

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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Our core values are clear, and we are hiring, reviewing, rewarding, and firing around them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Our 3 Uniques™ (differentiators) are clear, and all of our marketing and sales efforts communicate them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Our Accountability Chart™ (organizational chart that includes roles/responsibilities) is clear, complete, and constantly updated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Our leadership team is open and honest, and demonstrates a high level of trust.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ORGANIZATIONAL CHECKUP™

	1	2	3	4	5
12. Everyone has Rocks (1 to 7 priorities per quarter) and is focused on them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Everyone is engaged in a regular Meeting Pulse™ (weekly, quarterly, annually).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. All teams clearly identify, discuss, and solve issues for the long-term greater good of the company.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Our Core Processes are documented, simplified, and followed by all to consistently produce the results we want.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. A Scorecard for tracking weekly metrics/measurables is in place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. We have a budget and are monitoring it regularly (e.g., monthly or quarterly).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total number of each ranking

x1 x2 x3 x4 x5

Multiply by the number above

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

%