



INSTRUCTIONS

The purpose of this assessment is designed to help identify areas to unlock the untapped potential of your organization. Review each statement and assign a rating of one through five. Five indicates you strongly agree and one indicates you strongly disagree with the statement. You must answer honestly and be as objective as possible. Be thoughtful about your responses, but don't agonize over each response. Your initial "gut feel" is usually best.

The assessment should not take more than 20 minutes.

PERSONAL

I have a great work/life balance.

I do not feel overwhelmed or like I am playing catch-up most of the time.

I have a personal development plan that is used.

I understand my role very clearly.

I get a solid sense of accomplishment from my work.

PREDICTABLE CASH SYSTEM

I have a clear picture of our cash flow story and know how I contribute.

I am monitoring the key performance indicators for up to six key processes that drive cash and have improvement plans.

We measure labor efficiency and I am implementing initiatives to drive improvement.

I help maintain the assumptions for a rolling 36-month forecast and monitor our ability to meet our projections.

We consistently meet all of our financial projections.

CULTURAL SYSTEM DRIVES EVERYDAY BEHAVIOR

We have clearly articulated our Core Values and all my direct reports know them.

We have clearly articulated our Core Purpose and it drives the daily actions of all my direct reports.

I monitor progress towards our audacious goal.

We have a culture that exemplifies accountability.

HR processes and activities well integrate with the Core Values and Purpose (hiring, orientation, appraisal, recognition, etc.).

TEAM EFFECTIVENESS

Our teams are effective and deliver consistently high performance.

Teams are carefully selected and well balance in talent, knowledge, and experience.

Our teams are given lots of autonomy and latitude to achieve results.

Overall, team vision and objectives are clear and well understood.

Individual roles and expectations are clearly defined and communicated.



CLEAR THREE YEAR HIGHLY ACHIEVABLE GOALS (3HAG)

I have high confidence in our ability to achieve our 3HAG.

We have identified and are working the key differentiators essential to achieving our 3HAG.

I know our 3HAG statement.

I know what we want to be known for in three years.

We have identified and implemented a brand promise guarantee.

PRIORITY ALIGNMENT

There are no more than five annual company initiatives that have been aligned to our 3HAG.

There are no more than five company key initiatives ranked for the current quarter and aligned to annual initiatives.

I have no more than five quarterly initiatives that align with those of the company.

Every week we monitor that sufficient progress is being made toward accomplishing our key initiatives.

Our priorities are aligned to the 3HAG and the achievement of our annual goals.

PRODUCTIVE MEETINGS

All employees are in a daily huddle that lasts less than 15 minutes.

Huddles help our company pulse faster and communicate better.

All employees participate in a weekly meeting.

Weekly meetings keep us focused on our top initiatives, result in solving our problems and challenges, and are productive.

Our monthly meeting keeps the focus on our initiatives, resolves the significant issues, and stimulate learning.

Quarterly and annually, the top management team meets to refine our strategy, establish goals for the quarter, and review progress.

EFFECTIVE USE OF METRICS

We have identified 1 or 2 Key Performance Indicators (KPIs) for every role.

The metrics we monitor are aligned to our quarterly initiatives and 3HAG.

Standards have been set for each KPI to evaluate positive and negative performance. Appropriate actions are taken.

We have established budgets, monitor such, and take appropriate action when there are deviations.

We identified the most critical key performance indicator(s) and I monitor progress towards it.



EMPLOYEE ALIGNMENT

- One person has been assigned accountability for each role.
- One person has been assigned accountability to each key process in the organization.
- Every person in the company knows the metrics that indicate they are performing.
- Everyone in the company is aware of our initiatives, know our progress, and how they contribute.
- We do an excellent job of matching employee talent and skills with their roles.

EXTERNAL ANALYSIS

- We understand our market very well
- I have a strong understanding of how well we are meeting customer needs.
- I have a strong understanding of the marketplace and where we fit.
- The insights from customer feedback are shared in a useful manner at the weekly and monthly executive team meetings.
- We do an excellent job of assessing competitive threats and acting on them.

STRATEGIC CLARITY

- All employees understand our one-sentence strategy and its importance.
- All employees understand our key customer segmentation, and all marketing, branding, and sales language are in alignment.
- We have deliberately chosen a different set of activities that deliver a unique mix of value for our customers.
- All employees can succinctly articulate our unique mix of value and would use the same words.
- Leadership actions are consistent with our strategy.

TRANSPARENCY

- Core Values and Purpose are posted throughout the company.
- Scoreboards are up everywhere, displaying current progress on Initiatives, KPIs, and Critical Numbers.
- We have pictures up in our war room to keep our strategy alive and top of mind.
- We are effectively using a theme to help align everyone to a critical priority, issue, value, or initiative.
- We have put a Talent review in place and update it quarterly. We take timely and appropriate action.

HUMAN CAPITAL MANAGEMENT

- We have created an employee scorecard for every person in the company.
- We have very low employee turnover for our industry.
- We have an effective and efficient recruiting process.
- We have a robust onboarding process for new employees.
- Our compensation and benefit plans are competitive and fair at all levels.



SALES AND MARKETING

Our marketing message is clear, consistent, and sets us apart from the competition.

Overall, we consistently meet our sales goals.

We have a sales playbook which the members of our team follow.

Our sales management is excellent and effective.

Quotas are set and monitored. Appropriate actions are taken.

OPERATIONS

We have established standard operating procedures for all key processes.

Our standard operating procedures are efficient and effective in driving high performance.

Employees are properly trained, understand standard operating procedures, and are held accountable.

We have a quality improvement program.

Quality is measured and posted timely.

EMPLOYEE DEVELOPMENT

Our managers and supervisors do an excellent job of gaining commitment and motivating staff.

Our leadership delegates very effectively.

Our training programs ensure that employees have the knowledge and skills they need to succeed.

We do an excellent job of understanding unique individual needs, concerns, and desires.

Employees have multiple routes to advancement to ensure optimal matches in talent and skills.

CONTINGENCY PLANNING

We have created three financial scenarios: the best, likely, and worst-case scenarios.

We have identified triggers on which to base operational, financial, and people decisions.

I know how many days of cash runway we have under best, likely, and worst-case scenario,

We have a disaster recovery plan for catastrophic events.

We have enough of the right relationships to address our cash position should catastrophe strike.