



Meritas Advisory Group, LLC
Business & Talent Strategists

NAMI Georgia Talent Optimization Case Study

Introduction: NAMI Georgia is a leading non-profit mental health authority dedicated to promoting mental health awareness and providing support to individuals and families affected by mental illness. In 2020, the organization faced challenges related to employee satisfaction and organizational cohesion, leading to concerns about the overall effectiveness of its programs and services.



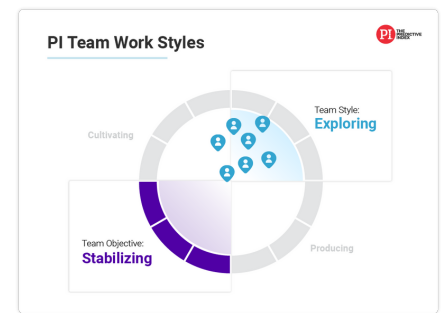
Executive Director Kim Jones recognized the pressing need for improvement and took swift action to address the challenges faced by NAMI Georgia. She collaborated closely with Meritas Advisory Group, sharing what she had already implemented and areas of concern to gain valuable insights and expertise.



Understanding the importance of a strategic approach, Kim requested that Meritas Advisory Group created a comprehensive roadmap to accelerate her efforts to transform the organization.

Meritas Advisory Group responded with a tailored plan encompassing coaching, leadership development programs, and a range of predictive index tools, including PI Design, PI Hire, PI Diagnose, and PI Inspire.

Immediate actions by Executive Director Kim Jones, in collaboration with Meritas Advisory Group



1

Engaging Meritas Advisory Group: Recognizing the need for expert guidance in addressing the organization's challenges, Executive Director Kim Jones decided to partner with Meritas Advisory Group. Meritas is renowned for its expertise in organizational development and employee engagement strategies.

2

Behavioral Assessments: Meritas conducted behavioral assessments using predictive index tools to understand the organization's workforce better. These assessments provided valuable insights into employees' behavioral patterns, work styles, and communication preferences.

3

Employee Engagement Survey: An employee engagement survey was conducted to identify specific areas of concern and opportunities for improvement. The survey gathered anonymous feedback from employees, allowing them to express their thoughts openly and honestly.

4

Cultural Development Workshop: Based on the survey and assessment results, Meritas facilitated a cultural development workshop. The workshop aimed to foster a positive work culture, enhance teamwork, and create a supportive environment where employees could thrive.

5

Onboarding System: Recognizing the importance of a comprehensive onboarding process, NAMI Georgia implemented an onboarding system to welcome new employees and ensure they assimilate smoothly into the organization's culture.

6

Updating Job Descriptions: To clarify roles and responsibilities, job descriptions were updated to align with the organization's current needs and strategic goals. This step aimed to enhance job satisfaction and empower employees to excel in their roles.

7

Aligning People to the Business Strategy: Meritas worked with NAMI Georgia's leadership team to align employees' individual goals and initiatives with the organization's overall business strategy. This strategic alignment helped create a sense of purpose and direction among the workforce.

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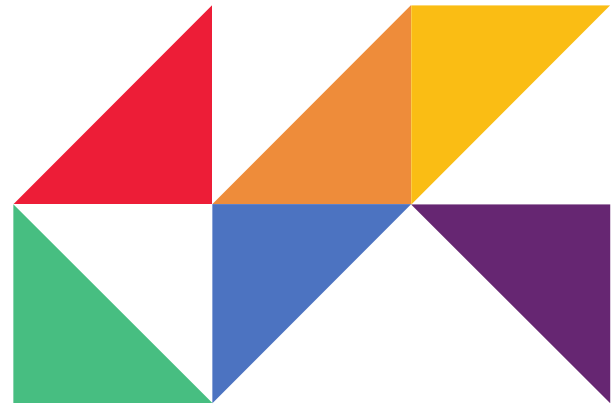
Holding People Accountable: Meritas introduced accountability measures to ensure that employees and managers take ownership of their responsibilities and actively contribute to achieving the organization's objectives.

9

Aligning Talent to the Strategy with PI Hire Tool: Another crucial action taken was to ensure that people were well-suited for their positions by using the PI Hire tool. This tool helped identify the right talent for each role and facilitated necessary changes, which involved some employees leaving the organization while new and better-fitting talent was brought in.

Initial Situation

- **Employee Engagement:** In 2021, NAMI Georgia's employee engagement score was at 52, indicating a lack of connection and motivation among staff members. Low engagement levels were impacting productivity and potentially affecting the quality of services provided to the community.
- **Job Satisfaction:** The job satisfaction score for 2021 was 62, suggesting that employees were content but needed to be more satisfied with their roles. The organization recognized the need to increase job satisfaction to retain talent and ensure a stable workforce.
- **Manager Satisfaction:** In 2021, manager satisfaction was rated at 61, signaling possible issues with leadership effectiveness and the need for additional support and training for managers.



PI Strengths & Blind Spots

Strengths

Impact on Engagement	Comparison to Benchmark	% Favorable
I have the resources (e.g. team members, tools, technology) to perform my work at a high level.		100
Our processes and procedures are not obstacles for me to get my work done well.		93
In my day-to-day work, I am gaining valuable skills and experience that will help me in my future career.		88

Blind Spots

Impact on Engagement	Comparison to Benchmark	% Favorable
The senior leadership of my organization has communicated a vision of the future that motivates me.		66
Our processes and procedures are not obstacles for me to get my work done well.		58
Where I work, people are rewarded solely based on their performance, not by politics or other processes.		67
Senior leaders have clearly explained the reasons behind the changes made in the organization.		19
I believe this company puts as much energy and investment into its people as it puts into achieving its business goals.		0

Engagement Survey Sample

People (Co-worker/Team Dynamics): The "People" category scored 48 in 2021, indicating team dynamics and employee collaboration challenges. This could be hindering effective communication and cooperation within the organization.

Organization Satisfaction: Although the organization satisfaction score was at 55 in 2021, there was a slight decrease compared to previous years, signaling potential concerns about the overall culture and work environment at NAMI Georgia.

REMARKABLE IMPROVEMENTS



Employee Engagement

By 2023 Q2, the employee engagement score surged from 52 to 72, reflecting a remarkable increase in employee motivation and commitment to NAMI Georgia's mission.

01

Job Satisfaction

Job satisfaction improved significantly from 62 in 2021 to 72 in 2023 Q2, indicating that employees were more content and fulfilled in their roles.

02

Manager Satisfaction

Manager satisfaction soared from 61 in 2021 to 80 in 2023 Q2, indicating that leadership training and support had a positive impact on managers' effectiveness and job satisfaction.

03

Team Dynamics

The "People" category showed substantial growth, rising from 48 in 2021 to 78 in 2023 Q2, highlighting a significant improvement in team dynamics and collaboration among employees.

04

Organization Satisfaction

Despite the slight dip in 2022, organization satisfaction bounced back to 63 in 2023 Q2, reflecting the success of the initiatives in improving the overall work environment at NAMI Georgia.

05

CONCLUSION

Through the strategic decisions and actions taken by Executive Director Kim Jones in collaboration with Meritas Advisory Group, NAMI Georgia witnessed a transformative journey toward a more engaged, satisfied, and cohesive workforce. The implementation of behavioral assessments, employee engagement surveys, cultural development workshops, onboarding systems, updated job descriptions, strategic alignment, accountability measures, and the use of the PI Hire tool played a pivotal role in revitalizing the organization's employee satisfaction levels and strengthening its mission to support mental health within the community. The alignment of talent to the strategic direction ensured that the right people were in the right roles, contributing to NAMI Georgia's continued success and positive impact on mental health advocacy.

AUTHOR



"I have had a driver's seat view to witness the transformation of NAMI Georgia over the last three years. It is inspirational to see and aspirational for many other organizations." I look forward to our continued talent optimization journey with NAMI Georgia.

Meritas Advisory Group is a business and talent strategy company that supports organizations on their talent optimization journey by aligning their talent to their business strategy.

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TESTIMONIAL



"We have worked hard to improve the culture of NAMI Georgia, and I am grateful for the support of our Board of Directors, our team leaders, and Meritas Advisory Group."

Our mission is to provide advocacy, education, support, and public awareness so that all individuals and families affected by mental illness can build better lives.

KIM JONES

Executive Director - NAMI Georgia