



**What direction is your company moving in?
Do you have the optimal road map?
Does everyone in the company have the same map?**

This short sample organizational assessment is provided by Catalytic Management to help uncover where you are and where you may need to make course corrections. Our formal assessments are in-depth examinations of your people, structures, processes and policies. Such an assessment involves staff interviews, documentation reviews, process mapping and when appropriate skills testing. Performance improvement is not static – it is a continual process practiced by successful companies like yours. Don't wait until you experience real pain! Improving a successful company is how you remain the market leader!

Organizational Assessment Directions

Please read each statement carefully and with your organization in mind, place the number in the left column that best fits with your level of agreement with each statement.

Scale:

Disagree					Agree
1	2	3	4	5	

Financial Focus

- _____ The organization's financial performance measures are consistent with today's business realities and include intangible asset values
- _____ The organization's financial focus does not sacrifice long term gains in favor of short term fixes
- _____ Budgeting is not isolated and is directly linked to and in support of the organization's strategic initiatives
- _____ The organization's financial metrics are derived as a direct translation of the company's strategy
- _____ The organization regularly shares financial results with employees
- _____ Middle managers have dashboard from which to manage budgets, results and forecasts

Strategy Alignment

- _____ Your organization has clear strategic plan that is shared throughout the company
- _____ Your employees clearly understand the organization's strategy and business goals and act in support of the strategy and goals
- _____ Decisions throughout the organization from line staff to senior management are based on how they align with and support the organization's strategy



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- _____ The organization's strategy is supported in all areas of the company including budgeting, resource allocation, capital spending, sales/marketing, performance measure and compensation
- _____ The organization's strategy and mission is understood by all current employees and included in new hire orientation

Internal Operations/Processes

- _____ As an organization, we are focused on the key processes where we must excel in order to continue adding value to our customers
- _____ Your organization utilizes specific performance objectives to measure results against targets
- _____ Performance measures include both "lag" indicators (consequences of previous actions such as sales, market share) and "lead" indicators
- _____ Standards for measuring operational performance are clear, consistent and include a defined process for adjustment due to changes in operation
- _____ Processes are documented and available to the entire company
- _____ Departments work effectively across department lines
- _____ Handoffs between departments are timely, accurate and in support of each others needs and goals
- _____ Your organization regularly evaluates the effectiveness of your processes
- _____ Your organization has a documented and structured approach to process improvement
- _____ Your organization practices continuous improvement

Sales /Marketing

- _____ You have a stable, trained and productive sales team
- _____ Individuals in your sales organization possess excellent selling skills
- _____ Your sales professionals actively pursue innovative solutions for developing new business
- _____ Year to year revenue per client is strong and growing
- _____ Your revenue growth rate meets or exceeds industry growth rates
- _____ Sales and marketing work closely to support revenue and margin targets
- _____ You have a defined sales process supported by marketing efforts



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- _____ Individual sales professionals maintain client data profiles, follow-up logs, and input critical data into client database
- _____ Your organization has invested in client management technology that will track customer relationships and marketing campaigns

The Customer

- _____ The organization's value proposition is well defined and understood by your customers and your employees
- _____ Your company's processes, procedures and policies were developed to meet customer needs and make it easy for customers to do business with you
- _____ Your organization consistently seeks and acts upon input from customers
- _____ Your organization understands and acts upon the knowledge of the difference between "customer focused" and "customer driven"
- _____ Customer intimacy is viewed as a strategic tool and is supported by leading edge technology
- _____ Customer feedback and input are core components of all product and service evaluations
- _____ Your organization has a formal service recovery process that is understood and supported throughout the company

Is your organization moving in the desired direction?

The key to the sample assessment is below. Add up your total responses to determine your organization's score.

- 143-55 Congratulations! Your organization is highly effective in all performance areas
- 118-142 Good job. You have probably experienced real success. Implementing a continuous improvement culture will move the organization to the top.
- 93-117 Performance improvement is recommended.
- 0-92 Problems exist within your organization. A complete organizational assessment and performance improvement plan is advisable.

Thank you for visiting Catalytic Management's website. We hope you found this tool useful in uncovering your strengths and challenges. If you would like to discuss your findings and how Catalytic Management can help you address your challenges and drive revenue, please contact us at:

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