

Q1 Wins And Great Things: What happened in the organization during the last period/quarter, or coming up next period/quarter, that deserves attention or celebration? Especially share any news from your team or department that is relevant to the entire organization, but they may not know about.

Answered: 25 Skipped: 0

#	Responses	Date
1	The acknowledgement that so many of our customers want to be led by us so the addition of project managers to our team. Awesome! Shannon and Ceci graduating from the CXEA. Love this!	11/2/2016 11:16 AM
2	Getting Certified in Data Conversion, and getting my first Data Conversion under my belt.	11/2/2016 10:30 AM
3	Business has been booming! Our sales teams have done an awesome job, while our Client Engagement managers have served as the backbones.	11/2/2016 10:09 AM
4	The entire Mosaic team is working hard to meet quarterly priorities and client commitments.	11/1/2016 4:46 PM
5	We have been able to weather the storm, and do so with a grace and style that represent Mosaic's internal core value of "Being the Duck". We have had many wins on the personal front, Ryan, Amanda and Mike closing on their homes, Diana having her baby, Lisa becoming CPP certified again...all great wins and morale boosts for our fellow Mosaicians!	10/31/2016 11:11 AM
6	Great quarter, a lot of hard work and attention around Clarizen and our processes. It's exciting to see us growing and providing more clarity around the work that we do,	10/31/2016 9:30 AM
7	Consulting - Dennis Maddox has brought much needed structure and experience Sales - increased activity has created more and more opportunities	10/28/2016 11:42 AM
8	Nothing to report.	10/28/2016 10:58 AM
9	Hours have picked up (maybe a bit too much!) which is great for those of us who have struggled this year. New homes, new babies, new puppies - all great things!	10/28/2016 10:54 AM
10	A lot of new hires! I think that shows the growth of our team and our reputation in the Ulti community.	10/28/2016 10:43 AM
11	The new hires from last quarter finally getting through training.	10/28/2016 10:25 AM
12	Everyone is at 150% utilization. Well, maybe not 150%, but it seems that way, doesn't it?	10/28/2016 10:12 AM
13	100+% utilization for the past several weeks	10/26/2016 5:36 PM
14	Recruiting! Each candidate that I have spoken to seems like a great fit for Mosaic. HR (with the help of others as well) really dug deep and figured out what is it we are looking for. I love/appreciate the emails that go out, notifying everyone on the team of an open position! The new Org Chart and structure. Kudos to everyone who contributed to putting this together. MCE version 1!	10/25/2016 12:45 PM
15	I feel we are starting to get some structure in the organization and that there is a lot of work available, compared to prior quarters where there were a lot of thin weeks.	10/24/2016 9:14 PM
16	I think it's great that some of the new members not only met their billable hours priority, but even went over as well!	10/24/2016 4:43 PM
17	Going LIVE in Clarizen. I know it was not perfect but huge kudos to Andy, Matt and Jason for working diligently on this project. Resource forecasting and better way to manage projects is SO important!	10/24/2016 11:32 AM
18	Halma is up and running with Tax Recon & Garnishments. We have a wonderful new team member in MPS - Lyle Spann	10/24/2016 8:34 AM
19	All the go-lives from last quarter.	10/23/2016 12:06 PM
20	The Clarizen implementation was a success with everyone using Clarizen for time tracking!	10/22/2016 10:19 AM
21	We signed our first HRO client, Quantcast. We are very close to filling all of our last open positions for 2016!	10/21/2016 2:59 PM

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22	Performance of the team over the quarter and Billed Hours report view! Clarizen Go Live! A system that will provide visibility into project performance and resource forecasting.	10/21/2016 12:50 PM
23	Management told us the wave of business was about to crest, boy did it!	10/21/2016 11:42 AM
24	Open enrollments are nearly done!	10/21/2016 9:55 AM
25	This quarter has been busy which is good for us financially. We seem to try and over utilize our consultants with new client engagements and are not focusing on the opportunities presented to us by our currently existing clients. It appears quantity and hitting the financial mark is the directors Goals which will eventually take away the Quality aspect we hold so dear with our clients.	10/21/2016 8:54 AM

Q2 Feel Of The Team: Looking back over the past period/quarter, how is the 'feel' of your team and/or the organization? Please include any positive or negative feedback that is relevant to the entire organization.

Answered: 24 Skipped: 1

#	Responses	Date
1	Love the addition of new consulting team members! Their varied backgrounds and perspectives will only make us stronger/better.	11/2/2016 11:16 AM
2	Team is always helpful, and always ready to assist without making you feel stupid. To clients, I think team is very smooth sailing and professional.	11/2/2016 10:30 AM
3	The team appears to be burned out. While increased business is great, we are not necessarily equipped with the staff to meet the needs.	11/2/2016 10:09 AM
4	The team is trying to absorb the continued system and organizational changes along with the increased 4th quarter workloads.	11/1/2016 4:46 PM
5	By far this has been the toughest quarter that I have experienced since becoming a Mosaician. The overall feel of the team can be described in two words: stress and chaos. I do not think that the leadership team has a complete grasp on just how much people are overwhelmed and the amount of pressure that the front line and management teams are under. There is anxiety all over the organization, and yet when those things are brought to the surface, it is countered with "we have to grow" instead of being acknowledged for what it is - a turbulent time in our development as a company. It turns people off, and I am speaking for myself, from being truly transparent. Often, it appears the rebuttals to concerns are already scripted, and therefore insincere. The recent communication around billable hours worked was pretty insulting – essentially, just continue to kill yourself so that we can go to Club. Citing the national workweek average does not address the issue. We should be identifying ways to work more efficiently and effectively – if the national average is over 50 hours per week, is it really worth celebrating that we are "only" working 45? Billed hours are not a complete reflection of how much someone is truly working, only what can be billed to the client, but this has been said on several occasions and continues to go unacknowledged.	10/31/2016 11:11 AM
6	Personally, I think it's a little ironic but the team seems very stressed out. Last quarter everyone was concerned about the surge of people being hired, there were some comments about how there may not be enough work to go around. This quarter everyone is so busy! I'm happy we prepared and built up our team to be able to work through our busy season and continue to grow our client base.	10/31/2016 9:30 AM
7	Very good. Things are very busy but as a whole the feel is very optimistic	10/28/2016 11:42 AM
8	Team is exhausted. Organization is awkward. There seems to be a perception that Clarizen went well and from my vantage, it did not. Training was choppy and inconsistent. Questions were shoo'd away and we were told that it was planned, but no communication of that plan. Dates were converted wrong and buckets were converted inaccurately. Next time incorporate key players that will be using the system instead of dumping bad data on those having to use it each day. How can we be held responsible for hours with this system in place and not accurate?	10/28/2016 10:58 AM
9	I know everyone who is eligible is excited about Club being back on...but the billable hours report is starting to cause concern. Q4 is always busy, we all know that, but over 100% utilization for most of the team for weeks straight doesn't leave much room for life. The focus should not be on Club, it should be on making sure we are not overwhelmed. Our personal lives suffer, and our clients suffer.	
10	There are sometimes when it appears that some employees are valued differently or who it appears to the rest of the team, receive preferential treatment. There are some within the organization that are not living our core principals, particularly when engaging other team members. This make me take pause and wonder if that is the case when they engage clients as well. We should all feel that we are treated equally and valued equally.	
11	I think my team is a little worn out. We went from a light load to being fully book almost over night.	10/28/2016 10:25 AM
12	The work load has us a little stressed, but we all know it's temporary, so we're surviving. Lots of supportive words flying back and forth.	10/28/2016 10:12 AM

Vicki, Question 5
 This is an example of feedback that is not professional, helpful or respectful. There are no suggestions in here on how to improve nor is there any sense of personal accountability.

Vicki, Question 8
 Another example of feedback that is not professional, helpful or respectful. There are no suggestions in here on how to improve nor is there any sense of personal accountability.

Vicki, Question 10
 If this is truly an issue, then I encourage you to call me directly to discuss. Otherwise, there is no action I can take to address.

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13	We have a great team I do understand with growth comes change but we had a realignment of teams, a new time keeping system that is causing us to spend additional administrative time to know where we are on our projects on top of 100+ % utilization it is a little much all at the same time. Teams seem irritated and fatigued.	10/26/2016 5:36 PM
14	Increasing division between consulting and admin.	10/25/2016 12:45 PM
15	I feel there is constant change with the team, a lot of new people I can't wait to meet.	10/24/2016 9:14 PM
16	I think my team is very patient and helpful. With people being so busy it's easy to brush someone off, but instead they will take time to assist and make sure you understand something. That's not something you can find in every organization.	10/24/2016 4:43 PM
17	The feel of the team has been a little uptight. I think several people had a rough quarter.	10/24/2016 11:32 AM
18	I feel that our team is doing great. We have (2) new members that are going to help us grow.	10/24/2016 8:34 AM
19	I think the overall feel is doing well. I know we are transitioning into our new teams right now and while reporting has changed, maybe jobs haven't changed yet, as we finish out projects. I am excited to see where we are in the coming months once things have fully transitioned.	10/23/2016 12:06 PM
20	We have moved from last quarter's meeting with everyone concerned about why we hired additional resources and how we would have work to maintain those resources to this quarter's meeting with everyone concerned about why we have not hired more resources to manage the work load. Finding the balance from quarter to quarter is critical.	10/22/2016 10:19 AM
21	Positive: We have defined (see below) who Mosaic is going to be as a company and how we are going to work. Negative: I believe we need to have more personal and peer accountability when we are not living up to the commitments below. Mission - make a difference and inspire confidence Core Values - Own it, Teamwork, Wow, Do the right thing, Be the Duck Mosaic Health - Trust, Conflict, Commitment, Accountability, Results Mosaic Client Experience - Know and deliver the standards we built	10/21/2016 12:50 PM
22	It has been an exhausting last month.	10/21/2016 11:42 AM
23	I love my team. It's really great to be part of an organization that really cares about the well being of employees and doesn't see them as just numbers.	10/21/2016 9:55 AM
24	Team members are great. Management has been very stressed I can tell this quarter with all the new organizational changes and their responsibility to assign new billable opportunities to the resources. But management and directors have to understand the work before putting the work on one of our resources. Response from client "Denise M. is too aggressive". Let's not intimidate our clients please.	10/21/2016 8:54 AM

Q3 Lessons Learned: During the past period/quarter what are the losses, struggles and disappointments that occurred, and more importantly, what did you learn from those events that should be shared with the entire organization?

Answered: 20 Skipped: 5

#	Responses	Date
1	Struggles: New systems. Change is always difficult but the confidence levels in the new tools seem to be very low.	11/2/2016 10:09 AM
2	The organization is still growing rapidly and we are still struggling with some of the changes and how to implement change internally.	11/1/2016 4:46 PM
3	The Clarizen implementation was an absolute disaster. If we as consultants implemented our clients systems the way that we implemented this new system, our company would be in serious jeopardy. This was done very poorly with no training, no project management and bad data going into the system. It was extremely rushed, causing unnecessary frustration for people. Did we need a new system? Perhaps. Was Clarizen the best choice? I am not so sure. There was no visibility into the selection process, so I am not confident that this system is the right one based on the experience so far. Our clients are out of control and we need to reign them back in – when do we ever say no? I have personally had to reset expectations many, many times during this quarter to realistic ones. We cannot be all things to all people, and we should not be “yes” people, especially when we know that this is not within the best interest of the client. However, the pressure to conform comes from the client to the leadership and management teams, which then is conveyed to the consultants – so we are just doing what the client tells us to do and not consulting. There are some clients that just do not fit our culture and are not at all collaborative, yet we continue to service them at the expense of our brand, and most importantly, our team. This quarter, I have learned so much about patience and how to properly exercise it. I do not like feeling rushed or like things are incomplete; however, I have felt this way more than I care to admit. I have also learned when to speak up and when to observe - there are certain battles that are not worth fighting anymore.	10/31/2016 11:11 AM Vicki, Question 3 Much of this is inappropriate and lacks personal accountability.
4	I think we've learned that there is no such thing as over-communicating internally. We have come a long way with our communication but there is still room to improve and I believe we are moving in the right direction	10/31/2016 9:30 AM
5	Service defects, especially those that are client facing, should be shared as lessons learned	10/28/2016 11:42 AM
6	See answer 2	10/28/2016 10:58 AM
7	The hiring in the year now makes more sense, but it still feels unbalanced.	10/28/2016 10:54 AM
8	Too many tasks without sufficient resources to succeed. Resource management is key. Burn out, not just at the consultant level, but organizationally, is occurring.	10/28/2016 10:43 AM
9	We all need a breather from time to time.	10/28/2016 10:25 AM
10	I can't think of any	10/28/2016 10:12 AM
11	I was so excited about having an easier and more efficient way to enter time but what a let down Clarizen has been a huge struggle and disappointment. We were told it would be easier it would be better but that has not proved to be the case. Entering time is easier but there are so many other items other than just entering time that a Consultant needs from the data. When Mosaic implements UltiPro there is methodology used to insure success. Everyone employed by Mosaic that is implementing any type of software should follow the same methodology it works and is proven. From an end user perspective Clarizen was slammed together at the last minute and rolled out without data validation, adequate testing, balancing, little to no training for employees, managers or project managers. The only communication received 9/23/16 indicated the roll out plan and basically said all items would be completed by 10/5/16 and items are still not completed rolling into 4 weeks now. We would never roll out UTM in this condition and ask an external client to grin and bear it or slap their hand when they ask why and when so why have we done this internally? We hear all the time enter time daily, enter time daily, submit by 5pm Central on Sunday. What about approving time? Since Clarizen has been live time sits pending/unapproved for two weeks. My lesson learned is to follow my gut instinct when my gut tells me to manually track just in case; manually track because recreating after several weeks is much more difficult not to mention time consuming.	10/26/2016 5:36 PM Vicki, Question 11 This is another example of feedback that is disrespectful and unprofessional and will no longer be responded to or addressed.

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12	One of the main struggles people are having is change. I feel this was a struggle last quarter and could continue to be for a while. It is evident that Mosaic is growing and with that comes change. Many people are resistant to the changing tools, faces, etc but these are all things that will help to better our company. I learned to just breathe and ask questions when things arise that you do not understand. We are all in this together, and I know the decision makers want nothing but success for us.	Vicki, Question 12 Thank you! This is great feedback. Yes, we have challenges and struggles but continue to ask questions until you have clarity. Way to own it!
13	Over the last month I feel overwhelmed keeping up with my workload. During one on ones it is explained this is common for everyone and it's being addressed. However, work is still being sent my way and I feel the clients are suffering because we are so stressed. I hope better forecasting methods are being looked into.	10/24/2016 9:14 PM
14	The key struggle I experienced was having to be reliant on others for key information needed for a project to be completed on time. I learned that in those situations the only thing you can do is look for other areas in the project where you can make up the time.	10/24/2016 4:43 PM
15	I have had a rough quarter but it has been a learning quarter-- you grow outside your comfort zone. I learned to SLOW DOWN and say no.	10/24/2016 11:32 AM
16	We lost a good long time client - TMCC. I wish that we could have figured out a way to keep them, but not knowing why they decided to change Payroll Software kept us from doing that.	10/24/2016 8:34 AM
17	Struggles - Internal Tools: We do not roll out products fully completed, but as works in progress and then play catch up.	10/21/2016 12:50 PM
18	Still struggling with the Clarizen transition. Having to toggle and document in multiple systems during this incredibly busy time is a challenge.	10/21/2016 11:42 AM
19	One of my biggest lesson was learning how to manage a variety of clients. As a HRIS specialist my job was to jump on every email and request right away. As a consultant my job is to provide the best possible service to all my clients which means I sometimes need to let a client know that I will not be able to complete their request right away and give them a timeline for completion.	Vicki, Question 19 What great insight! Thank you for sharing this.
20	maximizing consultants at 100% all throughout the organization this quarter does not leave room for emergencies with our current clients. Plus it does not allow room for new clients unless we transition old clients to new consultants	10/21/2016 8:54 AM

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Q4 Outstanding Players: From your perspective, who are the team members that have stood out this period/quarter as outstanding players? And why do they deserve recognition?

Answered: 25 Skipped: 0

#	Responses	Date
1	Denise Maddox and the managers. They have been working so hard to refine and improve how we engage. Thank you all for you very hard work! Dave, Shannon and Ceci. We have an actual "business development team." That's cool! Denise Egan and Meadow for getting our UltiPro working (better) and for our first HRO wins. New business!	11/2/2016 11:16 AM
2	Jack!!! Doesn't matter how busy he is, he is always there with answers, quick and to the point, and no-nonsense.	11/2/2016 10:30 AM
3	Everyone at Mosaic is outstanding! If I have to throw out a name, Nalani Cobb deserves duck of the year. She has taken on multiple positions with little to no fan fare and I am always hearing others praise her ability to treat everyone as if they are her only concern, despite having many.	11/2/2016 10:09 AM
4	Jack continues to be a key team member that always shines. Jason always makes customer service look easy, both internally and externally. Denise Maddux has been doing a great job lead the team since she started working with Mosaic.	11/1/2016 4:46 PM
5	Alex Faulk: Alex delivers consistently and continues to do so. She is a champion for Mosaic and is not afraid of the tough conversations internally or with the client. We need more of this - keep up the good, productive dialogue. Nalani Cobb: Can't say this enough, Nalani just continues to perform despite how much is given to her. She is the unsung hero of Mosaic. Cheri Wadlington: Cheri has helped so many people, myself included, this quarter – and she always does so with a smile despite how full her calendar may be. Cheri ALWAYS makes time for you, which makes you feel very supported. Amanda Edmisten: Amanda has really stepped outside of her comfort zone this quarter, and it has made her a more well-rounded consultant. Great job! Aimee Morgan: I don't know how Aimee is still standing! She has taken on so many projects and challenges this quarter like a true champ. Towanna Nevills: Wow! What a win for Mosaic – Towanna is a Project Manager's Project Manager. She literally hit the ground running from Day 1 and has not stopped to breathe (the weekly utilization report confirms this). :) Andrew Stewart: Andrew always makes my day. He is so great with the team and with the clients and he ALWAYS owns it. Michael Barron: Michael has taken the time to engage deeper with all the teams this quarter, and it shows. I have gotten the chance to know Michael much better this quarter, and I have really enjoyed it. Jared Leffler: Jared ROCKS – Always great with the clients, navigates internal and external priorities very well. Tricia Castle: Great addition to MPS. Although I have not had many opportunities to work directly with her, but she has deep payroll knowledge, which is very useful. She is also very easy to talk to. Dave Burkitt: Dave is awesome. He brings the business acumen needed and understands the industry, but is very personable and approachable. I enjoy having him here.	10/31/2016 11:11 AM
6	Denis Egan, Denise Maddox and Dave Burkitt. These three do SO much work for the entire company, they each serve multiple roles and do everything they can for the success of Mosaic.	10/31/2016 9:30 AM
7	Dennis Maddox - so much completed in such a short period of time - kudos Ceci - MVP	10/28/2016 11:42 AM
8	All the consultants and managers on the team. It amazes me that everyone is still so apt to help when they can and be as busy as they are this qtr.	10/28/2016 10:58 AM
9	Mike B. for always answering my questions when I send them out to the team! Andrew for making our daily huddles much more lively! Michael for being a great leader during our recent transition! Paula for keeping me on track on client calls! Andy for his hard work on Clarizen and for answering questions immediately!	10/28/2016 10:54 AM
10	HR-They have been managing a great deal and really Being the Duck from everything I've seen.	10/28/2016 10:43 AM
11	Andrew, Ryan, Carissa, Kim, Paula, and Jared. Without them, my job would be 100 times harder.	10/28/2016 10:25 AM
12	Towanna Nevills, as she is A. Maze. Ing with Morton. Alex and Cheri always seem to have time for a quick question or chat.	10/28/2016 10:12 AM
13	Carissa for her amazing skills at keeping everything and everyone organized and on track. Alex for always lending a hand and being a wealth of knowledge in the realms of Onboarding, Recruiting and Open Enrollment.	10/26/2016 5:36 PM

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14	Denise Maddox- She hit the ground running and hasn't even looked back. I know finding the right person for this position was not easy, but we struck gold with Denise! She is exactly what Mosaic needs at this time of growth. Even when her schedule is hectic and crazy or she is laying down the law, Denise always has a positive demeanor and helpful information. Lisa- Stellar work with adopting her MCE guidelines right away. She really did Own It and set the example for the rest of Mosaic:)	10/25/2016 12:45 PM
15	Jason has taught me a lot about interfaces and Michael has helped out a lot with activation methodology.	10/24/2016 9:14 PM
16	Jared Leffler and Alex Faulk - They've both been extremely helpful to me and have given me the opportunities to learn valuable information from them.	10/24/2016 4:43 PM
17	Our entire team is great but Andy Ferguson has really stood out to me. He is always willing to help and his plate has been extremely full and he has done a great job moving along MANY projects.	10/24/2016 11:32 AM
18	Tricia Castle - She hit the door running and has really ramped up quickly. She is a great addition to our team.	10/24/2016 8:34 AM
19	Jack - holy smokes dude! You are doing the work of five to keep up! Anyone who took a client live with their implementation, you rock. Those who continue to receive work from repeat clients, way to go! Thanks to a great sales team for keeping the pipeline full. Thank you to those who consistently achieve 80+% each week. Club is in sight!	10/23/2016 12:06 PM
20	This has been a quarter of changes and of seeing the beginning results of our sales strategy. The entire company, every individual, deserves to be recognized for their contributions this quarter - Payroll, HR, Premier Support, Consulting, Finance, Operations, Sales, Marketing. From ultra challenging clients to demanding prospects, to new internal tools, to physical moves, from not enough work to too much work - everyone did a wonderful job of being THE DUCK!	10/22/2016 10:19 AM
21	CECI SPEHAR - Always taking the time to understand the vision and then "fix" the vision. Never saying no (to her detriment, I am sure). Always, always being a team player.	10/21/2016 2:59 PM
22	Consultants and Managers: have really worked to improve billed hours and make Club a possibility again Jack H: provided over and above service in helping create the billed hours report Denise M: getting up to speed and having a great impact on Mosaic Dave and Shannon: several months of pipeline filling and sales closed	10/21/2016 12:50 PM
23	Tiffany - she always makes it happen. Perfect amount of guidance balanced with hands off approach. "I know you got this" Alex - she is always willing to help and so pleasant to work with Jonathan and Mike B - they are always willing to help me figure out my stuck in BI Antoinette - she really stepped up to the challenge this quarter and rolled with the flood of work.	10/21/2016 11:42 AM
24	Alex and Jared have both been great. They've been willing to answer any questions I had with patience.	10/21/2016 9:55 AM
25	Dave continues to rock my face off. An honest man with a plan. Shannon as well. Really opening doors for us as consultants with new opportunities. We just need resources.	10/21/2016 8:54 AM

**Q5 Planning For Next Period/Quarter:
Company Priorities** What are the 3 things that the COMPANY must do in the next period/quarter to move the organization forward? Take the necessary time to think about next period/quarter and what are the most important things for the organization to accomplish. Think beyond just your department.

Answered: 21 Skipped: 4

Answer Choices	Responses
Company Priority #1	100.00% 21
Company Priority #2	80.95% 17
Company Priority #3	57.14% 12

#	Company Priority #1	Date
1	How do we improve our service delivery levels? How can we better anticipate and react to our customers' needs?	11/2/2016 11:19 AM
2	Cross-Train, so that more resources will be available for odd jobs.	11/2/2016 10:34 AM
3	Work/Life Balance	11/2/2016 10:15 AM
4	Utilization for company	11/1/2016 4:59 PM
5	Client Experience	10/31/2016 9:31 AM
6	MCE	10/28/2016 11:43 AM
7	Assigned to us	10/28/2016 10:59 AM
8	Billable hours - get consultants to 85% and maintain that throughout the year	10/28/2016 10:57 AM
9	Clear processes for merit increases	10/28/2016 10:45 AM
10	Maintain growth, but maybe spread it out over the whole year, not just the first and last quarter	10/28/2016 10:24 AM
11	Fix Clarizen immediately	10/26/2016 5:36 PM
12	MCE Automation	10/25/2016 12:46 PM
13	Balance work load/forecast	10/24/2016 9:16 PM
14	Billable Hours	10/24/2016 4:47 PM
15	Client Retention	10/24/2016 8:40 AM
16	Continue transition into new teams	10/23/2016 12:07 PM
17	Productivity - 80% utilization for the quarter for all consulting resources	10/22/2016 10:19 AM
18	Clarizen Forecasting In Use	10/21/2016 12:51 PM
19	over utilization - approaching burn out for many and the last quarter isnt even started	10/21/2016 11:46 AM
20	Continue to please clients so they keep coming back	10/21/2016 10:22 AM
21	client transition plan when new client engagements are being made	10/21/2016 8:55 AM
#	Company Priority #2	Date
1	Improve overall communication between team members on customer needs	11/2/2016 11:19 AM

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2	Stable systems	11/2/2016 10:15 AM
3	Continued adoption and use of Clarizen	11/1/2016 4:59 PM
4	Forecasting	10/28/2016 11:43 AM
5	Assigned to us	10/28/2016 10:59 AM
6	Get Clarizen in order so hours reporting is more accurate	10/28/2016 10:57 AM
7	Better benefits	10/28/2016 10:45 AM
8	Maintain 80% Utilization for all team members	10/26/2016 5:36 PM
9	Continue growth, but at a reasonable pace	10/24/2016 9:16 PM
10	Adopting Clarizen	10/24/2016 4:47 PM
11	New Clients	10/24/2016 8:40 AM
12	Continue to fine tune the implementation process	10/23/2016 12:07 PM
13	Mosaic Client Experience - Automation in tools and Adoption	10/22/2016 10:19 AM
14	Billed Hours on Club Pace	10/21/2016 12:51 PM
15	the "employee experience" to mirror the "client experience"	10/21/2016 11:46 AM
16	Continue to maintain the openness among execs and ees	10/21/2016 10:22 AM
17	Engagement Manager who is also involved with the system	10/21/2016 8:55 AM
#	Company Priority #3	Date
1	Always "be transformational" Never "transactional"	11/2/2016 11:19 AM
2	Travel Expense program	11/1/2016 4:59 PM
3	Assigned to us	10/28/2016 10:59 AM
4	Clear communication about where we're going as a company	10/28/2016 10:45 AM
5	Maintain profit margin	10/26/2016 5:36 PM
6	Thank You's	10/24/2016 4:47 PM
7	Employee Training	10/24/2016 8:40 AM
8	Help prevent burnout as we approach year end	10/23/2016 12:07 PM
9	Expense Reporting Tool Selected & In Use	10/22/2016 10:19 AM
10	Eliminate Service Delivery Issues (MCE)	10/21/2016 12:51 PM
11	I don't know	10/21/2016 10:22 AM
12	Bag of thanks needs to be every other Quarter	10/21/2016 8:55 AM

**Q6 Planning For Next Period/Quarter:
Individual Priorities** What are the 3 things that YOU must do in the next period/quarter to move the organization forward? Take the necessary time to think about next period/quarter and what are the most important things for YOU to accomplish. Be specific with your answers. We ask you to begin thinking of these now and we'll finalize them the day of planning. Bring your thoughts with you and you will build upon them during our session.

Answered: 17 Skipped: 8

Answer Choices	Responses
Individual Priority #1	100.00% 17
Individual Priority #2	88.24% 15
Individual Priority #3	58.82% 10

#	Individual Priority #1	Date
1	Make daily goal to meet - Have a specific in mind ahead of time.	11/2/2016 10:34 AM
2	UltiPro Training	11/2/2016 10:15 AM
3	Training on Clarizen project management tools	11/1/2016 4:59 PM
4	Work life balance	10/28/2016 10:59 AM
5	Billable hours - I would like to get back to 34 billable hours per week and keep that going for the year	10/28/2016 10:57 AM
6	Time Management	10/28/2016 10:45 AM
7	Organization.	10/28/2016 10:26 AM
8	Learn to manage my time better	10/28/2016 10:24 AM
9	80% Utilization	10/26/2016 5:36 PM
10	Learn to say no/work life balance	10/24/2016 9:16 PM
11	Fully Utilized	10/24/2016 4:47 PM
12	Become a Certified Payroll Professional	10/24/2016 8:40 AM
13	Productivity - 80% utilization for the quarter for all consulting resources	10/22/2016 10:19 AM
14	Ensure Clarizen forecasting and sales are synchronized	10/21/2016 12:51 PM
15	Utilization for Club	10/21/2016 11:46 AM
16	Increased utilization	10/21/2016 10:22 AM
17	Meet team priorities	10/21/2016 8:55 AM
#	Individual Priority #2	Date
1	Start earlier in day - to be prepared for issues that occur unexpectedly.	11/2/2016 10:34 AM
2	Consultant Shadowing	11/2/2016 10:15 AM

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3	Update PM Playbook based on Clarizen knowledge	11/1/2016 4:59 PM
4	Get up to speed on Ultimate's new release (unable to attend sessions due to workload)	10/28/2016 10:57 AM
5	Process improvement	10/28/2016 10:45 AM
6	Need to Say No	10/28/2016 10:26 AM
7	Learn to say No	10/28/2016 10:24 AM
8	Enter Time Daily	10/26/2016 5:36 PM
9	Catch up on training/new release info	10/24/2016 9:16 PM
10	Ensure Clarizen Plans are correct for every project	10/24/2016 4:47 PM
11	Become more knowledgeable in UltiPro	10/24/2016 8:40 AM
12	Mosaic Client Experience - Automation in tools and Adoption	10/22/2016 10:19 AM
13	Complete 2017 Budget	10/21/2016 12:51 PM
14	Continue to improve time mgt re clients.	10/21/2016 10:22 AM
15	Add resource to projects	10/21/2016 8:55 AM
#	Individual Priority #3	Date
1	Keep better track of deadlines on projects, and try to beat them.	11/2/2016 10:34 AM
2	Determine how Clarizen can be used with Ultimate project planning	11/1/2016 4:59 PM
3	Engaging more with feedback to Leadership	10/28/2016 10:45 AM
4	Attend 2 Training Classes	10/26/2016 5:36 PM
5	Thank those who help make projects successful	10/24/2016 4:47 PM
6	Be the best that I can be	10/24/2016 8:40 AM
7	Forecasting in Clarizen	10/22/2016 10:19 AM
8	Continue to advance corporate health (Mission, Core Values, 5D, MCE)	10/21/2016 12:51 PM
9	I feel like I spend too much time on email and such. I'd like to bring those numbers down.	10/21/2016 10:22 AM
10	lessons learned discussions on our Huddles	10/21/2016 8:55 AM

Q7 Anything additional that you would like to see from the Petra team to make your planning day a better experience overall?

Answered: 11 Skipped: 14

#	Responses	Date
1	No theme, please. Let us spend time with our teams refining and planning.	11/2/2016 11:19 AM
2	Please incorporate more scheduled breaks so that we can keep up with work. This is a busy season and client requests do not stop because of Petra.	10/31/2016 11:11 AM
3	Remind upper management to include users in huge overhauls of tools.	10/28/2016 10:59 AM
4	I can't think of anything I loved the format last quarter	10/26/2016 5:36 PM
5	Do what you do best, COACH! The last few quarters we have been given more time to have open discussion (being it was asked for) but it has not led anywhere. We hire Petra to coach us, so I think we should allow you to do so!	10/25/2016 12:46 PM
6	I would like it if we could spend more time with each other in Team building exercises.	10/24/2016 8:40 AM
7	Stick to the breaks. We always spell out the break schedule but rarely follow it.	10/23/2016 12:07 PM
8	Use the format from the last planning session.	10/21/2016 12:51 PM
9	nothing to add	10/21/2016 11:46 AM
10	No	10/21/2016 10:22 AM
11	Awesome show, Great job	10/21/2016 8:55 AM