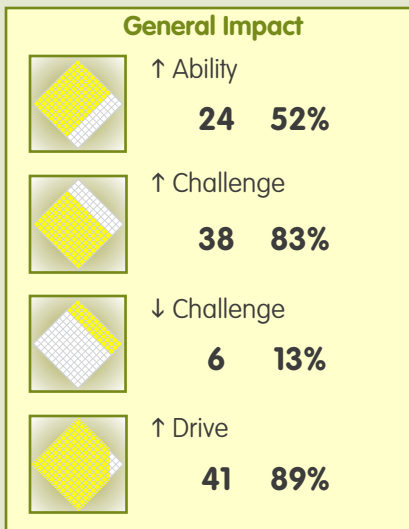
Perceived Importance:

Average	9.83												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	0	1	1	2	1	5	5	14	5	12
Percentages									22%	78%			

Analysis:



Action Planning:



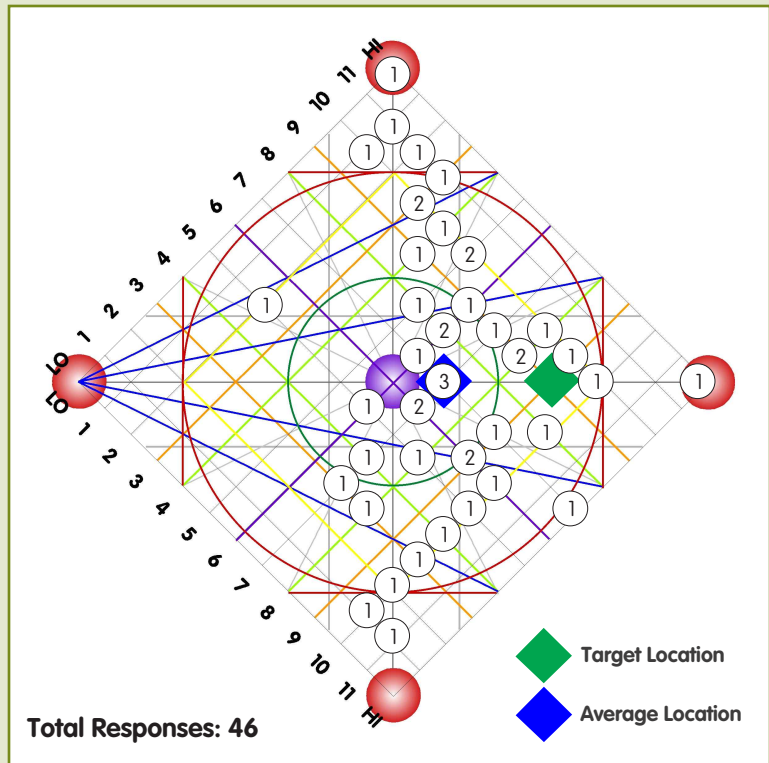
Commentary:

Activity #10:

“Capturing ongoing billable opportunities.”

Activity Description:

“Clients generally come to us with a single-issue focus, but that is just a piece of the entire puzzle. Once that presenting issue is addressed, other situations needing attention should rise to the surface, and you should be positioned to continue a mutually-beneficial ongoing relationship with that client. Do you seek out and secure additional opportunities?”



Results:

Perceived Ability:

Average	6.85												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	1	2	2	3	2	3	5	8	5	4	8	1	2
Percentages									67%	9%	24%		

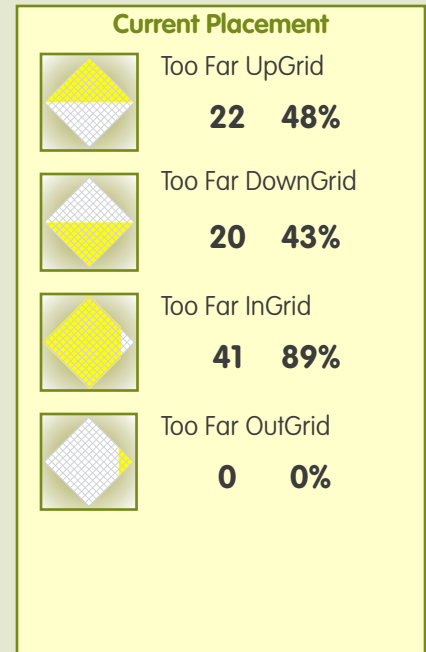
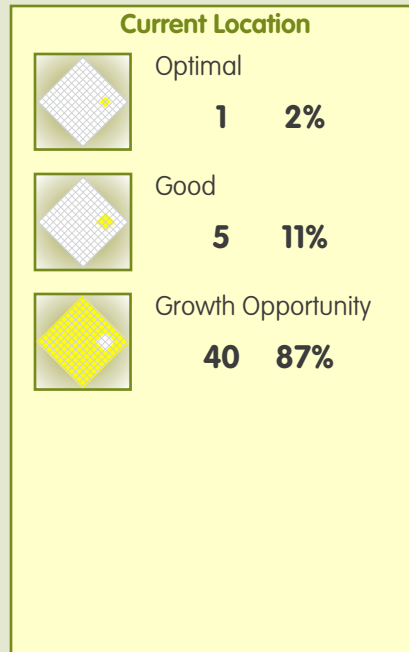
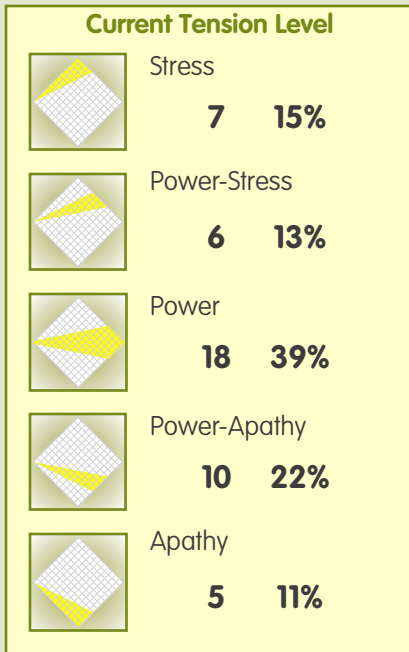
Perceived Challenge:

Average	5.65												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	1	2	1	3	2	4	5	6	4	5	9	3	1
Percentages									61%	11%	28%		

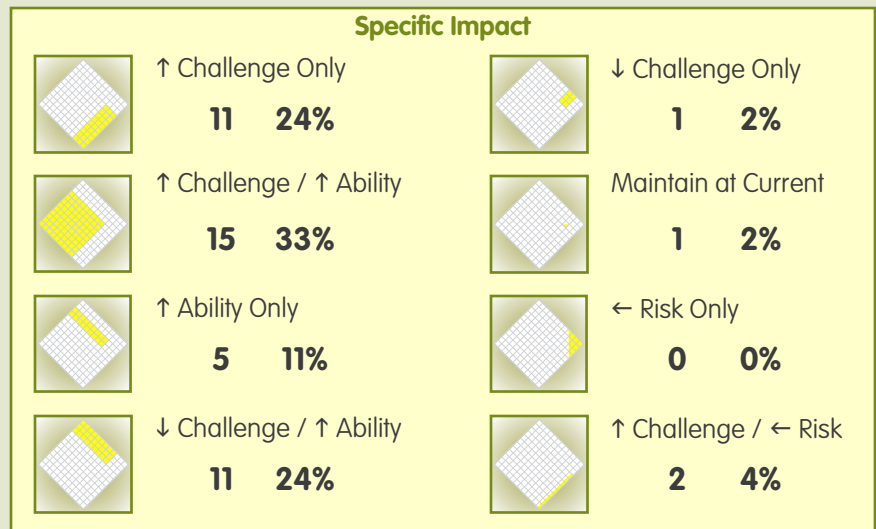
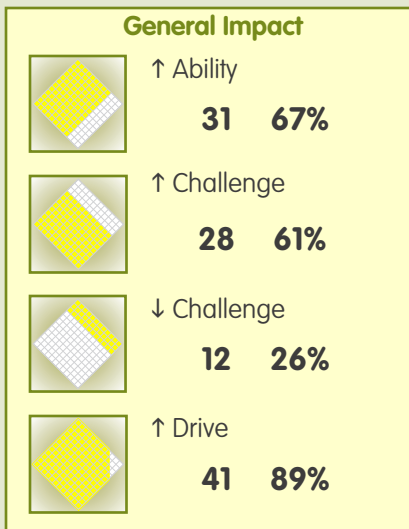
Perceived Importance:

Average	10.30												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	1	1	1	0	1	2	1	15	8	16
Percentages										13%	87%		

Analysis:



Action Planning:



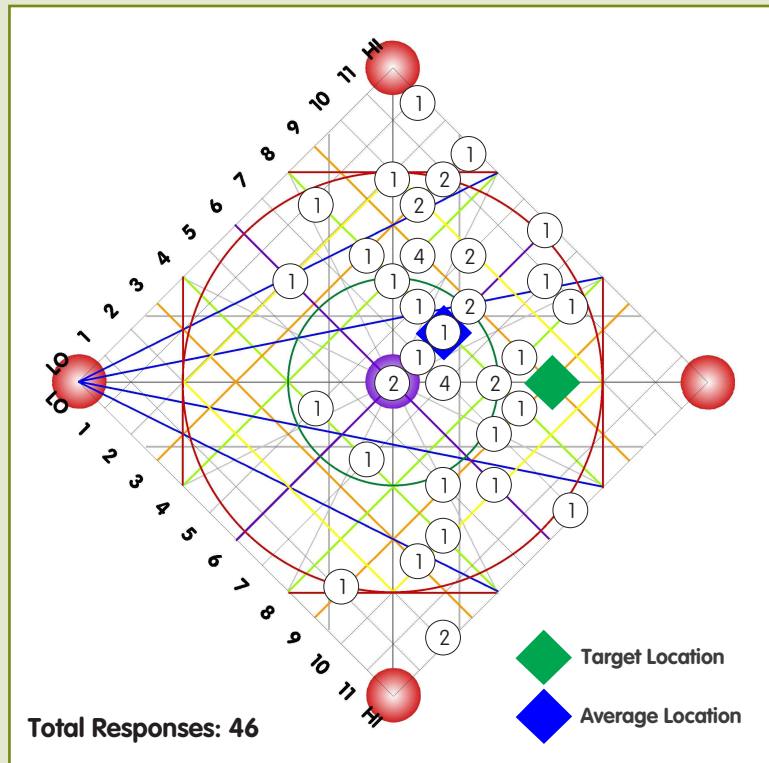
Commentary:

Activity #11:

“Keeping my calendar filled with billable services.”

Activity Description:

“Not all activity is income generating and, if you’re not careful, non-income-generating activities can easily infiltrate themselves into the majority of your business day. This activity is all about devoting your efforts to filling your calendar with billable client services.”



Results:

Perceived Ability:

Average	6.07												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	2	2	6	5	4	7	7	4	4	2	0	3
Percentages									80%	9%	11%		

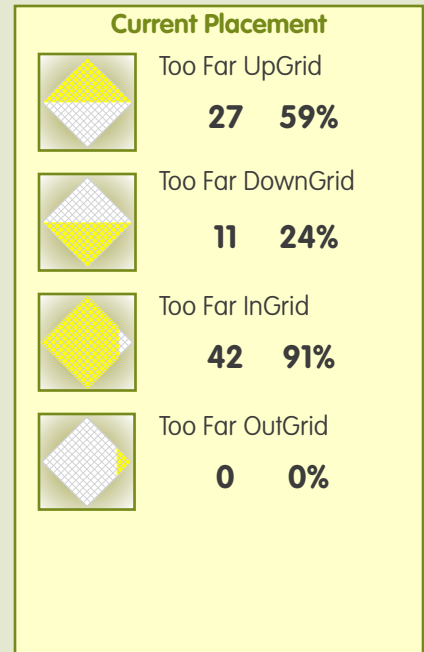
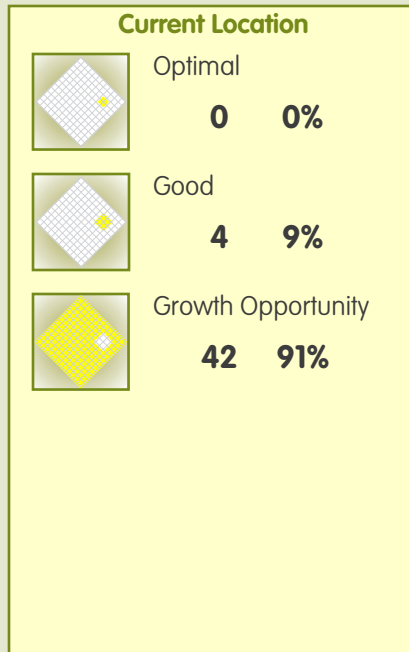
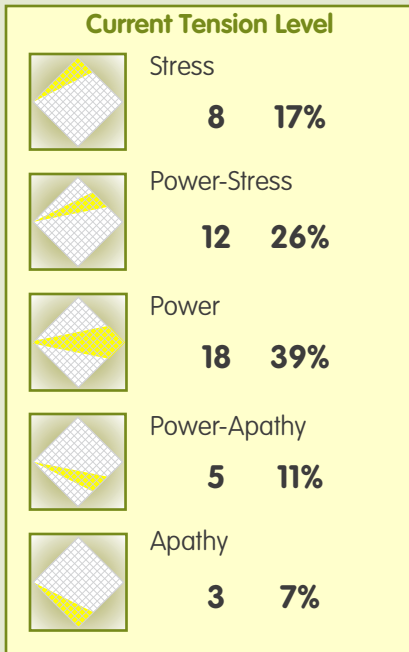
Perceived Challenge:

Average	7.87												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	1	2	0	3	1	4	7	8	7	6	4	3
Percentages									57%	15%	28%		

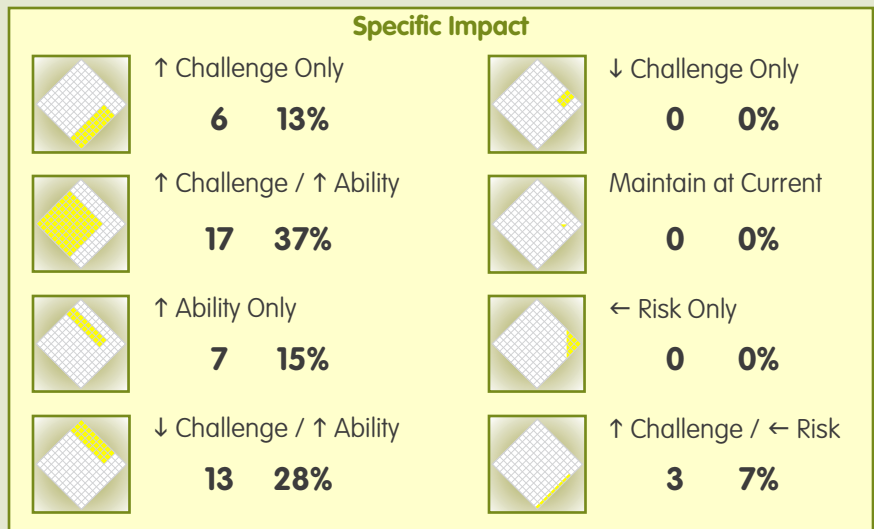
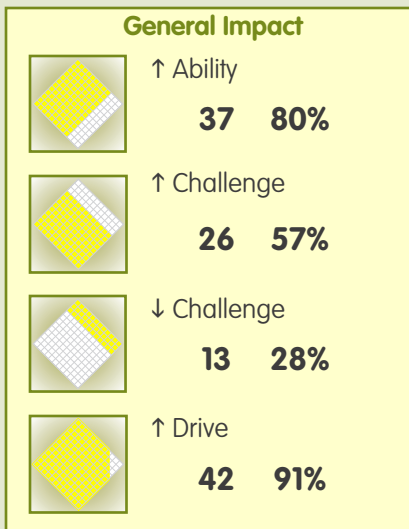
Perceived Importance:

Average	10.57												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	1	0	0	1	2	2	0	14	5	21
Percentages									13%	87%			

Analysis:



Action Planning:



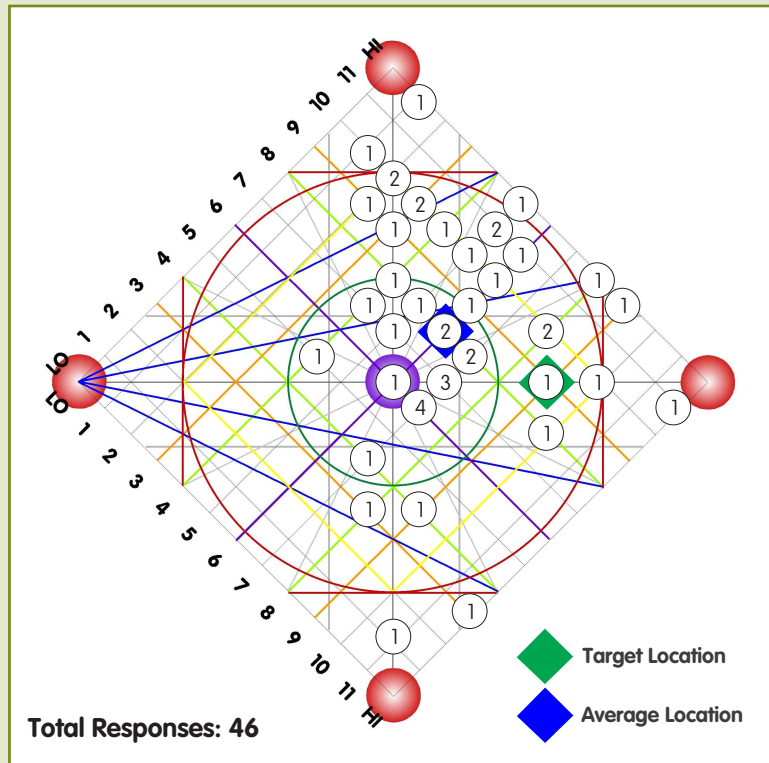
Commentary:

Activity #12:

“Building a fully leveraged business.”

Activity Description:

“Creating a client is one of the most challenging parts of building a human development practice, so the ultimate goal is to offer a rich and robust menu of programs, products and services to keep that client a CLIENT for as long as makes sense – and in as many ways as makes sense. Do you offer just a few ways in which prospects can benefit from your expertise, or have you leveraged your talents in numerous creative ways, such as books, tapes, speaking engagements, group coaching, websites, teleconferences, etc?”



Results:

Perceived Ability:

Average	6.15												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	2	3	3	4	6	6	10	4	3	2	1	2
Percentages									83%	7%	10%		

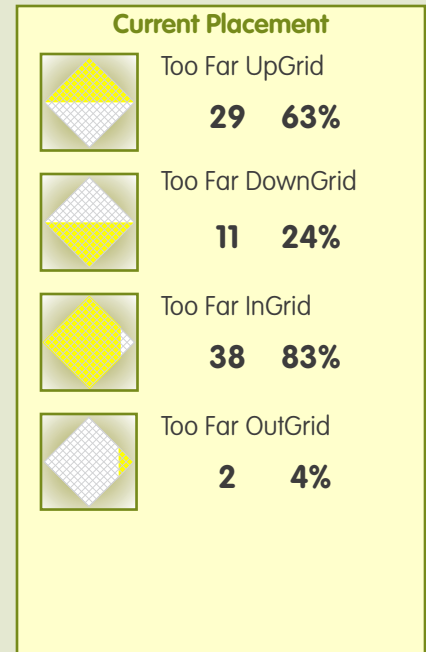
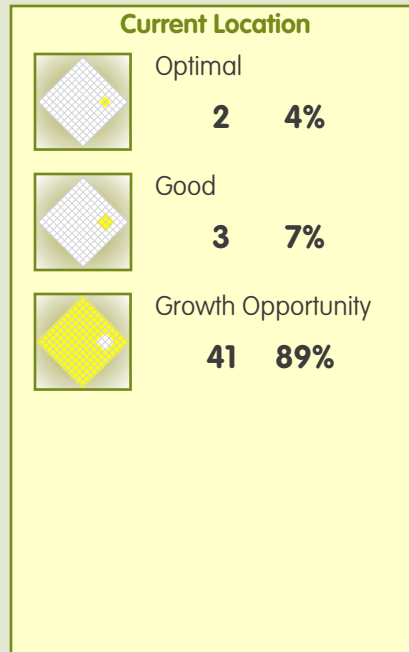
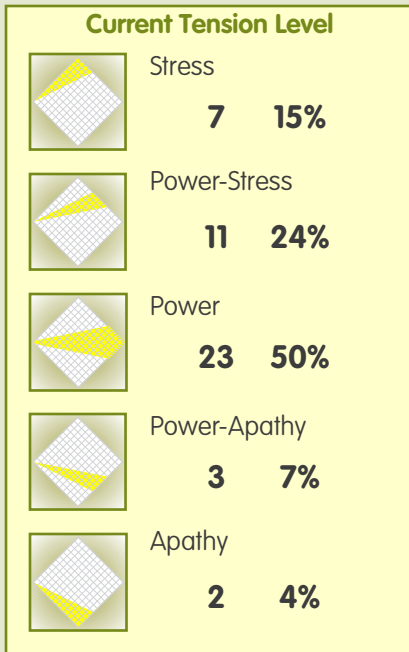
Perceived Challenge:

Average	8.24												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	1	0	2	2	1	5	5	7	4	11	4	4
Percentages									50%	9%	41%		

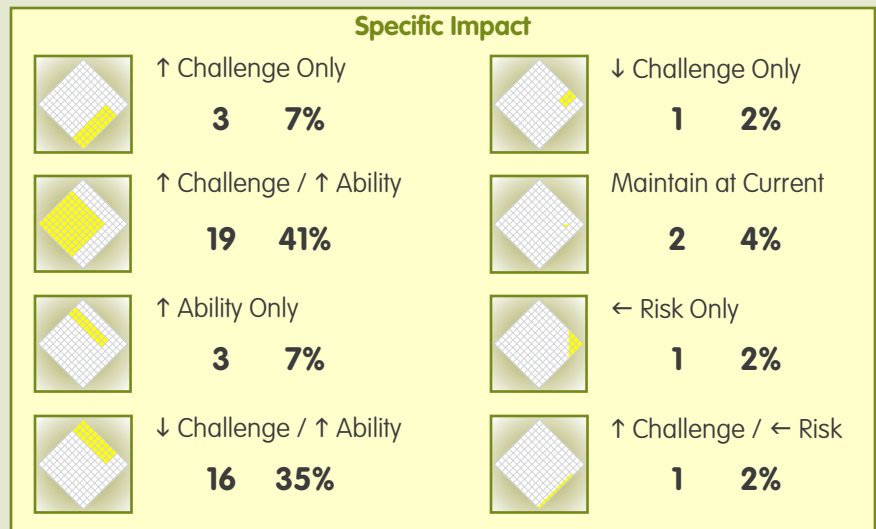
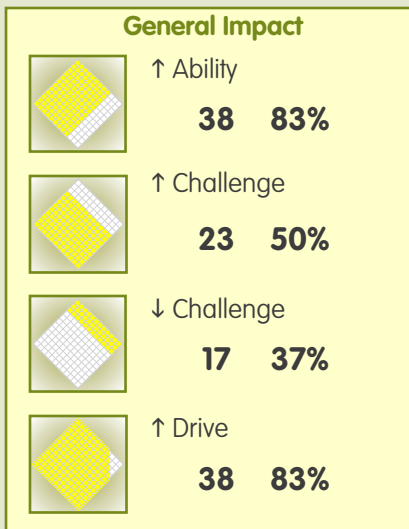
Perceived Importance:

Average	10.07												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	1	0	1	1	0	3	3	2	13	5	17
Percentages									20%	80%			

Analysis:



Action Planning:



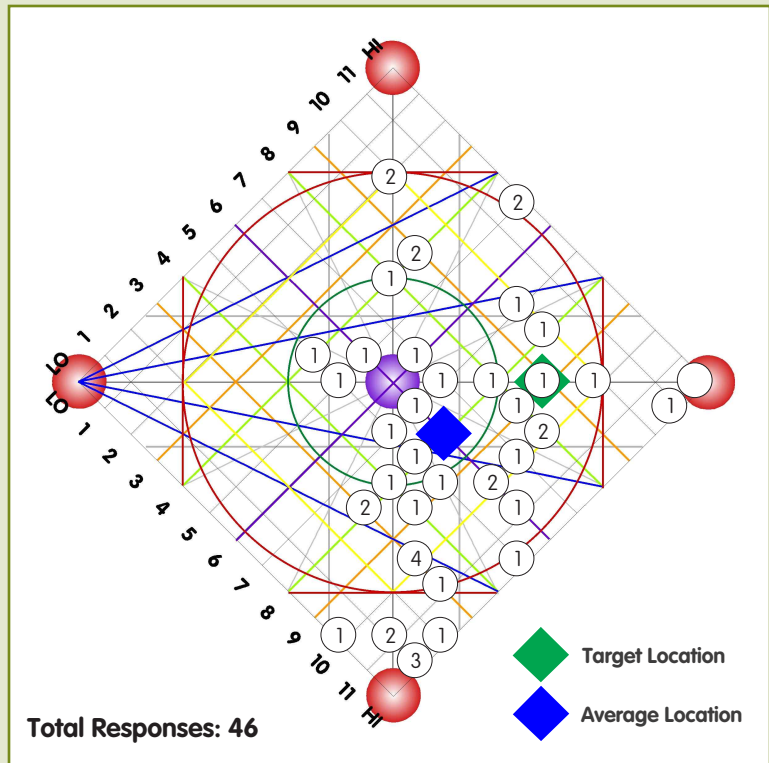
Commentary:

Activity #13:

“Sustaining discipline and accountability.”

Activity Description:

“Ultimately, your success truly is a matter of time. How you plan your time. How you manage your time. How you protect your time. Some human development professionals have no problem with keeping themselves focused and responsible for their work, but many struggle daily to eliminate distractions, create realistic work schedules, stay on track and accomplish their goals. How disciplined and accountable are you?”



Results:

Perceived Ability:

Average	8.35												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	2	0	4	4	1	4	6	4	11	4	6
Percentages									46%	9%	45%		

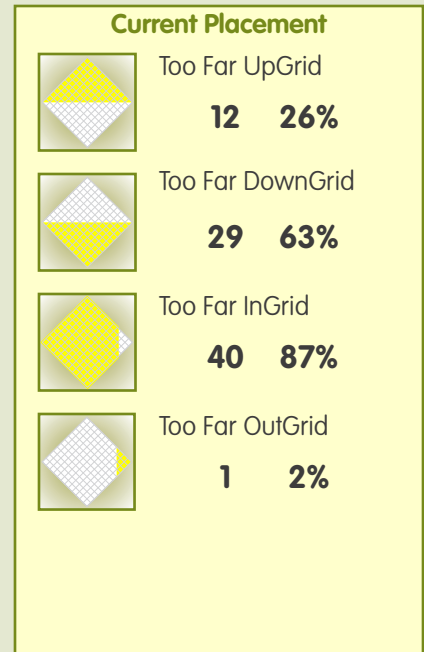
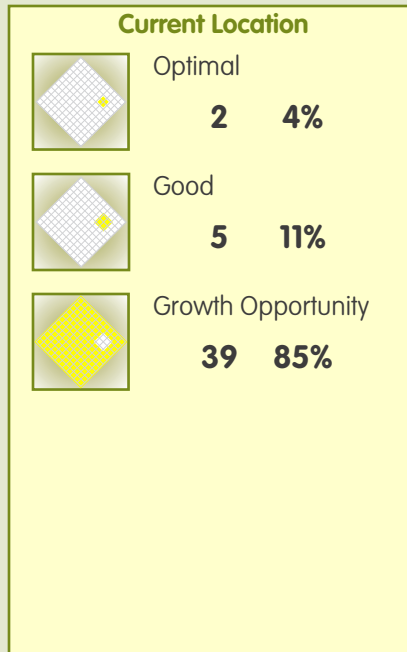
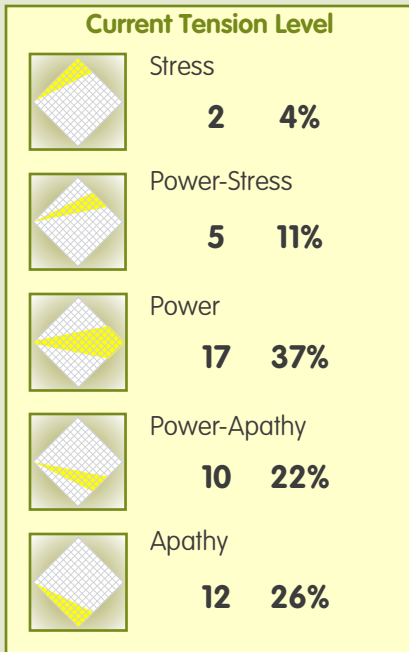
Perceived Challenge:

Average	5.85												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	1	5	1	7	2	6	5	3	5	3	5	1	2
Percentages									76%	7%	17%		

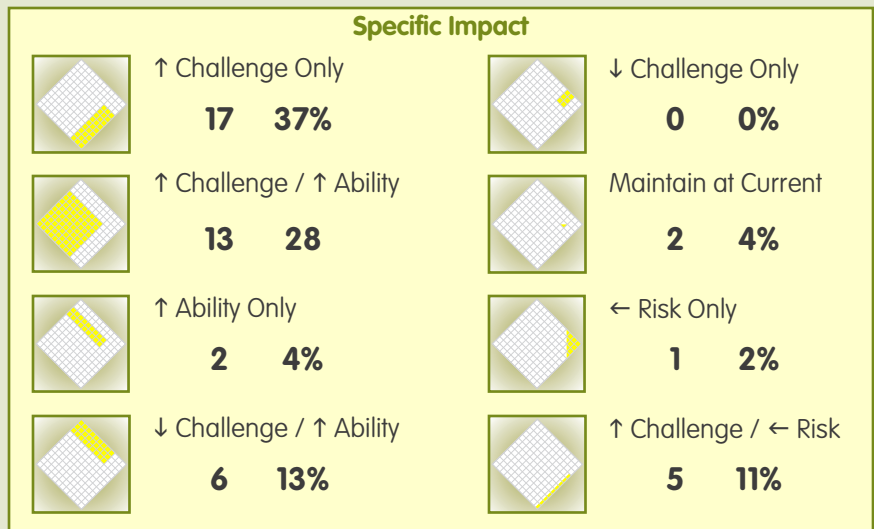
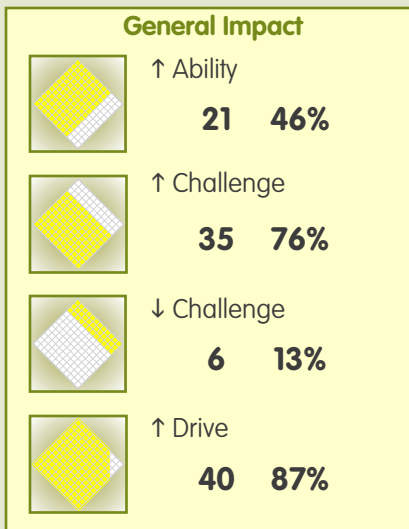
Perceived Importance:

Average	10.04												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	1	0	3	0	1	2	4	13	9	13
Percentages									15%	85%			

Analysis:



Action Planning:



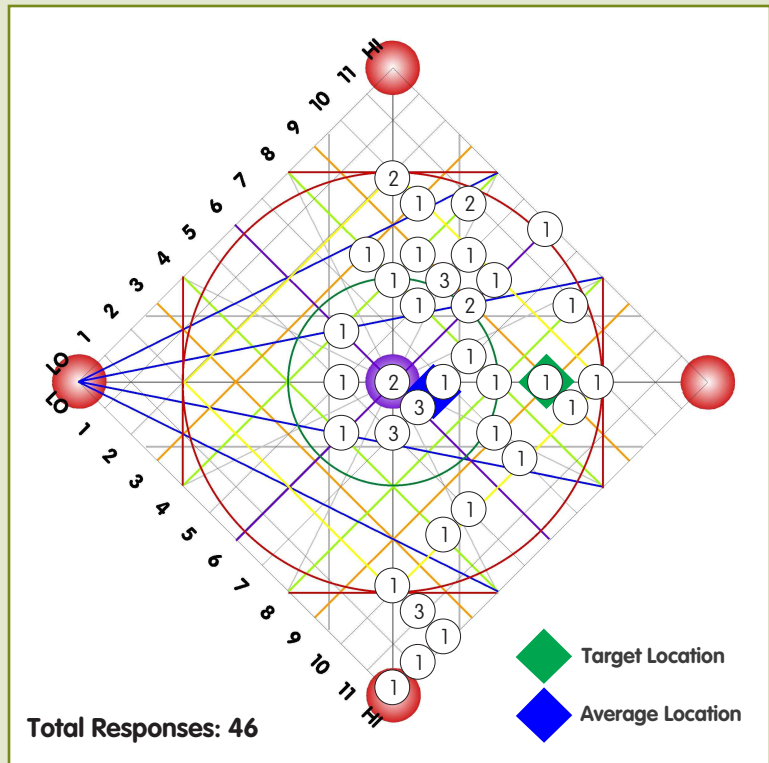
Commentary:

Activity #14:

“Leveraging existing relationships to get qualified referrals.”

Activity Description:

“While your marketing efforts should be the primary source of inquiries for your services, the relationships you’ve built with existing clients can often lead to additional work and therefore should not be neglected.”



Results:

Perceived Ability:

Average	6.93												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	2	2	5	6	7	9	2	2	4	4	3
Percentages									72%	4%	24%		

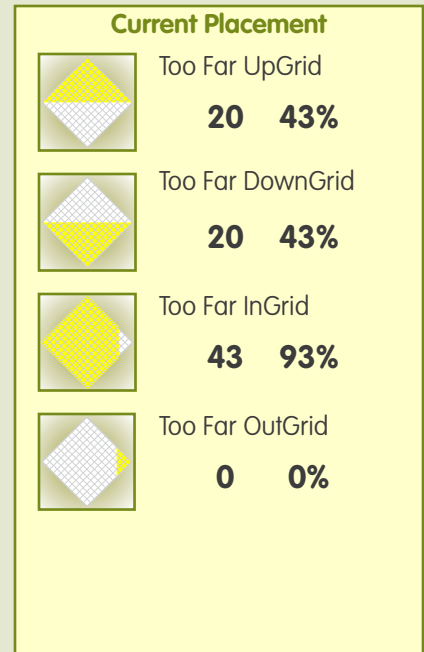
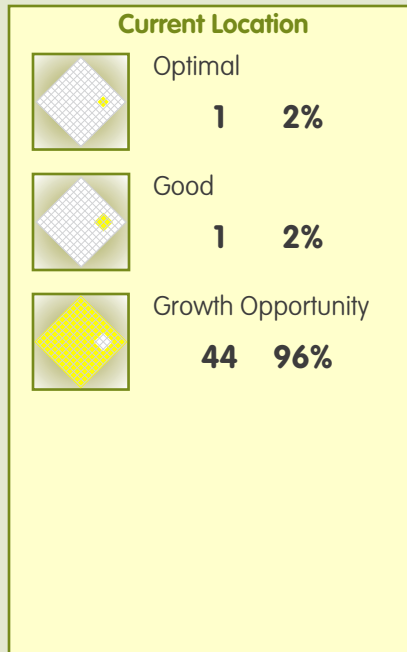
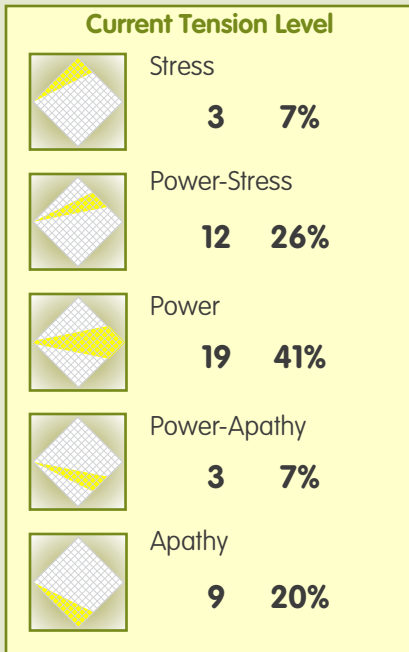
Perceived Challenge:

Average	6.59												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	1	2	5	1	2	5	6	3	5	7	5	3	1
Percentages									65%	15%	20%		

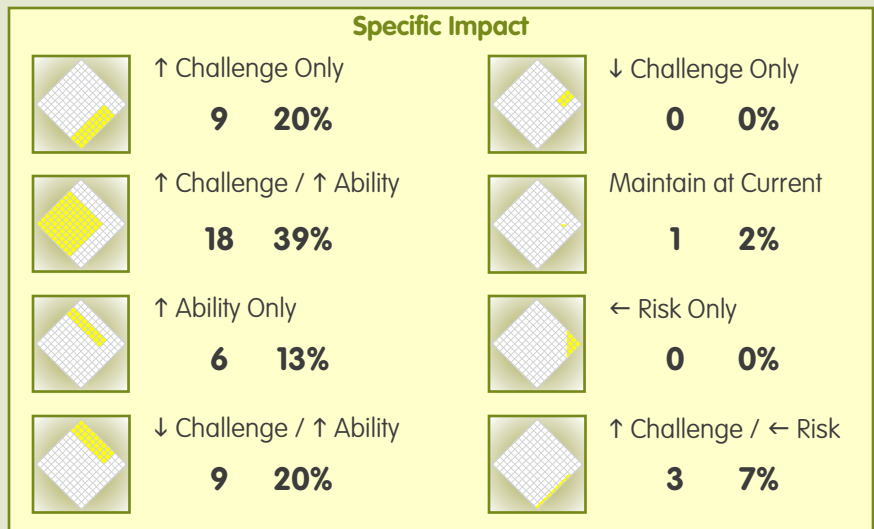
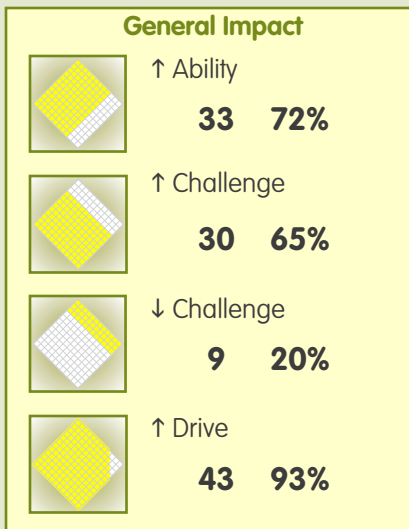
Perceived Importance:

Average	10.72												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	0	1	0	0	1	0	1	2	14	6	21
Percentages										7%	93%		

Analysis:



Action Planning:



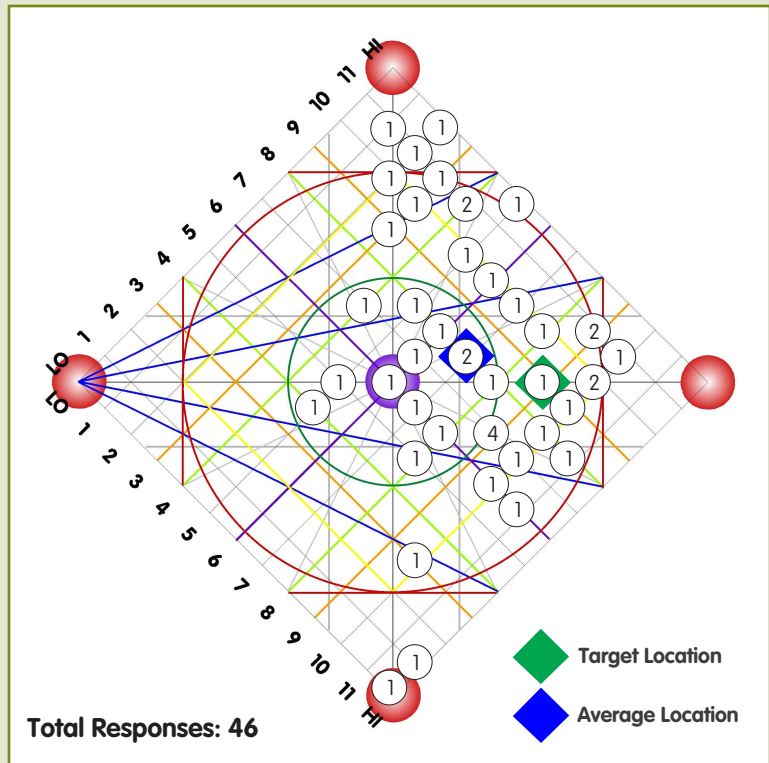
Commentary:

Activity #15:

“Getting paid what I’m really worth.”

Activity Description:

“At the end of the day, do you feel that you’ve been generously compensated for your efforts or do you feel underappreciated, undervalued and/or underpaid? Are you satisfied with the hourly rate you actually receive AND the total amount your earning in a given week or month?”



Results:

Perceived Ability:

Average	7.09												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	1	3	3	3	5	4	4	4	7	8	2	2
Percentages									59%	15%	26%		

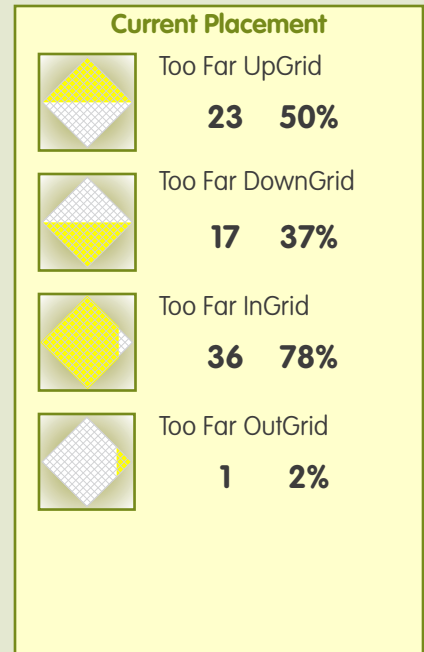
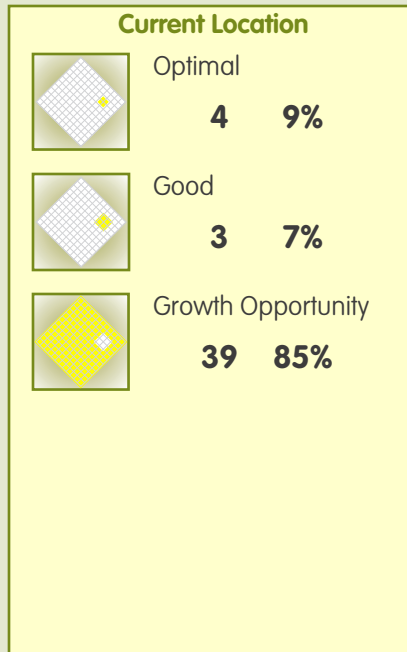
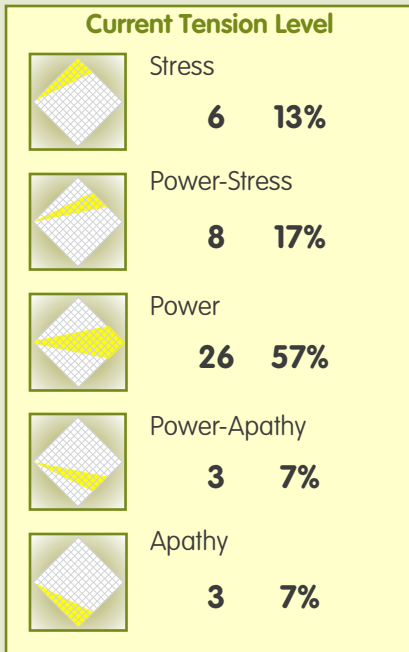
Perceived Challenge:

Average	8.09												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	1	1	0	1	1	2	5	7	7	3	8	8	2
Percentages									54%	7%	39%		

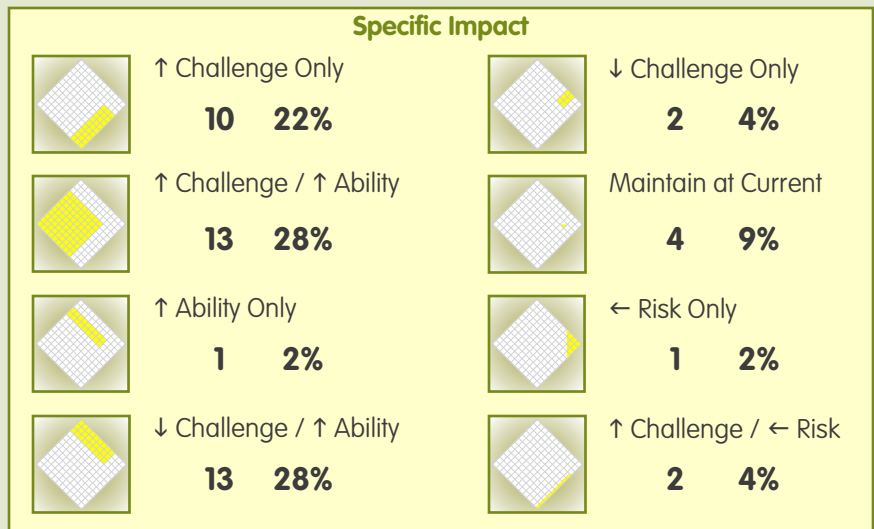
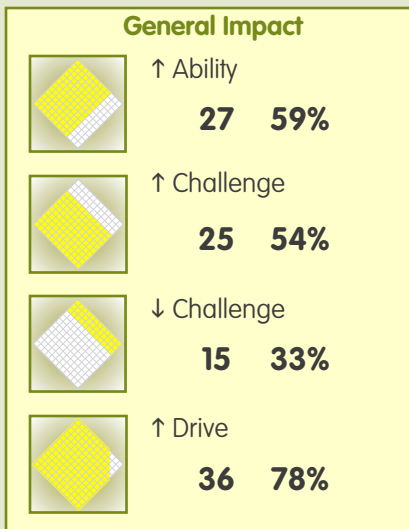
Perceived Importance:

Average	10.85												
Levels	0	1	2	3	4	5	6	7	8	9	10	11	12
Responses	0	0	1	0	0	0	1	1	3	0	5	10	25
Percentages									13%	87%			

Analysis:



Action Planning:



Commentary: