



## ABOUT BECOMING A SITUATIONAL OUTLOOK QUESTIONNAIRE® QUALIFIED PRACTITIONER



## Situational Outlook Questionnaire<sup>SM</sup>

The Situational Outlook Questionnaire<sup>®</sup> (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.

### Who administers the Situational Outlook Questionnaire<sup>®</sup>?

Only those who are qualified by CPSB can administer, interpret, and apply the SOQ. End-users of the SOQ complete the measure on-line. The data is then processed to provide group results for presentation and interpretation. Feedback is prepared, depending on the initial focus 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 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

## How to become a Qualified SOQ Practitioner

The purpose of the qualification program is to prepare the practitioner and provide the required knowledge and skills to apply the SOQ and deliver SOQ Services. Those who seek to become qualified must successfully complete a qualification program that emphasizes knowledge of the assessment and the practical application and administration of the SOQ.

### The program is designed to help with:

- **Knowing the measure** – SOQ services are based on the assessment itself, so Qualified Practitioners must know what is being measured as well as how and why it does so.
- **Positioning the SOQ to meet needs** – Once a Qualified Practitioner knows about the measure, the next step is being able to identify appropriate opportunities to apply it, along with the services associated with the approach.
- **Administering the SOQ** – The Qualified Practitioner must be able to take a lead role in planning to acquire the data in such a way that the client(s) finds the information and insights useful.
- **Analyzing and Interpreting the Results** – Following successful administration of the SOQ, the Qualified Practitioner must be able to read, review, and understand the results before communicating them to the client and end-users.
- **Communicating the Results** – Once prepared, the Qualified Practitioner must know how to share the results with the appropriate audiences to ensure comprehension and the ability to take actions for improvement.
- **Helping the Client Make Change Happen** – SOQ Services are designed to help those who lead and manage organizations and teams make their climates more productive, innovative, and ready to sustain change. The Qualified SOQ Practitioner partners with the client(s) to help them make change happen.
- **Following Up and Following Through** – A Qualified SOQ Practitioner develops a relationship with the client(s) so that when there is a need for follow up, the client knows whom to call.

## What makes a good Qualified SOQ Practitioner?

First and foremost, the practitioner should be a professional – Someone who understands and believes in a systems approach to change and innovation; and sees the context as an important part of that system.

### Potential Qualified SOQ Practitioners:

- Must be in a context that recognizes and reinforces the ethical standards associated with human assessment.
- Must be professionals who have client contacts that they can and should approach, who would benefit from the use of the SOQ.
- Are internal specialists and professionals in Human Resources or Organizational Design roles who are committed to regular use of SOQ Services to assist line and business unit managers in meeting their innovation challenges.
- Can also be consultants who work through an SOQ Distributor to obtain and use the SOQ.

## How do I get qualified?

The SOQ Qualification Program can be provided in a variety of formats. In some cases, the program can be done through distance learning. On other occasions it's been provided as a multi-day face-to-face training program. It has also been conducted through a blended approach including some distance learning supplemented by a short face-to-face tutorial.

**You can call CPSB to discuss the best approach for you with one of our trainers.**

**You can also download some Technical Resources to learn more. Just go to [www.sogonline.net](http://www.sogonline.net) and select the "What is Climate" tab, then choose "Learn More."**

- Applying the SOQ** – This 30-page Technical Resource provides numerous case studies and examples of how the SOQ has been applied for organizational improvement, team, and leadership development.
- A Summary of the Evidence for the SOQ** – This 35-page Technical Resource provides an overview of the evidence regarding the reliability and validity of the SOQ, as well as 18 benchmarks illustrating the usefulness of the assessment.

- c. **Conceptual and Historical Foundations of the SOQ** – This 83-page Technical Resource details the seminal work for Göran Ekvall and overviews the dimensions and elements that are assessed systemically by the SOQ.
- d. **Development of the SOQ** – This 190-page Technical Resource summarizes each stage of development of the SOQ including the initial translation and validation of Ekvall’s CCQ through numerous versions aimed at improving the reliability and validity of the measure.
- e. **Psychometrics of the Current Version of the SOQ** – This 26-page Technical Resource provides details of the item and dimension performance of version 7 of the SOQ.
- f. **Readings and Resources on Creative Climate** – This 66-page Technical Resource provides an annotated bibliography of theses and dissertations that have used the SOQ, articles and chapters that focus on the CCQ or SOQ, other related articles, chapters, books, and monographs related to the climate for creativity, innovation, and change.
- g. **SOQ Glossary** – This 27-page Technical Resource provides definitions of many of the technical terms related to assessing the climate for creativity, innovation, and change.

## Benefits of Becoming a Qualified SOQ User

Qualified SOQ Practitioners acquire additional Technical and Practitioner Resources such as: Analyzing and Interpreting the SOQ, Administering and Scoring the SOQ, Analyzing SOQ Narratives, as well as Case Studies for Team, Organizational, and Leadership Applications of the SOQ. They also receive an extensive deck of PowerPoint Slides to help them communicate about the SOQ.

Qualified SOQ Practitioners also have access to an additional secure level of the SOQ web site that provides access to all digital resources anytime, anywhere. They also “join” a growing community of practice and thought leaders.

## For More Information Contact:

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