



ABOUT THE SITUATIONAL OUTLOOK QUESTIONNAIRE® (SOQ)



Situational Outlook QuestionnaireSM

**Interested in stimulating innovation, improving productivity
and sustaining change?**

When you need to make change stick or improve the ability of your organization or team to be more innovative, you may need to take a good look at the working environment.

Many people think and talk about “culture change.” Culture is an important part of the work environment, but it takes a long time to change a culture – even if that is possible or desirable. Culture is deeply rooted in an organization’s history and is relatively stable. We focus on changing behavior and language – things that can be changed. The organization’s climate refers to the recurring patterns of behavior exhibited in the day-to-day environment of the organization, as experienced, understood, and interpreted by the individuals within the organization. Organizational climate reflects the working atmosphere. It is people’s perceptions of these behaviors and interactions that influence their attitudes at work, as well as their levels of performance and resulting productivity.

Why consider climate?

- **Climate is a key capability for innovation and growth.** Research and practical experience show that those organizations that perform better on numerous innovation and growth metrics deliberately manage their working climate.
- **Climate is a key factor in helping organizations manage change.** The evidence is clear – those organizations and teams with healthier climates can handle more complex work designs, have more productive teams, and higher levels of flexibility. As a result, they also improve their bottom-line results, have shorter times to market, and higher levels of profitability.

- **Climate is a key factor promoting improved business performance.** Businesses that have leaders and managers who deliberately focus on creating a climate that engages its workforce have higher rates of profitability (increased revenue, stock price, and net income), productivity, and customer loyalty.
- **Climate is key to wellbeing in the workplace.** Healthier working climates have been linked to increased levels of job satisfaction, lower rates of employee turnover, decreased stress in the workplace, and increased feelings and attitudes of contentment and enthusiasm.

About the Situational Outlook Questionnaire®

The Situational Outlook Questionnaire® (SOQ) is a two-part questionnaire that measures people's perceptions of the climate for creativity, innovation, and change within their immediate work environment. The SOQ assesses nine dimensions using 53 questions and includes open-ended questions to provide more meaningful information on what is working, what is not, and what needs to be done to make the climate better. The SOQ is based on more than 50 years of research and development, and has shown its value in helping teams, leaders and organizations improve their ability to produce results.

The nine dimensions measured by the SOQ include:

- *Challenge and Involvement* – The degree to which people are involved in daily operations, long-term goals, and visions
- *Freedom* – The degree of independence shown by the people in the organization
- *Trust and Openness* – The emotional safety in relationships
- *Idea-Time* – The amount of time people can, and do, use for elaborating new ideas
- *Playfulness and Humor* – The spontaneity and ease displayed within the workplace
- *Conflict* – The presence of personal and emotional tensions (a negative dimension – in contrast to the debate dimension)
- *Idea-Support* – The ways new ideas are treated
- *Debate* – The occurrence of encounters and disagreement between viewpoints, ideas, experiences and knowledge
- *Risk-Taking* – The tolerance of uncertainty and ambiguity

The power behind SOQ is that the dimensions it measures have been validated against measures of organizational innovation. Research has examined the relationship between people's perception of the organizational climate and the organization's ability to: develop original products and services, expedite delivery of these products to the marketplace, and commercialize original and successful products.

Organizations were categorized as innovative, average, and stagnated based on their product performance and commercial success. Innovative organizations developed more new products and services and moved them to the marketplace quickly, and were commercially successful overall. Stagnated organizations were unable to control development of new products and services, had difficulty getting them to market in a timely and cost-effective manner, and were commercially in trouble. Average companies fell in the middle.

The scores below show the differences on the nine climate dimensions in each group. The scale ranges from 0-300 and as you can see in the table below: people in innovative companies perceive more of each dimension – except for Conflict since it is a negative dimension.

SOQ Climate Dimension	Innovative Organizations	Average Organizations	Stagnated Organizations
Challenge/Involvement	238	190	163
Freedom	210	174	153
Trust	178	160	128
Idea-Time	148	111	97
Playfulness/Humor	230	169	140
Conflict	78	88	140
Idea-Support	183	164	108
Debate	158	128	105
Risk-Taking	195	112	53

These results demonstrate how people in innovative organizations differ in their perceptions of the working climate from those in stagnated organizations.

The SOQ also includes answers to three key questions:

In order to provide you with a deeper understanding of the working environment, we have designed three open-ended questions so that participants can provide more specific detail about:

- What's most helpful and supportive to their creativity and innovation?
- What's hindering their creativity and innovation?

- What specific recommendations or concrete actions would improve the climate?

This way, results fit the specific situation and context and specific concrete actions can be taken. Clear targets for improvement can be established.

Administering the Situational Outlook Questionnaire™

Only those who are qualified by CPSB can administer, interpret and apply the SOQ. Participants complete the SOQ on-line. The SOQ can be completed in 20-25 minutes. The data is then processed to provide group results for presentation and interpretation. Depending on the focus of the SOQ intervention feedback is then prepared for:

Leadership Development – Individuals receive their personal results and those from selected observers

Team Effectiveness – Team members receive their group results so they can improve their team performance

Organizational Improvement – Leadership teams receive results so they can assess the readiness, willingness, and ability of the organization to implement and sustain change efforts

CPSB does offer qualification programs for those who wish to be able to administer and use the SOQ on their own.

If interested:

- In learning more about climate: Purchase our *Introduction to Climate* booklet by contacting CPSB (information below).
- In applying the SOQ in your organization and how SOQ Services work: Contact CPSB by emailing cpsb@cpsb.com or calling the number below.
- In becoming a Qualified SOQ Practitioner: Download the document "About Becoming a Qualified SOQ Practitioner" from www.soqonline.net under the "What is Climate" tab and then select "Learn More."

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