

Organizational Self Assessment

A Company Report Card



The **Organizational Self Assessment** is intended as a diagnostic tool—a first step in strengthening and optimizing your company’s performance. Using the self-assessment, you can quickly gauge your company’s effectiveness in crucial organizational areas. While the assessment cannot tell you why a certain condition exists or exactly what to do about it, it can serve as a valuable outline for organizational improvement. Used as an annual report card, it can also help benchmark your organization’s progress.

The self assessment measures **eight key areas** of organizational performance, five of which are identified as **critical**. These five “cultural sub-scales” were identified by Dr. Talcott Parsons, a Harvard sociologist. Dr. Parsons and others argued that all organizations must carry out certain crucial functions to be sustainable: *managing change, achieving goals, coordinating teamwork, building a strong culture, and customer orientation*. Each of the five critical functions are supported (or hampered) by the values and beliefs shared by the organization’s members. These values and beliefs are powerful forces for organizational effectiveness – or for organizational failure.

Using the questions below, self-score your company on the following criteria.

I. Financial Performance and Business History (Achieving Goals)

(circle a point value)

Did your annual sales increase for 2005-2006?	0	1			
Did your sales increase by 5% or more?	0	1			
Do you have a clear statement of company goals?	0	1			
Do you have a clear statement of company core values?	0	1			
Do you overcome business obstacles in an intentional and thoughtful manner?	0	1	2		
Do you have a compelling business history?	0	1	2	3	4

Scores: 9-10 = A, 7-8 = B, 5-6 = C, Below 5 = Needs Work

Sub-Scale Total: /10

Add your circled points to determine your sub-scale total.

II. Staff Training and Motivation (Teamwork)

(circle a point value)

Do you conduct specific team building activities (retreats, company activities, etc.)	0	1			
Do you foster internal recruitment and advancement?	0	1			
Do you have an internal communication plan?	0	1			
What employee benefits do you offer? (one point for each, 5 points max) (i.e. health plan, paid vacation, sick/personal days, retirement/401(k), education allowance/tuition reimbursement, employee bonuses, employee rewards)	0	1	2	3	4 5
Do you provide internal training opportunities?	0	1			
Do you have an innovative approach to retaining employees?	0	1			
Does your company demonstrate a strong desire to build a rewarding environment?	0	1			
Do your employees like working for the company?	0	1	2		

Scores: 11-13 = A, 8-10 = B, 6-7 = C, Below 6 = Needs Work

Sub-Scale Total: /13

Add your circled points to determine your sub-scale total.

III. Community Involvement

(circle a point value)

Is your company involved in local community activities?	0	1	2
Does your company encourage employees to participate in community activities outside of work?	0	1	
Does your company make charitable donations?	0	1	2
Does your company help organize community events?	0	1	2
Is your company an active corporate citizen?	0	1	2 3

Scores: 9-10 = A, 7-8 = B, 5-6 = C, Below 5 = Needs Work

Sub-Scale Total: /10

Add your circled points to determine your sub-scale total.

IV. Customer Service (Customer Orientation)

(circle a point value)

Does your company have a clear understanding of its primary customers?	0	1	
Does your business make a company-wide commitment to customers? (two points for exceptional and pervasive commitment)	0	1	2
Does your company make a strong effort to have its customer service stand out?	0	1	
Does your company have a system for routinely measuring customer satisfaction? (two points for exceptional)	0	1	2
Does your company take active steps to retain customers?	0	1	
Does your company conduct customer research?	0	1	
Has your company identified strategies and/or specific promotions to build its customer base?	0	1	2

Scores: 9-10 = A, 7-8 = B, 5-6 = C, Below 5 = Needs Work

Sub-Scale Total: /10

Add your circled points to determine your sub-scale total.

V. Business Plan, Strategies, and Goals

(circle a point value)

Does your company have a mission statement? (two points for a compelling statement)	0	1	2
Does your company have a written business plan?	0	1	
If your company has a business plan, does it include goals other than profitability?	0	1	
Does your company clearly identify strategies for future growth?	0	1	2
Does your company identify future risks and have a strategy to address them?	0	1	2
Does your company demonstrate leadership in its industry or have a plan to become an industry leader in the future?	0	1	2
Is your company aware of its position among competitors?	0	1	
Does your company connect goals with a process for achieving them?	0	1	
Is your business plan well organized?	0	1	
Has your business plan been updated within the last year?	0	1	
Does your company have specific financial projections for at least the next two years?	0	1	

Scores: 13-15 = A, 10-12 = B, 7-9 = C, Below 7 = Needs Work

Sub-Scale Total: /15

Add your circled points to determine your sub-scale total.

VI. Adaptability (Managing Change)

(circle a point value)

Has your company demonstrated that it can adapt to changing market conditions?	0	1		
Employees have a good attitude coping with conditions imposed by outside agencies (e.g., EPA, OSHA, SEC, etc.)	0	1		
When changes are necessary, the change is planned and everyone knows their role.	0	1		
Pressure to maintain the status quo does not stop major changes if they are required for your company to survive.	0	1		
Employees believe they can influence, control, or work positively with important factors and forces in their environment.	0	1		
Most of your company's senior staff are on their second or third career.	0	1		
Employees believe they can influence what happens in the company.	0	1	2	
Your company has successfully gone through a major change in product or market focus within the past two years. (two points for an extreme change)	0	1	2	

Scores: 9-10 = A, 7-8 = B, 5-6 = C, Below 5 = Needs Work

Sub-Scale Total: /10

Add your circled points to determine your sub-scale total.

VII. Strength of Culture (Culture)

(circle a point value)

Your company has developed a stable pattern of shared values, beliefs, and norms of behavior.	0	1	2	3		
Employees rely on one another to understand what is really happening and why.	0	1				
In your company, everyone is expected to support their views and positions with concrete facts.	0	1				
In your company, everyone believes in a set of shared basic values about how to work together to solve common problems and reach shared objectives.	0	1				
Your company respects a wide range of view points and cultural backgrounds and understands the benefits these bring to the company.	0	1	2	3		
Your company's senior leadership models company core values.	0	1	2	3		
Does your company's stated values match its actual values? (does the senior leadership actually "walk the talk"?)	0	1	2	3	4	5

Scores: 15-17 = A, 12-14 = B, 8-11 = C, Below 8 = Needs Work

Sub-Scale Total: /17

Add your circled points to determine your sub-scale total.

VIII. Company Standing

(circle a point value)

Does your company receive positive customer feedback or letters of recommendation? (two points for compelling letters)	0	1	2
Is your company a leader among businesses of a similar size/industry?	0	1	2
Has your company been mentioned positively in the media? (television, newspapers or magazines) (two points for an exceptional story)	0	1	2
Have current customers referred new business or made a presentation at a conference or trade show highlighting their use of your products or services?	0	1	
Has your company received an award in the last two years? (two points for an exceptional award)	0	1	2
Is your company regularly recognized for its accomplishments?	0	1	
Do you ever receive unsolicited offers to invest in or purchase the company?	0	1	
If your company were sold, would it sell for a premium over similar businesses?	0	1	2
Does your company make a difference through its products or through company activities?	0	1	2

Scores: 13-15 = A, 10-12 = B, 7-9 = C, Below 7 = Needs Work Sub-Scale Total: /15

Add your circled points to determine your sub-scale total.

Total your results from each sub-scale.

Grand Total: /100

Scores: 94-100 = A+, 86-93 = A, 85 – 78 = B, 77- 70 = C, Below 70 = Needs Work

Short answer questions:

What would your customers say is your company's greatest strength?

What would your customers say is your company's greatest weakness?

What is your company's greatest opportunity?

What is your company's greatest threat?

What one thing would you change about your company?
