

ORGANIZATIONAL CHECKUP[®]

FOR EACH STATEMENT BELOW, RANK YOUR BUSINESS ON A SCALE OF 1 TO 5 WHERE 1 IS WEAK AND 5 IS STRONG.

	1	2	3	4	5
1. We have a clear vision in writing that has been properly communicated and is shared by everyone in the company.	<input type="checkbox"/>				
2. Our Core Values are clear, and we hire, fire, review, reward, and recognize around them.	<input type="checkbox"/>				
3. Our Core Focus (core business) is clear, and we keep our people, systems, and processes aligned and focused on it.	<input type="checkbox"/>				
4. Our 10-Year Target (big, long-range business goal) is clear, communicated regularly, and is shared by all.	<input type="checkbox"/>				
5. Our target market (definition of our ideal customer) is clear, and all of our marketing and sales efforts are focused on it.	<input type="checkbox"/>				
6. Our 3 Uniques (differentiators) are clear, and all of our marketing and sales efforts communicate them.	<input type="checkbox"/>				
7. We have a proven process for doing business with our customers. It has been named and visually illustrated, and all of our salespeople use it.	<input type="checkbox"/>				
8. All of the people in our organization are the "right people" (they fit our culture and share our Core Values).	<input type="checkbox"/>				
9. Our Accountability Chart (organizational chart that includes roles/responsibilities) is clear, complete, and constantly updated.	<input type="checkbox"/>				
10. Everyone is in the "right seat" (they "get it, want it, and have the capacity to do their jobs well").	<input type="checkbox"/>				
11. Our leadership team is open and honest and demonstrates a high level of trust.	<input type="checkbox"/>				
12. Everyone has Rocks (1 to 7 priorities per quarter) and is focused on them.	<input type="checkbox"/>				

Toolbox 1

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	1	2	3	4	5
13. Everyone is engaged in a regular Meeting Pulse (weekly, quarterly, annually).	<input type="checkbox"/>				
14. All meetings are on the same day and at the same time, have the same agenda, start on time, and end on time.	<input type="checkbox"/>				
15. All teams clearly identify, discuss, and solve issues for the long-term greater good of the company.	<input type="checkbox"/>				
16. Our Core Processes are documented, simplified, and Followed By All to consistently produce the results we want.	<input type="checkbox"/>				
17. We have systems for receiving regular feedback from customers and employees, so we always know their level of satisfaction.	<input type="checkbox"/>				
18. A Scorecard(s) for tracking weekly metrics/measurables is in place to consistently predict that we are on track to achieve the results we want.	<input type="checkbox"/>				
19. Everyone in the organization has at least one number they are accountable for keeping on track each week.	<input type="checkbox"/>				
20. We have a budget and are monitoring it regularly (e.g., monthly or quarterly).	<input type="checkbox"/>				
Total number of each ranking	<input type="checkbox"/>				
	x1	x2	x3	x4	x5
Multiply by the number above	<input type="checkbox"/>				

Add all five numbers to determine the percentage score that reflects the current state of your company:

%