

STRATEGY AND ORGANIZATION SURVEY

For each question, rate your organization on a scale of 1-5 with 5 being strongest.
RATING: Where your business is currently. IMPORTANCE: How much does this parameter impact the success of your business. Duplicate values are acceptable.

VISION

We have a clear vision in writing that has been properly communicated and is shared by everyone.

Our core values are clear and we are hiring, reviewing, rewarding, and firing around them.

Quarterly milestones that facilitate achieving annual objectives are maintained and regularly achieved.

Our central focus is clear, and we keep our people, systems, and processes aligned with it.

Our long-term vision is supported by well defined near-term objectives.

Rating

Importance



DATA

A scorecard is in place for tracking KPIs and weekly metrics.

Everyone on the team has at least one KPI they are accountable for each week.

We work against a pro-forma that is regularly tracked and communicated.

Individuals understand how their KPIs drive the success of the organization.

Data input, tracking, and reporting is clear, easy to use, and efficient.

Rating

Importance

PROCESS

We have a defined process, which is names, illustrated, and used in our communication.

The process is specific, consistent, and flexible.

There is a mechanism for regularly reviewing and continually improving the process.

Everyone has clearly defined objectives that they are accountable for.

Our defined processes are documented, simplified, and consistently employed to achieve target results.

Rating

Importance

MARKETING

Our target market is clear, and all of our outreach efforts are aligned with it.

Every team member is aware of our value proposition and their contribution to delivering it.

We have a clear mechanism for reviewing market expansion and diversification opportunities.

Our three differentiators are clear, and our marketing and sales efforts communicate them.

We have systems for receiving and employing the voice of our stakeholders.

Rating

Importance





COMMUNICATION

Everyone is engaged during meetings and planning sessions.

Communication between divisions and throughout the hierarchy is encouraged and frequent.

Individuals at all positions understand their contribution to the whole and feel that they have a voice.

All meetings have a clear purpose, defined outcomes, and regularly achieve both.

All teams promptly identify, discuss, and solve issues for the long-term success of the organization.

Rating

Importance

PEOPLE

All of the people in our organization fit our culture, share our values, and align with our vision.

Commitment creation & accountability procedures are clear, used consistently and used well.

Our organization and accountability chart is clear, complete, and maintained.

Every team member is in the right seat.

Our leaders are open, honest, and demonstrate a high level of trust.

Rating

Importance

Does your current plan include the following:

For each statement, place an x in the appropriate box for "yes" if the statement aligns with your organization's regular practice, and "no" if it does not.

BASIC ANALYSIS

Analysis of the market and specific identification of the segments that constitute your company's targets.

Identification of the needs of each target market segment and how your company will distinctively meet those needs.

Analysis of existing and potential competitors in each segment, their strengths and weaknesses and the special value they provide through their products and services.

Assessment of key customers and their changing needs.

Identification and assessment of the probable impact of industry and external environmental trends such as:

Economic trends, including risks and opportunities.

Political issues, including legislative and regulatory risks and opportunities.

Technological developments, including effects on your company's customers, suppliers and competitors.

Changes and the resultant opportunities in the basic structure of your industry and your key markets.

Yes

No

STRATEGIC PRINCIPLES

Build upon the company's existing strengths.

Leave future options identified and open to allow flexible response to unexpected changes in the external environments.

Are within the capabilities of the company's existing technological, financial and human resources.

Build upon the company's current culture and values.

If change in culture is required, the plan includes a program to evolve the required changes over time.

Yes

No

COMPETITIVE ADVANTAGE

A specific analysis of how the company distinguishes its products and services from those of each competitor.

Identification of potential competitors and the reasons why they might enter the marketplace.

Identification of how the company provides special value in the delivery of its products and services.

Identification of likely responses of major competitors to the company's strategies.

Analysis and identification of how competitive advantage can be developed and maintained in the long run.

Yes

No

THE MISSION STATEMENT

Is your mission orientated toward your customers rather than the owners?

Is it sufficiently unique to your company that it could not equally apply to your competitors?

Does it express a vision and purpose toward which employees will be proud to work?

Yes

No

THE COMPANY'S GOALS

Do they clearly indicate the accomplishments required to proceed satisfactorily in the directions set by the goals?

Do they identify positions related to market share, profitability and employee relations that must be occupied to maintain superior performance over the long run?

Is each backed by specific objectives and strategies?

Yes

No



THE COMPANY'S OBJECTIVES

	Yes	No
Do they clearly indicate the accomplishments required to proceed satisfactorily in the directions set by the goals?		
Are they backed by detailed measurements of performance that can be used to monitor progress?		
Do they relate to specific goals and are they backed by specific strategies?		
Are they realistic and attainable?		

THE COMPANY'S STRATEGIES

	Yes	No
Do they identify the specific initiative that will lead to accomplishing the objectives?		
Do they include estimates of the resources that will be required to accomplish each strategy?		
Do they make sense in relation to the company's resources, capabilities and competitive positions?		
Is there truly a high probability of success?		

IMPLEMENTATION OVERVIEW

	Yes	No
Identification of resources needed to implement the plan.		
An analysis of the company culture and how it will affect plan implementation.		
An analysis of changes needed to the existing: Leadership, culture and communication styles.		
Organization and staffing.		
System of measurement and reward.		
Supporting action plans that detail:		
What must be done.		
Who is responsible.		
Who is responsible.		

ORGANIZATIONAL REQUIREMENTS

	Yes	No
An organizational structure that supports strategy implementation.		
Encouragement of team building and communications.		
Rewards and celebration of success.		
Provisions for obtaining "buy in" at all levels of the company.		



STRATEGIC MANAGEMENT CAPABILITIES

	Yes	No
Clear linkages to your company's: Capital budget.		
Human resources plan.		
Marketing plan		
Operating plan.		
12 to 24 month profit plan.		
36 to 60 month financial plan.		
Mechanisms to monitor customer relationships and changes in their needs.		
Mechanisms to monitor changes to the environment that could potentially alter strategies.		
A process to monitor progress against objectives.		
A process to receive feedback from all employees and shareholders in order to keep the framework alive.		