



# CULTURE DRIVEN GROWTH SELF-ASSESSMENT TOOL FOR FORWARD- THINKING ORGANIZATIONS

## FACILITATOR MANUAL



# ELEVATE

## FACILITATOR'S ROLE

So you will be facilitating the self assessment process in your organization. Great! Let us guide you through the process.

You are the person who steers the organisation through the self-assessment process. Your task is to create an atmosphere where people know what to do and feel safe to speak honestly, to collect the data in a structured way and to help the group transform the findings into concrete next steps.

Think of yourself as both a host – creating the right conditions for dialogue – and a guide who keeps the process moving.

### Phase 1. Preparing the assessment

- **The tool:** familiarize yourself with the tool and user manual. Read through all the categories (Purpose, Process, Practices) and the three stages (Recognize, Connect, Leverage), as well as the guiding questions, so that you can resolve participants' doubts confidently.
- **The scope:** define the scope of the analysis. There are three categories available (Purpose, Process, Practices). While a complete analysis supports a holistic reflection, some organisations may choose to start with selected parts to make the process more manageable.
- **Participants:** the selection of participants depends on the categories displayed for analysis (see the table on the next page). Remember it can be one person per department/role but it can be as well joint effort of a whole team or few people representing the same department/role. In such a case, make one person responsible for filling in the responses and sending them back to you on time.
- **Communication:** explain the purpose clearly. When inviting people, emphasise that this is not an audit or a test. It is a learning exercise that invites to have an internal conversation and it is designed to reveal strengths and gaps and to build a shared understanding of how the organisation can grow.

## FACILITATOR'S ROLE

The suggested distribution of roles is indicative. Please adapt it to your organisation's structure and role division. In smaller organisations, where roles often overlap, groups may be formed differently to ensure meaningful participation.

Part of the Tool	Typical Roles or Functions to Invite	Why Their Input Is Important
1. Purpose – Values, Vision & Strategic Objectives	CEO, Managing Director, Board Members, Strategy or Business Development Leaders, HR Director, Business Unit directors	They shape the organisation's vision and strategic priorities and can assess how clearly diversity is embedded in mission and strategy.
2. Purpose – Leadership	C-level leaders, Senior Managers, Department Heads, Diversity & Inclusion leaders	They set governance structures, model inclusive behaviour and are responsible for making diversity part of leadership practice.
3. Process – Human Resource Management	HR Director, Talent Acquisition/Recruitment Managers, Learning & Development Specialists, Line Managers involved in hiring and promotions	They oversee recruitment, onboarding, career development and intercultural learning—core processes that determine how diversity is cultivated.
4. Process – Communication	Internal Communication Managers, Corporate Communications or PR Specialists	They design internal and external communication channels and ensure messages are inclusive and culturally sensitive.
5. Process – Marketing & Customer Service	Marketing/Brand/ Category Managers, Customer Experience or Service Managers, Product/Service Design Leads	They work directly with diverse customers and adapt products and services to different cultural groups.
6. Process – Innovation Management / R&D	R&D Managers, Innovation Leaders, Product Development Teams, Continuous Improvement Specialists	They build innovation teams and ensure diverse perspectives are included in ideation and product development.
7. Process – Sourcing (Supply Chain)	Head of Procurement, Strategic Sourcing Managers, Supply-Chain or Operations Leaders	They select and manage suppliers, ensuring inclusive and ethical practices in sourcing and long-term partnerships.
8. Practices (everyday behaviours)	Representatives from all departments and levels: team leaders, project managers, front-line staff, support functions (IT, Finance, Operations)	Captures how transcultural competence shows up in daily work, team collaboration, feedback and conflict management.

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## Phase 2. Guiding the completion phase

- Give each participant the questionnaire, the User Manual and the score file.
- Ask them to complete the evaluation (for all users it should take around 20-30 minutes per category to complete the checklist, and at least 1 hour to create conversation over it).
- Encourage everyone to write down comments or examples. Remind them that honest reflection is more important than “good” scores.
- Make use of the Helpful Questions at the end of the checklist in order to guide the conversation

## Phase 3. Collecting all the results

- Gather all the results (check if everybody sent their score file filled in properly)
- Paste the results to the main file and get the category and/or organizational overview
- Prepare the file to show it at a reflection meeting. In summary, this would be the reflection that your organisation would be carrying out.

CATEGORY	SUBCATEGORY	RECOGNIZE (A)	CONNECT (B)	LEVERAGE (C)
PURPOSE	Values, Vision & Strategic Objectives			
	Leadership			
PROCESS	Human Resource Management			
	Communication			
	Marketing & Customer Service			
	Innovation Management / R&D			
	Sourcing (Supply Chains & Value Creation)			
PRACTICES	Supporting autonomy and empowering teams			
	Leadership communication practices			
	Employee communication practices			
	Accountability			
	Everyday feedback			
	Informal learning			
	Collaboration			
	Dealing with conflict			

## FACILITATOR'S ROLE

### Phase 4. Running the debrief workshop

- Plan a meeting of around 60–90 minutes and invite all relevant participants (if in one department/role there were several people involved in the assessment, in order to keep the group dynamic, please consider inviting one representative).
- Run the session and remember to:
  - Present the map showing the results from the score file (A\_recognize, B\_connect C\_leverage) so that everyone can see the overall picture.
  - Complement the data with qualitative insights. Share selected comments that illustrate important points.
  - Invite participants to talk about what surprises them, what they agree with and where they see gaps or opportunities.
  - Guide the group to identify two or three priority actions and to agree who will be responsible for each action and by when.

In order to run the workshop effectively you can follow the instructions on the next page.

## INSTRUCTIONS FOR THE DEBRIEF WORKSHOP

It is time to prepare the presentation of the results and the closing meeting. You can use the questions listed below as an inspiration or a scenario for the reflection meeting with your colleagues.

Remember the aim of this meeting is to:

- Make sure everybody understands each other's perspective on the current approach to cultural diversity in the organisation - making sense of the results.
- Start a constructive conversation. Because the questionnaire has been completed by different groups inside the organisation, the results reveal where perceptions are similar and where they differ in each group. These differences often spark the most valuable discussions within teams. This does not mean that you should try to impose a common way of doing things for everyone, but rather you should encourage different teams, departments, etc. to exchange on their perspectives where they differ, to get a better understanding of internal diversity and how it plays out.
- Identify practical next steps. The assessment highlights areas of strength and areas that need attention, so you can decide where to focus your energy and resources.

To make the conversation inclusive:

- Use flipcharts or an online whiteboard to capture ideas.
- Invite quieter voices to speak and ensure that no single group dominates.
- Keep the focus on collective learning rather than individual performance.
- Use the questions listed on the next page as an inspiration

Use the results of the self-assessment to define improvement actions and follow up on them by applying the PDCA cycle (plan, do, check, act) with regular reviews, identified responsible parties, and systematic reporting (you can use attached Action Planning Sheet on page 9).

## FACILITATION QUESTIONS FOR THE DEBRIEF WORKSHOP

### OPENING QUESTION

- In general, do you consider your organization is sufficiently agile when it comes to taking advantage of cultural diversity?

### PRIORITIES

- Which category is most important for your organisation?
- What is the lever that would generate the most change in the organisation?
- What would have the greatest impact?
- In which areas is there the most room for improvement? In the purpose, the process or the practices?

### IDENTIFY THE RELEVANT ACTORS

- Who are the key stakeholders for carrying out the following steps?
- What can we do to encourage our employees and leaders to view each intercultural interaction as a learning opportunity?
- How can we promote a shift in perspective, from focusing on differences to focusing on what we have in common?

### LOOK FOR ALIGNMENT

- Do you consider that practices are connected to your values?
- Are processes and structures aligned with your purpose? Do processes allow you to put your purpose into practice?

### STRENGTHEN CONNECTIONS

- What opportunities can we offer to encourage exchange and cooperation within your organization and with external stakeholders?
- Who can learn from each other across groups and structures, and how can this be facilitated?
- What are the key moments and interactions? Where do they occur? In what context?

## FACILITATOR'S ROLE

### Phase 5. Following up

After the workshop prepare a short written summary that includes:

- The key insights from the discussion,
- The agreed priority actions,
- Names of those responsible for follow-up.

Share this summary with all participants and schedule a check-in (for example after three to six months) to review progress and adjust actions if needed.

To ensure continuous learning, plan a follow-up or re-assessment. This allows the organisation to reflect on what has changed, measure progress and identify new priorities for development.

## ACTION PLANNING SHEET

DIMENSION	CATEGORY	INITIATIVES	PRIORITY	BUDGET	RESPONSIBLE	DEADLINE	SUCCESS INDICATOR

# NOTES



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