

Self-Assessment

The Charge:

Imagine that you have just been hired to review your company and the way it conducts its' business. For each item below, circle the number which, from your role as advisor, most accurately reflects the business as it stands today.

1. Priorities & Resource Allocation

1 2 3 4 5

We have no regular meetings to review priorities. We meet regularly to set & review priorities.

2. Liquidity

1 2 3 4 5

We never seem to have enough cash. Cash isn't an issue for us.

3. Planning.

1 2 3 4 5

We have no written business plan. We have a comprehensive, written business plan.

4. Management Structure

1 2 3 4 5

Our employees wear many hats. Employee roles and responsibilities are narrowly defined

5. Planning Horizon.

1 2 3 4 5

Our focus is day-to-day. We have a long-term focus.

6. Business Processes.

1 2 3 4 5

We figure it out as we go. Our business processes are well defined.

7. Employee Development

1 2 3 4 5

We have no formalized development programs. Employee development is well established.

8. Technology.

1 2 3 4 5

We don't have a lot of tech infrastructure. Our tech infrastructure is strong.

9. Metrics & Feedback Mechanisms.

1 2 3 4 5

Intuition plays the key role in guiding the business. Metrics are key to guiding the business.

10. Decision-making.

1. 2 3 4 5

Our CEO alone makes all the key decisions. Most decisions are collaborative

11. Strategic Leadership.

1 2 3 4 5

Our leaders are very involved with the day-to-day. Our leaders work "on" vs. "in" the business.

12. Organizational climate.

1 2 3 4 5

This place changes every time you look around. Change comes pretty slowly around here.

13. Organizational Purpose.

1 2 3 4 5

Where this company is going is crystal clear. Our path forward is uncertain.

14. Customer Focus.

1 2 3 4 5

The customer is at the center of everything we do. We are increasingly inward-focused.

15. Business Growth

1 2 3 4 5

We are having trouble keeping up with our growth. Lack of growth is a primary concern.

16. Competitive Knowledge

1 2 3 4 5

Our competitive knowledge is low. We have intimate knowledge of our key competition.

17. Focus.

1 2 3 4 5

We respond to almost every fire. We have a process to determine and resource our key priorities.

18. Organizational Flexibility.

1 2 3 4 5

We are nimble. We bog down when dealing with new issues or opportunities.

19. Risk Management

1 2 3 4 5

We embrace risk. We are risk averse.

20. Managing Employees.

1 2 3 4 5

Our people policies are ad hoc. We have strong Human Resource systems.

21. Specialized Resources & Expertise

1 2 3 4 5

We have little specialized expertise in-house. We have an abundance of specialized expertise in-house.

22. Demand forecasting.

1 2 3 4 5

Our forecasting is day-to-day. We have strong and reliable forecasting systems

23. Succession Planning.

1 2 3 4 5

We have no succession plan. We have a succession plan that is reviewed regularly.

24. Employee Composition

1 2 3 4 5

Most of our employees started with the company Our employee base is diverse.

25. Leadership Alignment.

1 2 3 4 5

Our leadership is united. Our leadership is divided.

Please add up your scores from each line. My score is /125.

Creating Action

Take 10 minutes to review your individual answers to the self-assessment. From this review, capture your key observations; implications and begin to build a set of actions you will set in place to address those areas you have identified.

Observation	Implication	Action