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COLLECTIVE INC.

## Sample **DEX**-SCORE 360 for Executive Team

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Prepared for: <Client ABC, Financial Services Corp. Executive Management Team>

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## WHAT IS THE DEX-SCORE 360 ASSESSMENT?

**The DEX-SCORE 360 Assessment is a diagnostic tool designed to reveal where day-to-day barriers are slowing performance, limiting digital adoption, and preventing employees from operating at their full potential. It measures how consistently people can use tools, navigate workflows, and collaborate across teams. It highlights where gaps in capability, clarity, or alignment are creating unseen strain in the organization.**

**By gathering insights from leaders, managers, and employees, the assessment uncovers hidden friction points that impact productivity, culture, and the return on technology investments.**

**The DEX-SCORE 360 Assessment provides a data-driven picture of how people experience work today and identifies the conditions needed to support a more digitally fluent, steady, and high-performing workforce.**

## CORNERSTONE PRINCIPLES

- 1. Friction is measurable—and fixable.**  
The assessment is grounded in the belief that operational and behavioral friction can be quantified, understood, and improved through intentional design and change support.
- 2. People experience work differently at different levels.**  
By comparing results from leaders, managers, and employees, the assessment surfaces the perception gaps that most often derail digital adoption, performance, and cultural alignment.
- 3. Technology only works when people can use it confidently.**  
Digital tools alone do not unlock value; digital fluency, clarity of expectations, and consistent workflows do.
- 4. Workflows shape behavior. Behavior shapes outcomes.**  
Operational Steadiness focuses on the systems and structures that enable people to work effectively—not just the tools they use.
- 5. Human capability is an organizational asset.**  
People Potential highlights the learning, support, and environmental conditions required for employees to grow skills, build confidence, and contribute at their best.
- 6. Mindset and Psychological Health & Safety play a key role in adoption.**  
Humans can't learn, adapt, or change when their nervous system is dysregulated. Digital adoption succeeds only when people feel safe, grounded, and ready.
- 7. Insights must be practical and actionable.**  
Results are translated into clear recommendations and a 3/6/12-month roadmap that helps organizations reduce friction and strengthen performance.
- 8. Improvement is a continuous cycle—not a one-time event.** The DEX-SCORE 360 encourages organizations to revisit and refine their operating environment regularly to sustain gains in fluency, steadiness, and potential.



Digital



Operational



People

**Digital Fluency** is more than knowing *how* to use software—it reflects a user’s ability to confidently, efficiently, and consistently navigate digital tools in a way that enhances their work, strengthens collaboration, and improves organizational performance. When users are digitally fluent, they can understand not just the *features* of a tool, but the *purpose*, *best use cases*, and the *behaviours* required to get the most value from it. They can adapt to new updates, troubleshoot minor issues independently, and apply the right digital capabilities to the right tasks without relying on workarounds. Digital fluency also means using tools in a consistent, standardized way across teams, which reduces duplication, errors, and friction.

**Operational Steadiness** reflects how reliably and consistently workflows across teams—ensuring that processes are clear, handoffs are smooth, expectations are understood, and people can complete tasks without delays or rework. When operational steadiness is strong, teams experience predictable workflows, aligned ways of working, and fewer bottlenecks, which creates the stability needed for higher performance and stronger digital adoption. When steadiness is low, employees encounter inconsistent processes, unclear roles, duplicated effort, and coordination challenges that quietly erode productivity and make it harder to realize the full benefits of new systems and tools.

**People Potential** reflects the extent to which employees have the capability, confidence, and conditions to apply their skills, grow in their roles, and contribute meaningfully to organizational performance. When People Potential is strong, employees feel psychologically safe, supported by their peers, and motivated to learn new ways of working. They have the time, structure, and tools needed to build capability and apply it consistently. People Potential goes beyond talent or motivation—it measures whether the environment enables people to fully use their strengths, develop new ones, and perform at their best as the organization evolves. High People Potential accelerates digital adoption, strengthens culture, and unlocks performance gains; low People Potential constrains growth, slows transformation, and increases friction across teams.

Domain	Sub-Domains
<p><b>Digital Fluency</b></p> <p><i>How well people use tools, data, AI, and digital workflows to perform their work. Digital fluency enables employees to work smarter, make better decisions, and fully participate in a modern, technology-enabled workplace.</i></p>	<p><b>1. Technology, Tools &amp; System Proficiency</b> How confidently people use the core digital tools, systems, and platforms required for their work including navigation, task execution, troubleshooting, and feature use.</p> <p><b>2. Data, AI &amp; Automation Readiness</b> How effectively individuals use data, dashboards, AI (e.g., Copilot), and workflow automation to make decisions, streamline tasks, and improve productivity.</p> <p><b>3. Digital Communication &amp; Collaboration</b> How consistently and effectively people use digital channels and shared workflows to communicate, coordinate, co-author, and work across teams.</p>
<p><b>Operational Steadiness</b></p> <p><i>The clarity, predictability, and consistency of how work gets done. Operational Steadiness measures the degree to which workflows are clear, consistent, and predictable across teams, enabling work to move smoothly without delays or rework.</i></p>	<p><b>1. Clarity</b> How clearly people understand their roles, responsibilities, priorities, and workflows. Clarity ensures that work is guided by shared expectations, reducing confusion, rework, and unnecessary decision-making friction.</p> <p><b>2. Consistency</b> How reliably teams follow established processes, routines, and standards. Consistency creates predictability, reduces errors, and helps work move smoothly without constant shifts, firefighting, or operational breakdowns.</p> <p><b>3. Coordination</b> How effectively teams share information, collaborate, and align across functions. Coordination minimizes bottlenecks, supports efficient handoffs, and ensures that work flows across teams without delays or misalignment.</p>
<p><b>People Potential</b></p> <p><i>Capacity for engagement, emotional intelligence, psychological health and safety, collaboration, trust, and adaptability—creating the conditions where people can thrive and perform at their best.</i></p>	<p><b>1. Mindset</b> Cognitive flexibility, openness to feedback, learning readiness, resilience, and the ability to navigate and adapt to change.</p> <p><b>2. Psychological Health &amp; Safety</b> The extent to which the organizational culture fosters an environment where people can ask questions, surface concerns, take risks, and contribute authentically without emotional, social, or physiological fear.</p> <p><b>3. Relational Intelligence (Trust &amp; Emotional Intelligence)</b> The quality of interpersonal relationships: empathy, communication, trust, self-regulation, conflict skills, and the emotional awareness needed for healthy collaboration.</p>

Your Results: <Client ABC, Financial Services Corp. – Executive Management Team>

## Executive Summary

The DEX-SCORE 360 Assessment indicates an institution with strong transformational intent but uneven operational execution. Your overall friction score of **3.2/5** reflects a motivated workforce, one that shows high peer support, strong learning appetite, and clear willingness to adopt new tools yet remains slowed by foundational inconsistencies across daily operations. This tension is especially critical in a financial services environment where regulatory change, customer expectations, and digitization demand **clarity, coordination, and reliability** at all levels.

### Key Findings

#### 1. Significant confusion around Copilot and AI functionality

- Employees are unsure how Copilot and other AI tools work, how they should be used in daily workflows, and how they contribute to productivity.
- Despite this, **75%** report using AI tools like ChatGPT outside of sanctioned systems, signalling both strong interest in AI in spite of the a lack of organizational guidance.

**Implication:** High AI curiosity, low AI clarity — a risk for inconsistent practices, data exposure, security breach, and missed efficiency gains.

#### 2. Inconsistent workflows and unclear digital expectations

Employees report:

- inconsistent processes
- unclear expectations around new digital behaviours
- coordination gaps between business units

**Implication:** These issues lead to duplicated effort, unnecessary delays, and varying service levels across teams.

#### Strategic impact:

- Limits ROI on modernization investments
- Slows response time to regulatory and customer needs
- Increases risk through errors, rework, and inconsistent execution

These are operational problems with meaningful strategic consequences.

### **3. A notable perception gap between leadership and staff**

Senior leaders generally believe the operating environment is more aligned and predictable than employees experience daily. Meanwhile, managers and front-line teams report much higher friction, especially in areas like:

- branch operations
- underwriting
- claims and lending workflows
- compliance processes
- digital product delivery

**Implication:** Hidden friction accumulates at the front line, increasing risk and eroding efficiency without leadership visibility.

#### **Opportunity for Executive Action**

With clearer insight into where friction accumulates, the Executive Management Team has an opportunity to materially strengthen both operational performance, the employee experience and the people they serve.

Key improvements include:

- standardizing workflows
- clarifying digital expectations
- strengthening cross-functional coordination
- building confidence and capability with digital tools especially Microsoft 365 Applications and Copilot

By addressing these foundational gaps, Talent By Design Collective can help your organization accelerate productivity, improve client responsiveness, strengthen regulatory readiness, and fully leverage your modernization investments all while improving employee well-being and engagement.

# Overall Organizational Health Score: 3.2/5

## Scores & Gap Analysis

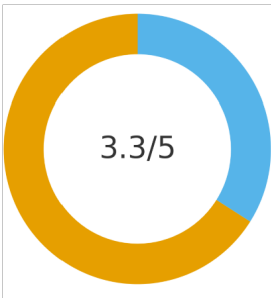
### Overall Scores by Role Friction Index Chart

Dimension	Leaders	Managers	Employees	Average
Digital Fluency	3.9	3.4	3.1	3.3
Operational Steadiness	3.6	3.0	2.7	3.0
People Potential	4.0	3.5	3.2	3.6



### Gap Analysis Summary

The assessment reveals a clear perception gap across the organization, with senior leaders consistently rating all dimensions more positively than managers and employees. The largest disconnect appears in **Operational Steadiness**, where leaders see stronger alignment than those experiencing the workflows day to day. Employees report the highest levels of friction overall, indicating that many barriers, such as inconsistent processes, unclear expectations, and coordination challenges, are more visible at the front line than at the senior level. Closing these gaps will require improving visibility, strengthening feedback channels, and aligning leadership assumptions with operational realities.



**Digital Fluency**

The assessment results indicate that Digital Fluency is emerging across the organization, reflected in a moderate score of **3.3/5**.

Employees understand the purpose of key tools and show strong willingness to learn, supported by healthy peer collaboration. However, daily work still depends heavily on workarounds, and many employees lack confidence using advanced features. Expectations for tool usage also vary across teams, creating inconsistency in how digital capabilities are applied. Overall, the foundations for strong Digital Fluency exist, but greater clarity, consistency, and hands-on capability building will be needed to elevate maturity across all levels.

**Strengths:**

- Clear understanding of purpose of tools at a high-level
- Willingness to learn new features
- Strong peer collaboration support

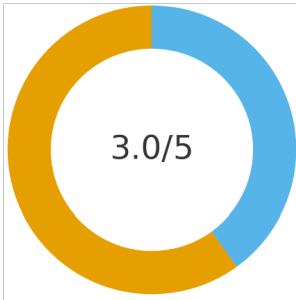
**Friction Indicators:**

- Heavy reliance on workarounds
- Limited comfort with advanced tool use
- Inconsistent expectations across teams

**Digital Fluency Heatmap**

Group	Rating
Leaders	Green
Managers	Amber
Employees	Amber/Red

**Interpretation:** Digital Fluency is emerging, but confidence and consistency vary widely across levels.



### Operational Steadiness

Operational Steadiness scored **3.0/5**, indicating that while teams show a strong intent to collaborate and some workflows are documented, execution remains inconsistent across the organization.

Employees report high variation in how processes are carried out, leading to frequent rework, duplicated effort, and unclear handoffs between teams. These inconsistencies create delays and make it difficult to maintain predictable performance. Strengthening workflow clarity, accountability, and cross-team coordination will be essential to improving overall steadiness and reducing daily friction.

#### Strengths:

- Strong intent to collaborate
- Some documented workflows exist

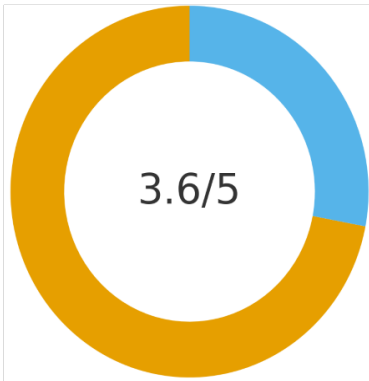
#### Friction Indicators:

- High variation in workflow execution
- Frequent rework and duplicated effort
- Roles and handoffs are unclear
- Delays between teams

#### Operational Steadiness Heatmap

Group	Rating
Leaders	Amber
Managers	Red
Employees	Red

**Interpretation:** Operational Steadiness has the **widest perception gap** and represents the highest risk.



### People Potential

People Potential scored 3.6/5, indicating a strong foundation of motivation, safety, and peer support across the organization.

Employees clearly demonstrate a genuine appetite for growth and a willingness to help one another succeed—an important cultural asset for any transformation. However, this potential is not fully unlocked due to limited dedicated time for learning, skill-building that is not consistently integrated into daily workflows, and new bottlenecks—such as added security constraints—that are creating frustration for high performers. Strengthening the conditions that enable continuous learning and removing avoidable barriers will better position teams to fully leverage their capability and drive stronger performance outcomes.

#### Strengths:

- Strong appetite for growth
- High levels of psychological safety
- Employees support one another

#### Friction Indicators:

- Limited time for learning and not made mandatory
- Skill-building not consistently supported by workflow
- High performers frustrated by added bottlenecks such as security rules that were not present in old system

#### People Potential Heatmap

Group	Rating
Leaders	Green
Managers	Amber
Employees	Amber

**Interpretation:** People Potential is a relative strength, but dependent on reducing workflow friction.

## Strategic Recommendations



### Digital Fluency

#### **1. Develop micro-learning modules targeting advanced tool features**

Short, focused learning modules will help employees build confidence with the specific features that matter most for productivity—such as automation, collaboration, and reporting capabilities. Micro-learning lowers the barrier to adoption by meeting employees where they are, supporting incremental but consistent capability growth. These modules also form the foundation for a repeatable, scalable learning ecosystem aligned to future system upgrades.

#### **2. Provide role-specific capability pathways**

Not all roles require the same level of digital proficiency. By defining clear, role-based learning pathways, the organization can ensure that each employee develops the level of digital fluency needed for their responsibilities. This creates clarity, reduces variability in tool usage, and promotes equitable access to development opportunities across the workforce.

#### **3. Deliver practical AI-readiness training focused on Copilot and Microsoft 365 applications**

Providing hands-on, scenario-based training will help employees understand how to use AI tools such as Microsoft Copilot within the applications they rely on every day. This includes understanding how to use prompts for day-to-day communications, analyzing data, improving documentation quality, generating insights, and streamlining collaboration in tools like Outlook, Teams, Word, Excel, and PowerPoint. By showing employees *how AI enhances the quality, speed, and consistency of their work*, the organization can accelerate adoption, reduce digital friction, and build a future-ready workforce confident in using AI to improve communication, collaboration, and decision-making. This also limits security risks and privacy breaches of employees using other more familiar AI apps that are not sanctioned by company.



## Operational Steadiness

### **1. Redesign top-priority workflows end-to-end**

Operational friction often stems from outdated or inconsistent workflows. Redesigning high-impact workflows—starting with areas most critical to service delivery—will reduce rework, eliminate duplication, and clarify handoffs. This approach creates a more reliable operating environment and increases the return on technology investments by ensuring tools support optimized processes.

### **2. Define clear collaboration agreements across teams**

Collaboration agreements explicitly articulate how teams work together, exchange information, and make decisions. Establishing these agreements helps reduce ambiguity, prevent delays, and improve accountability. They serve as a foundational element of steadiness by ensuring that cross-functional coordination is predictable and consistent.

### **3. Introduce standardized operating rhythms (weekly/monthly)**

Consistent operating rhythms—such as structured check-ins, performance huddles, and monthly workflow reviews—create alignment and reduce drift. Standardizing these touchpoints supports proactive issue resolution, improves communication, and helps leaders sustain progress as workflows evolve. Operating rhythms also reinforce expectations for tool usage and collaboration.



## People Potential

### 1. Build manager coaching capability

Managers play a pivotal role in driving adoption, clarifying expectations, and supporting skill development. Strengthening coaching capability ensures that managers can effectively guide teams through change, reinforce new behaviors, and help employees navigate workflow challenges. Coaching also increases engagement and psychological safety, which are essential for unlocking people potential.

### 2. Create skill-development time blocks aligned to workflows

Employees need protected and purposeful time to learn. Introducing dedicated learning blocks—intentionally aligned with workflow cycles—helps people upskill without overwhelming operational demands. This signal from leadership demonstrates that skill development is valued, expected, and integrated into the way work gets done.

### 3. Launch a continuous improvement channel

A simple, accessible feedback mechanism enables employees to report friction, suggest enhancements, and participate in shaping more effective processes. This channel promotes a culture of continuous improvement, accelerates issue resolution, and ensures leadership maintains visibility into emerging operational challenges.

### 4. Establish Communities of Practice (CoPs) as a strategic mechanism for building and sustaining organizational capability.

CoPs actively engage practitioners who do the work every day, valuing their expertise and placing them at the center of the learning process. Because members learn together in the context of real challenges, their insights translate directly into improved practice, stronger collaboration, and more consistent ways of working. Communities of Practice empower employees to influence change, deepen their skills, and contribute to continuous improvement. As a result, they become a powerful social learning system—one that simultaneously accelerates professional development and strengthens the organization's core capabilities over time.

## 3/6/12 - Month Roadmap

### **0–3 Months: Quick Wins (Stabilize & Clarify)**

Focus on identifying and addressing the most immediate sources of friction.

These early interventions build trust, demonstrate progress, and create space for longer-term improvements.

- Address and remove the highest-impact workflow bottlenecks
- Launch micro-learning modules focused on foundational and high-use features
- Clarify expectations around tool usage and ways of working
- Activate early communication and engagement with leaders and managers
- Begin collecting feedback from teams on top friction points
- Develop learning modules and workshops for Copilot

Outcome: Greater clarity, reduced frustration, and stronger organizational readiness for deeper workflow redesign.

### **3–6 Months: Building Steadiness (Redesign & Align)**

Shift from stabilization to redesign. This phase aligns people, processes, and technology to improve consistency and predictability.

- Redesign priority workflows end-to-end
- Train managers in coaching fundamentals
- Formalize collaboration agreements across teams
- Begin consolidating duplicated processes or tools
- Expand micro-learning into intermediate skill development

Outcome: More consistent workflows, better coordination, and improved manager capability to support change.

## 12+ Months: Sustainable Transformation (Embed & Optimize)

Embed changes in culture, systems, and processes to ensure long-term success.

- Launch talent pathways that integrate digital skills into career development
- Establish ongoing continuous improvement cycles
- Conduct an annual DEX-SCORE 360 Assessment to measure progress
- Reinforce operating rhythms as a core part of organizational culture
- Scale Champions network and advanced training programs
- Evaluate ROI of digital tools to inform future investments
- Establish CoP and handover Organizational Improvement Plan

Outcome: A more digitally fluent, steady, and high-performing organization where employees can operate at their full potential.

### Priority Ranking Grid

	High Impact	Low Impact
Low Effort	Opportunity Area 1	Opportunity Area 2
High Effort	Opportunity Area 3	Opportunity Area 4

Would you like to continue the discussion based on your results and the recommendations above and complete the **Priority Ranking Grid** together?

Get into touch to schedule an in-person or a virtual meeting at your convenience.

Thank you for participating in our pilot program!