



Finding the Heart of Organisational Issues



Purpose and Benefit

This benchmarking instrument is designed to help you determine where you are now as an organisation, the management of its people and the workplace.

We believe this will make it easier for you to draw up a strategic plan of action so as to achieve your organisational and workplace management ideals:

- a. The improvement of your organisation's competitiveness through improved productivity, quality and a cost-effective service.
- b. The development of a competent, committed and adaptable employee body.

This questionnaire was designed by AB Reynolds and adapted by Mario Denton. Copyright applies to the content of this questionnaire. This questionnaire may not be reproduced without the written permission of the authors.



Contents

Instructions	4
Biographical information	
1. Future Forces	
2. Customer Needs	
3. Competitive Analysis	
4. Benchmarking	
5. Organisation Realities	
6. Core Competencies	
7. Effective Leadership Team	
8. Individual Leaders	
9. Vision	
10. Mission	
11. Values	
12. Strategies	
13. Operational Plans	
14. Communication	
15. Process	
16. Structure	
17. Culture	
18. People - Staffing	
19. People - Performance Management	
20. People - Reward and Recognition	
21. Alignment	
Score Sheet	

Instructions

The objective of this survey is to determine how members of the organisation in which you work feel about various organisational processes.

There are no right or wrong answers to any of the items in this questionnaire. It is your opinion on each of the statements that matters.

This questionnaire contains a number of statements about the organisation in which you work. You are requested to respond to each of the statements by putting a cross in the space which most accurately fits the extent to which you agree that the statement describes the organisation in which you work.

After you have read each statement, please decide the degree to which the statement accurately describes your own situation and your own feelings, using the following scale:

1. Completely disagree (CD)
2. Mostly disagree (MD)
3. Slightly disagree (SD)
4. Undecided (U)
5. Slightly agree (SA)
6. Mostly agree (MA)
7. Completely agree (CA)

Example:

	1 CD	2 M D	3 SD	4 U	5 SA	6 M A	7 C A
1. Managers in this organisation really care about employees.							

If you completely agree with this statement you would put an X under 7. If, on the other hand, you slightly disagree with the statement, you would put an X under 3, and so on.

Please read each of the statements carefully and then put a cross in the space that most accurately describes how you see the situation in your organisation.

1. Future forces (FF)

Trends and emerging business conditions that will affect the business and may reflect changes in customer demands, employee needs, technology, the political environment, social trends, financial pressures, legal pressures and shifts in the market-place.

	1	2	3	4	5	6	7
1. We have a list of the primary future trends that we are researching in relation to our business.	1	2	3	4	5	6	7
2. The rate of change in our industry is known to us.	1	2	3	4	5	6	7
3. We know the factors that drive the change (e.g. technology, new alliances and mergers, customer demands).	1	2	3	4	5	6	7
4. We know what kinds of changes in the industry are likely to affect our business (e.g. products and services, market share, market segments, selling proposition, target customers, pricing, distribution, technology). How. Why. When.	1	2	3	4	5	6	7
5. We are confident that we understand the changing environment well enough to make changes in our organisation.	1	2	3	4	5	6	7
6. We know what methods to use to scan the future.	1	2	3	4	5	6	7
7. We know what the business opportunities in the future are.	1	2	3	4	5	6	7

8. The future forces were researched thoroughly when we developed our approach for the future.	1	2	3	4	5	6	7
9. We know what the strongest forces affecting our organisation are. How. Why. When.	1	2	3	4	5	6	7
10. We know how to keep these forces in the forefront of our thinking when making decisions.	1	2	3	4	5	6	7
11. All employees understand what the future shifts are likely to be.	1	2	3	4	5	6	7
12. Employees had an opportunity to give input on how the shifts could take place most effectively (e.g. timing, methods, resources needed, specifics of the plan).	1	2	3	4	5	6	7
13. We keep the future in mind when making decisions today.	1	2	3	4	5	6	7
14. Our future research has pointed us in the right direction to maintain/increase our success.	1	2	3	4	5	6	7
15. We have become future-oriented in our thinking.	1	2	3	4	5	6	7
16. Future research "best practices" are identified so that they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

2. Customer needs (CN)

An analysis of the customers' needs that include current demands and expectations, knowledge of how the customers' business is changing and a clear picture of how the customers' business (and the demands of its customers) are likely to change in the future.

17. Our organisation communicates with our customers to understand their current and future needs.	1	2	3	4	5	6	7
18. We know who our customers are and how they are changing their business and why, and when.	1	2	3	4	5	6	7
19. We know what emerging needs have been identified as well as what current needs change or cease to exist.	1	2	3	4	5	6	7
20. We know what kind of relationship with our customers will be essential in the future (e.g. preferred supplier list, single supplier, partner, take on some of the customer's work, form an alliance, etc.).	1	2	3	4	5	6	7

21. We know what our customers' new requirements for products and services are.	1	2	3	4	5	6	7
22. We know what our customers think about our organisation (re: quality, speed, dependability, ease of doing business, farsightedness, understanding of their needs, ability to solve future problems for them, its products, its services, the relationship with them, their role in the future).	1	2	3	4	5	6	7
23. Our plans of action have been shared with our customers to get input.	1	2	3	4	5	6	7
24. Employees at all levels interact with customers and know their needs.	1	2	3	4	5	6	7
25. We know how the customers' needs have shaped the changes we plan to make (e.g. contact, legal relationship, informal relationship, products/services, distribution, pricing, systems, etc.).	1	2	3	4	5	6	7
26. Customers' current and future needs are kept in the forefront of our thinking when making decisions (e.g. daily process, process shifts, resource usage, production plan, systems, improvements, packaging, etc.).	1	2	3	4	5	6	7
27. Employees have contact with customers frequently so they can ask more detailed questions about their needs.	1	2	3	4	5	6	7
28. Customers can observe production or other processes and make suggestions.	1	2	3	4	5	6	7
29. There are methods in place to solve problems immediately or make adjustments to the overall approach.	1	2	3	4	5	6	7
30. Our efforts meet the customers' requirements	1	2	3	4	5	6	7
31. The changes we have made are accepted by our customers to maintain/increase our sales and solidify the relationship.	1	2	3	4	5	6	7
32. Our organisation is customer-knowledgeable and- oriented so it shifts naturally to meet customer needs.	1	2	3	4	5	6	7
33. Customer needs "best practices" are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

3. Competitor analysis (CA)

A survey of competitors' current products, processes, services and technology and knowledge of their plans and potential in the future.

	1 CD	2 MD	3 SD	4 U	5 SA	6 MA	7 CA
34. Our knowledge of our competitors' business and plans is current and deep.	1	2	3	4	5	6	7
35. We know who our competitors are and how, why and when they are changing their businesses.	1	2	3	4	5	6	7
36. We know how changes that competitors make affect our business (e.g. market share, position in the market-place, obsolescence, etc.).	1	2	3	4	5	6	7
37. What we know are the opportunities that our competitors are ignoring or cannot do as well as our organisation.	1	2	3	4	5	6	7
38. We thoroughly researched our competitors' business plans when we designed our new approach.	1	2	3	4	5	6	7
39. We know what specific parts of our approach plan will counteract our competitors or move ahead of them.	1	2	3	4	5	6	7
40. Employees at all levels have knowledge of our competitors and understand our organisation's position in the market-place.	1	2	3	4	5	6	7
41. Competitors' plans are kept in the forefront of our thinking when making implementation decisions (e.g. production schedule, customer contact, sales and marketing approaches, sense of urgency, etc.).	1	2	3	4	5	6	7
42. We have a method to get continuous information about how and what our competitors are doing and that information is shared.	1	2	3	4	5	6	7
43. The changes that have been made allowed us to meet or beat the efforts of our competitors.	1	2	3	4	5	6	7
44. Our organisation is competitive and market-place knowledgeable so it can shift naturally as competitors shift their strategies.	1	2	3	4	5	6	7
45. We know what the competitor analyses "best practices" are that can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

4. Benchmarking (Be)

The study of business methods and innovations of related and unrelated organisations to discover effective business practices.

	1 CD	2 MD	3 SD	4 U	5 SA	6 MA	7 CA
46. Thorough benchmarking studies have been completed about related and unrelated organisations to provide methods and practices to consider.	1	2	3	4	5	6	7
47. We know what organisations are good sources of benchmarking information in related and unrelated markets/industries (i.e. are of the same business type such as retail or manufacturing, are making real advances, are using new technology, have a "winning attitude," have experience in areas we'll face soon, etc.).	1	2	3	4	5	6	7
48. Employees are well informed about alternative ways to do things based on the experience of others.	1	2	3	4	5	6	7
49. Employees interact with benchmarking organisations (e.g. field trips, interview teams, market observation, benchmarking sessions, etc.).	1	2	3	4	5	6	7
50. Various new methods have been adopted from our benchmarking efforts. We also know why and how this will help our organisations.	1	2	3	4	5	6	7
51. Employees are aware of the source of adopted ideas and they have had a chance to investigate them further for day-to-day activity planning.	1	2	3	4	5	6	7
52. Benchmarking keeps this information in the forefront of our thinking when making day-to-day decisions.	1	2	3	4	5	6	7
53. Employees have done thorough process mapping to fully understand adopted approaches.	1	2	3	4	5	6	7

54. Employees improve on the adopted approaches as they adapt them to their situation.	1	2	3	4	5	6	7
55. Benchmarking efforts have paid off for our organisation in the adoption of new and better ways of doing things.	1	2	3	4	5	6	7
56. Our organisation is actively alert and open to finding new and better ways of doing things.	1	2	3	4	5	6	7
57. "Best practices" about specific benchmarking efforts or benchmarking in general so that they can be remembered and shared with others, are identified.	1	2	3	4	5	6	7

Comments

5. Organisation realities (Or)

Organisation realities are the key constraints and parameters of the organisation that influence its future, including financial, geographic, technological, resources and legal and other fundamental issues.

	1 CD	2 MD	3 SD	4 U	5 SA	6 MA	7 CA
58. We have thoroughly examined our list of organisational realities (i.e. budget parameters, capabilities of employees, access to the market-place, etc.) to be sure they truly do shape our business (that they aren't simply psychological constraints or common practice that could be changed).	1	2	3	4	5	6	7
59. We know what elements of the organisation's history act as constraints or direction setters.	1	2	3	4	5	6	7
60. We know what elements required for future success clash with current constraints.	1	2	3	4	5	6	7
61. We know the "enablers" in the organisation's past or resources that will support success.	1	2	3	4	5	6	7

62. Our organisation's plan of action takes advantage of the strengths and finds ways to address the weaknesses.	1	2	3	4	5	6	7
63. Employees understand very well the limits realities place on the decisions that can be/have been made.	1	2	3	4	5	6	7
64. We know what the areas are that will take major (or minor) effort to upgrade or renew (i.e. infusion of capital, drop some product lines, streamline process, refocus on new product development, upgrade technology, etc.).	1	2	3	4	5	6	7
65. Organisational realities are kept in the forefront of our thinking when making decisions.	1	2	3	4	5	6	7
66. Training is provided so employees develop the necessary new skills. The training is effective and fast.	1	2	3	4	5	6	7
67. Employees are encouraged and supported to address the constraints with creativity and ingenuity.	1	2	3	4	5	6	7
68. Employees are responsible for adjusting processes to meet goals and overcome constraints.	1	2	3	4	5	6	7
69. Impossible goals and methods have been avoided through practical decision-making.	1	2	3	4	5	6	7
70. All members focused on goals, mindful of realities and creative in finding solutions.	1	2	3	4	5	6	7
71. "Best practices" regarding organisational realities are identified so that they can be remembered or shared.	1	2	3	4	5	6	7

Comments



6. Core competencies (CC)

The essential knowledge base, technologies or processes that lie at the heart of the organisation's current business offerings.

	1 CD	2 MD	3 SD	4 U	5 SA	6 MA	7 CA
72. The core competencies that our organisation has to offer have been identified.	1	2	3	4	5	6	7
73. We know what the specific elements of each core competency are that make them unique to our organisation or a particular strength of our organisation.	1	2	3	4	5	6	7
74. We have explored the future applications and potential of these core competencies.	1	2	3	4	5	6	7
75. We know in what form these core competencies will be successful in the future.	1	2	3	4	5	6	7
76. We know what the capacity of our organisation is to continually evaluate our core competencies.	1	2	3	4	5	6	7
77. We know which core competencies our organisation will rely on in the future and what form they will take.	1	2	3	4	5	6	7
78. We know what kinds of activity will have to take place to ensure the continued success of the core competencies (i.e. research, new technology development, adding new elements or applications, etc.).	1	2	3	4	5	6	7
79. We know what kind of shift will have to take place in the way we think, approach our customers or conduct our business.	1	2	3	4	5	6	7
80. We know what new core competencies (or applications of them) must be developed.	1	2	3	4	5	6	7
81. Employees understand how to refocus their efforts and thinking regarding core competencies.	1	2	3	4	5	6	7
82. Employees have the opportunity to explore possibilities and make suggestions for core competency development.	1	2	3	4	5	6	7
83. Employees had the opportunity to offer suggestions for ways to shift processes to enhance the core competencies.	1	2	3	4	5	6	7
84. Educational and training efforts have been focused on making everyone smarter about core competencies.	1	2	3	4	5	6	7

85. The core competencies have been strengthened.	1	2	3	4	5	6	7
86. Employees are actively interested and engaged in finding applications for the core competencies.	1	2	3	4	5	6	7
87. "Best practices" regarding core competency strengthening are identified and should be remembered or shared.	1	2	3	4	5	6	7

Comments

7. Effective leadership team (ET)

The level of skill exhibited by the leadership team as it assesses the market-place sets the direction of the organisation, shapes the organisation to be most effective, models the values and desired culture and works as an effective team in guiding the organisation.

	1 CD	2 M D	3 SD	4 U	5 SA	6 MA	7 CA
88. The leadership team has evolved into an effective team that shapes the organisation and its processes.	1	2	3	4	5	6	7
89. The team has developed meeting, decision-making and problem-solving processes that help them be efficient.	1	2	3	4	5	6	7
90. Leaders are open and honest with each other, without hidden agendas and political manoeuvring.	1	2	3	4	5	6	7
91. The leadership team has developed skill in interacting with each other and is able to deal with difficult issues and conflicts.	1	2	3	4	5	6	7
92. Leadership team members appreciate and use each other's experience, talents and perceptions.	1	2	3	4	5	6	7
93. The leadership team has reached an informed	1	2	3	4	5	6	7

consensus on a course of action for the organisation.							
94. The leadership team has defined its role and responsibilities in making sure the course of action is correct and will be implemented.	1	2	3	4	5	6	7
95. The leadership team has developed an understandable plan of action.	1	2	3	4	5	6	7
96. The leadership team is united in effort and committed to success.	1	2	3	4	5	6	7
97. The leadership team seeks and considers input from employees and others when formulating a plan of action.	1	2	3	4	5	6	7
98. The leadership team consistently and persistently demands implementation of plans.	1	2	3	4	5	6	7
99. The leadership team has selected for key roles people who are respected and capable.	1	2	3	4	5	6	7
100. The leadership team has provided the necessary resources (i.e. time, money, people, tools, etc.).	1	2	3	4	5	6	7
101. The leadership team has set the standards and measures that must be met.	1	2	3	4	5	6	7
102. The leadership team has empowered employees to carry out their assigned tasks.	1	2	3	4	5	6	7
103. The leadership team collects the right progress information and focuses resources to solve problems.	1	2	3	4	5	6	7
104. The leadership team supports creativity and innovation in the way things are done.	1	2	3	4	5	6	7
105. The leadership team performs in a way that instils confidence in employees about the future.	1	2	3	4	5	6	7
106. The leadership team "walks its talk".	1	2	3	4	5	6	7
107. The leadership team has selected a winning plan of action for the organisation.	1	2	3	4	5	6	7
108. Leadership team "best practices" have been identified to be remembered and shared with others.	1	2	3	4	5	6	7

Comments

8. Individual leaders (IL)

The leadership capacity of key individuals in the organisation.

	1 CD	2 M D	3 SD	4 U	5 SA	6 MA	7 CA
109. Individual leaders have assessed their strengths, weaknesses, interests and preferences as leaders.	1	2	3	4	5	6	7
110. Individual leaders are actively learning about the organisation's business situation and environment.	1	2	3	4	5	6	7
111. Individual leaders focus on the organisation's success or their own.	1	2	3	4	5	6	7
112. Individual leaders are shifting their own ways of doing things as business conditions change.	1	2	3	4	5	6	7
113. Individual leaders assess the business conditions with an open mind and with a view to the future.	1	2	3	4	5	6	7
114. Individual leaders understand the changing customer requirements and make decisions based on them.	1	2	3	4	5	6	7
115. Individual leaders solicit input from internal and external people before they make up their minds.	1	2	3	4	5	6	7
116. Individual leaders consider a range of alternatives and scenarios as a step in creating plans of action.	1	2	3	4	5	6	7
117. Individual leaders are skilful planners.	1	2	3	4	5	6	7
118. Individual leaders resist interfering in the tasks others have been allocated.	1	2	3	4	5	6	7
119. Individual leaders provide useful, on-target advice when asked.	1	2	3	4	5	6	7
120. Individual leaders are willing to step in when progress is off-target or when employee performance is poor.	1	2	3	4	5	6	7
121. Individual leaders are interested and accessible and focus on successful implementation.	1	2	3	4	5	6	7
122. Individual leaders are willing to hear "bad news", without blaming and punishing the messenger.	1	2	3	4	5	6	7
123. Individual leaders provide the necessary resources in a timely manner.	1	2	3	4	5	6	7
124. Individual leaders adjust when necessary to	1	2	3	4	5	6	7

changing conditions or ineffective strategies.							
125. Individual leaders inspire commitment and success of employees.	1	2	3	4	5	6	7
126. Individual leaders build an environment where trust and innovation happen.	1	2	3	4	5	6	7
127. Individual leaders get results.	1	2	3	4	5	6	7
128. Leadership "best practices" are identified so that they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

9. Vision (Vi)

A narrative description of the organisation at a selected future date and which includes the customer base, the products and services offered, overall competitive strategy, the technologies used, the culture desired and the reputation that the organisation has achieved.

	1 CD	2 M D	3 SD	4 U	5 SA	6 MA	7 CA
129. We know what information has been included in the vision statement (i.e. customer, competitor, market-place, core competencies).	1	2	3	4	5	6	7
130. The vision statement does project at least 3 years into the future based on a careful future forces analysis.	1	2	3	4	5	6	7
131. The vision statement is complete (i.e. a description of the desired future state, the customers to be served, the product/service selection desired, position in the market-place, a description of the culture that will get the company there).	1	2	3	4	5	6	7
132. There is full agreement about the vision among the leaders in the organisation.	1	2	3	4	5	6	7
133. Employees understand and buy into the vision.	1	2	3	4	5	6	7

134. We know what the major gaps are between the present situation and the vision.	1	2	3	4	5	6	7
135. Employees have the opportunity to provide input regarding the vision.	1	2	3	4	5	6	7
136. Employees have opportunities to ask questions and hear details about the vision.	1	2	3	4	5	6	7
137. The vision defines the business broadly enough.	1	2	3	4	5	6	7
138. The opportunities that will be pursued are clearly defined.	1	2	3	4	5	6	7
139. The vision is very well reinforced as the direction the organisation will take.	1	2	3	4	5	6	7
140. There is a set process in place that causes continuous reference to and discussion of the vision.	1	2	3	4	5	6	7
141. We know what kind of information is provided about details of the vision to educate employees.	1	2	3	4	5	6	7
142. Each employee is encouraged to link his or her personal and professional vision to the organisation vision.	1	2	3	4	5	6	7
143. The vision statement gives employees a clear sense of direction.	1	2	3	4	5	6	7
144. Employees are inspired by the vision because it is challenging, achievable and worthwhile.	1	2	3	4	5	6	7
145. Employees see how they can contribute to and benefit personally from committing to the vision.	1	2	3	4	5	6	7
146. "Best practices" regarding the development and use of a vision are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

10. Mission (Mi)

A short statement that defines how the organisation wants to be known, including its product/service arena, the highest level goals (market share, profit level, etc.) to be achieved and the overall competitive strategy, and effectively incorporates the realities of the current and future business environment, the vision and the core values.

	1 CD	2 M D	3 SD	4 U	5 SA	6 M A	7 CA
147. Our mission statement meets the criteria of a good mission statement (i.e. brief, concise, states goal and means).	1	2	3	4	5	6	7
148. The employees would say the direction of the organisation is very clear.	1	2	3	4	5	6	7
149. Our mission statement provides immediate clarity about the organisation's direction and links clearly with the vision statement.	1	2	3	4	5	6	7
150. Mission statements are created by each work group and communicated to others.	1	2	3	4	5	6	7
151. We are confident that any employee could tell you the mission of the organisation.	1	2	3	4	5	6	7
152. The mission statement is consistently and frequently communicated.	1	2	3	4	5	6	7
153. The mission statement consistently guides our decisions and the employees' decisions.	1	2	3	4	5	6	7
154. The resources of the organisation are directly allocated to achieve the mission.	1	2	3	4	5	6	7
155. Every employee is able to tell you the mission of the organisation and their unit.	1	2	3	4	5	6	7
156. More focused decisions are made based on achieving the mission.	1	2	3	4	5	6	7
157. Employees (at all levels) feel a real sense of accomplishment as the mission is being achieved.	1	2	3	4	5	6	7
158. "Best practices" regarding the development and use of a mission are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7



Comments

11. Values (Va)

Essential beliefs that guide the behaviour of employees at all levels as they make decisions and interact with customers, suppliers, competitors and each other.

	1 CD	2 MD	3 SD	4 U	5 SA	6 M A	7 CA
159. There is a set of values that lies at the heart of the way the organisation wants to do business.	1	2	3	4	5	6	7
160. Values are written specifically enough so that people understand what individual behaviours are expected.	1	2	3	4	5	6	7
161. Employees believe that the leadership is truly committed to "living" and "ensuring these values live" in the company.	1	2	3	4	5	6	7
162. The process used for defining the key values was complete (i.e. historical preferences, customer input, market-place reputation, owner's wishes, environment, safety and community benefit, etc.).	1	2	3	4	5	6	7
163. Employees have an opportunity to give input about the values that are essential for a productive workplace.	1	2	3	4	5	6	7
164. Employees believe that the values really have meaning.	1	2	3	4	5	6	7
165. The values reflect ethical behaviour and good business practices.	1	2	3	4	5	6	7
166. The leadership team does well in "living" these values in their personal interactions and the decisions they make.	1	2	3	4	5	6	7
167. The organisation's interactions with customers, suppliers, partners and others reflect the values.	1	2	3	4	5	6	7
168. Internal organisation policies, programme and procedures are aligned with the values.	1	2	3	4	5	6	7
169. Employees' performances are rated lower because of behaviours inconsistent with the values.	1	2	3	4	5	6	7

170. Employees are productive and proud.	1	2	3	4	5	6	7
171. The organisation's reputation, community benefit and ethical practice are very high.	1	2	3	4	5	6	7
172. Values-based business "best practices" are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

12. Strategy (St)

Key approaches that will be used by specific functions in the organisation (manufacturing, marketing, distribution, sales, administrative) to fulfil the vision, values and mission.

	1 CD	2 M D	3 SD	4 U	5 SA	6 M A	7 CA
173. Our strategies evolved from the gap between our current business practices and practices necessary to respond to the market-place, our customers and our core competencies.	1	2	3	4	5	6	7
174. Our organisation has identified several key strategies that, when focused on, will ensure that we accomplish our vision and maintain/increase our success.	1	2	3	4	5	6	7
175. The selected strategies have been thoroughly researched and discussed.	1	2	3	4	5	6	7
176. Measures and standards are identified for each strategy to guide implementation.	1	2	3	4	5	6	7
177. Employees have an opportunity to provide input on the selection of the strategies.	1	2	3	4	5	6	7
178. Employees understand the purpose and specifics of the strategies so they can make appropriate decisions.	1	2	3	4	5	6	7
179. Strategies guide decisions that are made about plans and resource allocations.	1	2	3	4	5	6	7

180. The measures and standards are the right ones to guide day-to-day behaviours and reach long-term financial success (i.e. the margin between cost of capital and its return, a balanced scorecard).	1	2	3	4	5	6	7
181. There is agreement among the leaders that our strategies will lead to success.	1	2	3	4	5	6	7
182. The strategies are on target, aggressive and imaginative enough to "win".	1	2	3	4	5	6	7
183. The roles and responsibilities for strategy implementation are clear (i.e. sponsors, process owners, key work units or people, customers, suppliers).	1	2	3	4	5	6	7
184. Pricing decisions reflect what the market will bear.	1	2	3	4	5	6	7
185. The strategies are fully discussed by work units to understand what parts will be their responsibility.	1	2	3	4	5	6	7
186. Employees understand that the strategies are the "work" of the organisation and that inconsistent or irrelevant activities should be stopped.	1	2	3	4	5	6	7
187. Frequent monitoring of the measures and standards provide insight into the progress being made.	1	2	3	4	5	6	7
188. Employees give frequent feedback about suggestions regarding the strategies.	1	2	3	4	5	6	7
189. Employees make day-to-day decisions based on the strategies.	1	2	3	4	5	6	7
190. The strategies are the right ones to respond to our market-place challenges.	1	2	3	4	5	6	7
191. The strategies guide the actions of all employees and work units.	1	2	3	4	5	6	7
192. Various "best practices" regarding using strategies are identified so that they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

13. Operational planning (OP)

The development of specific objectives, activities and time lines for all structural units within the organisation or division and which support the strategies and critical goals.

	1 CD	2 M D	3 SD	4 U	5 SA	6 MA	7 CA
193. Our organisation's strategies get implemented.	1	2	3	4	5	6	7
194. Processes and work assignments shifted to match new strategies.	1	2	3	4	5	6	7
195. Our organisation's strategies guide the work of every work unit and individual.	1	2	3	4	5	6	7
196. A cascading planning process has been implemented that thoroughly links each work unit with the strategies and critical goals.	1	2	3	4	5	6	7
197. Authority and accountability are clearly defined for the accomplishment of critical goals and objectives.	1	2	3	4	5	6	7
198. Employees are deeply involved in the goal-setting process for their work unit.	1	2	3	4	5	6	7
199. Each employee develops a personal set of objectives that link him/her to the work unit and the overall strategies.	1	2	3	4	5	6	7
200. The leaders organise very well all activities of their work units based on the specific plan of the unit.	1	2	3	4	5	6	7
201. Employees understand very well that their objectives are the "work" of the work unit.	1	2	3	4	5	6	7
202. Effective project management or monitoring processes and tools are used to measure and discuss progress.	1	2	3	4	5	6	7
203. Employees use their expertise and creativity to find the best ways to achieve their objectives.	1	2	3	4	5	6	7
204. Essential training is identified and provided.	1	2	3	4	5	6	7
205. Leaders keep their focus on and energy directed at the objectives/goals/strategies and allocate needed resources to achieve them.	1	2	3	4	5	6	7
206. The employees' efforts are directed at the most important priorities of the company.	1	2	3	4	5	6	7
207. Employees have a sense of direction and contribution. They are committed and energized.	1	2	3	4	5	6	7
208. "Best practices" about planning and follow-through are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

14. Communication (Co)

The development of specific vehicles to educate, inform and involve employees.

	1 CD	2 MD	3 SD	4 U	5 SA	6 M A	7 CA
209. A communication plan has been created to ensure that employees are fully informed about the business, its challenges, the strategies and progress towards the strategies.	1	2	3	4	5	6	7
210. A variety of formal and informal communication vehicles are used (i.e. presentations, written pieces, newsletters, bulletins, e-mail messages).	1	2	3	4	5	6	7
211. Two-way communication vehicles and processes are used to collect ongoing ideas and information from employees.	1	2	3	4	5	6	7
212. Employees trust the credibility and completeness of the information they receive.	1	2	3	4	5	6	7
213. The communication plan uses a variety of vehicles and its purpose is to inform and involve employees.	1	2	3	4	5	6	7
214. Our organisation communicates in a way that makes changes or plans clear and defined for each level of the organisation.	1	2	3	4	5	6	7
215. The communication efforts consistently link back to the business environment, the vision and strategies of the company.	1	2	3	4	5	6	7
216. The communications recognise and address the various mindsets, concerns and questions that people have.	1	2	3	4	5	6	7
217. Vehicles and an environment have been created so that employees are willing to raise concerns and questions.	1	2	3	4	5	6	7

218. Information is provided at a very specific level to fully inform employees.	1	2	3	4	5	6	7
219. Group sessions are used to get ideas and solutions, raise issues, and interpret data so interactive communication can take place.	1	2	3	4	5	6	7
220. Employees who raise questions and concerns are valued and taken seriously.	1	2	3	4	5	6	7
221. The communication flow is quick and accurate.	1	2	3	4	5	6	7
222. The quality of day-to-day decisions made by leaders and employees has been improved because of the availability of more and more complete information.	1	2	3	4	5	6	7
223. Employees feel like valued contributors.	1	2	3	4	5	6	7
224. Communication "best practices" are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

15. Process (Pi)

The processes selected to facilitate the achievement of the strategies and critical goals, including information, administrative, decision-making, customer service and other systems and processes.

	1 CD	2 M D	3 SD	4 U	5 SA	6 M A	7 CA
225. Our organisation has identified the key processes essential for succeeding with the strategies of our business.	1	2	3	4	5	6	7
226. Our leaders and employees understand that the organisation is a "system" for customer needs through customer service.	1	2	3	4	5	6	7
227. All discussions about process begin with the customers' perceptions about product and service quality.	1	2	3	4	5	6	7

228. Our organisation has implemented process improvement efforts to manage costs and increase quality and productivity.	1	2	3	4	5	6	7
229. The current business technologies (i.e. communication, data collection and monitoring, customer information systems) have been evaluated for their effectiveness.	1	2	3	4	5	6	7
230. The thinking has been complete in selecting the various systems and processes to ensure they support the strategies and critical goals.	1	2	3	4	5	6	7
231. The selected systems and processes address the total business (i.e. customer needs to customer service, input-output flows, cross-functional) coordination needs.	1	2	3	4	5	6	7
232. Selected business technologies (i.e. communication, data collection and monitoring, customer information systems) been have analysed for training, equipment, installation and transition costs and requirements.	1	2	3	4	5	6	7
233. The process changes that have been selected make the work simpler.	1	2	3	4	5	6	7
234. A process has been implemented that causes the continuous improvement of the selected systems.	1	2	3	4	5	6	7
235. Employees are effective in implementing new systems and improving current ones.	1	2	3	4	5	6	7
236. The training, equipment, acquisition and installation process has been effective.	1	2	3	4	5	6	7
237. Employees are the primary source of improvement ideas and decisions.	1	2	3	4	5	6	7
238. Customers and suppliers are actively involved in process development and improvement efforts.	1	2	3	4	5	6	7
239. The leaders truly understand the importance of process development and improvement and provide the necessary resources.	1	2	3	4	5	6	7
240. Leaders and employees are evaluated on process improvement efforts and results.	1	2	3	4	5	6	7
241. Quality and productivity measures keep improving.	1	2	3	4	5	6	7
242. Employees feel as though they are making genuine business improvements.	1	2	3	4	5	6	7
243. Process "best practices" are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

16. Structure (St)

The arrangement of the people within the organisation or division to accomplish the strategies and critical goals, including choices about basic arrangements (function, product or process determined), reporting relationships and working units (team, work groups, individuals).

	1 CD	2 M D	3 SD	4 U	5 SA	6 M A	7 CA
244. Our organisation has analysed its structure to ensure it facilitates the achievement of the strategies and critical goals.	1	2	3	4	5	6	7
245. Our organisation has a clear rationale for its centralizing choices.	1	2	3	4	5	6	7
246. Teams are used in the right places and effectively enough.	1	2	3	4	5	6	7
247. The business structure does facilitate cross-functional or cross-unit coordination.	1	2	3	4	5	6	7
248. Our customers' needs have influenced the structure.	1	2	3	4	5	6	7
249. Business is getting done as quickly and accurately as our company wants.	1	2	3	4	5	6	7
250. Mergers and acquisitions work.	1	2	3	4	5	6	7
251. The selected structure facilitates the achievement of the strategies and critical goals.	1	2	3	4	5	6	7
252. The strategic expectations for different units are clear.	1	2	3	4	5	6	7
253. Job designs been created so they are flexible and linked directly to the strategies and process decisions.	1	2	3	4	5	6	7
254. Teams are selected for the right projects with clear charters.	1	2	3	4	5	6	7
255. The structural changes been made in a planned way (i.e. through linkage to strategy involvement of employees and the consideration of a variety of alternatives).	1	2	3	4	5	6	7

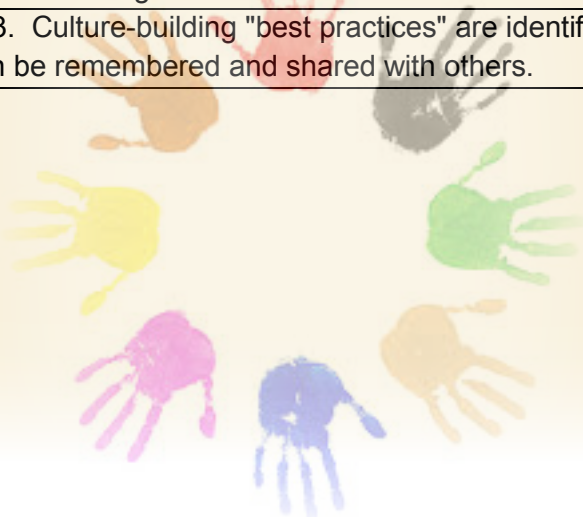
256. The formal structure is conducive to adapting to change.	1	2	3	4	5	6	7
257. The right number of layers has been selected to get things done.	1	2	3	4	5	6	7
258. Cutbacks in employment are based on sound business system reasoning.	1	2	3	4	5	6	7
259. Our structure plan changes as little as possible.	1	2	3	4	5	6	7
260. Employees do understand why the structure exists and they interact effectively.	1	2	3	4	5	6	7
261. Employees do work outside the structure when it is not adequate.	1	2	3	4	5	6	7
262. The structure does facilitate creativity, information sharing and process improvements.	1	2	3	4	5	6	7
263. Employees understand their job assignments and the level of authority, influence and responsibility they have.	1	2	3	4	5	6	7
264. Teams get their assignments done on time and achieve the desired results.	1	2	3	4	5	6	7
265. Leaders adopt to the new expectations of their roles (i.e. guidance, coaching, getting the most out of people).	1	2	3	4	5	6	7
266. Skill training is available for new or shifted expectations.	1	2	3	4	5	6	7
267. Information does flow and decisions are made more quickly.	1	2	3	4	5	6	7
268. Employees naturally interact with those with whom it is essential to do their jobs well, including customers, suppliers, people in other units, leaders, etc.	1	2	3	4	5	6	7
269. Structural "best practices" are identified so they can be shared with others.	1	2	3	4	5	6	7

Comments

17. Culture (Cu)

A description of the kinds of general behaviours and interactions that are desired to achieve the vision, values and strategies of the organisation.

	1	2	3	4	5	6	7
270. Our organisation is aware of the written and unwritten rules of its culture.	1	2	3	4	5	6	7
271. Our organisation knows whether your culture supports the behaviours needed to be more productive and maintain quality.	1	2	3	4	5	6	7
272. The leaders model the behaviours that are desirable for the company.	1	2	3	4	5	6	7
273. The leaders truly believe in the capabilities and creativity of their employees.	1	2	3	4	5	6	7
274. The leaders have discussed thoroughly the desired cultural components.	1	2	3	4	5	6	7
275. The desired culture has been defined, including behaviours to maintain, behaviours to adopt and behaviours to stop.	1	2	3	4	5	6	7
276. The desired culture facilitates the achievement of the vision, values and strategies.	1	2	3	4	5	6	7
277. Employees have the opportunity to develop their own list of behaviours (operating principles or norms) by which they want to live and work.	1	2	3	4	5	6	7
278. Our organisation has a bias towards "resolving" behaviour rather than "oscillating" behaviour. Decisions get made and things get done.	1	2	3	4	5	6	7
279. Our organisation has a bias towards encouraging employee education, involvement and development.	1	2	3	4	5	6	7
280. Appropriate changes have been made to policies, procedures and incentives that will support employees to create the culture in the day-to-day work environment.	1	2	3	4	5	6	7
281. Employees routinely ask themselves how they can do things better or faster and act on their insights.	1	2	3	4	5	6	7
282. People look forward to coming to work, solving problems and interacting with customers.	1	2	3	4	5	6	7
283. Culture-building "best practices" are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7



Comments

18. People – Staffing (PS)

The recruitment, selection and training of people for specific assignments who are capable and interested in achieving the assignment's objectives.

	1 CD	2 M D	3 SD	4 U	5 SA	6 M A	7 CA
284. We know what percentage of employees is considered "dead wood" or "retired on the job" in our company.	1	2	3	4	5	6	7
285. We know what the financial and productivity costs of turnover and job transition periods are in our company.	1	2	3	4	5	6	7
286. Employees become greater assets to the company over time because of their business experience and knowledge.	1	2	3	4	5	6	7
287. In times of change, our employees are particularly resistant or slow to adapt.	1	2	3	4	5	6	7
288. The recruiting process targets the employee knowledge, skills, values, and style needed for future company success.	1	2	3	4	5	6	7
289. The selection process does involve employees who will work with the people who are selected in designing selection criteria, interviewing and decision-making.	1	2	3	4	5	6	7
290. The succession process identifies the knowledge, skills, values and style needed for the position, and select people based on merit rather than seniority.	1	2	3	4	5	6	7
291. The staffing plans and procedures ensure that the needed diversity of skills, experience and styles will be recruited and selected by the company.	1	2	3	4	5	6	7
292. The staffing processes find ways to reveal the real talents and interest of candidates.	1	2	3	4	5	6	7

293. The staffing process ensures that the right people are in the right jobs within the company or division.	1	2	3	4	5	6	7
294. The leadership defines the kinds of knowledge, skills and capabilities that are needed for specific assignments.	1	2	3	4	5	6	7
295. Employees are knowledgeable about the skills that are needed and how active are they in developing new capabilities.	1	2	3	4	5	6	7
296. "Entry plans" are used to accelerate the entrance of employees into new jobs.	1	2	3	4	5	6	7
297. Employees are permitted to nominate themselves for job openings.	1	2	3	4	5	6	7
298. Employees who will work with the new person play a major role in his/her selection.	1	2	3	4	5	6	7
299. Practical tools are available to help selection decision-makers to follow a proven process, use relevant criteria and reach consensus.	1	2	3	4	5	6	7
300. People are in the right jobs and planning for the next job.	1	2	3	4	5	6	7
301. Employees see that growth opportunities exist and know how to prepare to be serious candidates.	1	2	3	4	5	6	7
302. Staffing "best practices" are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments



19. People - Performance Management, Development and Appraisal (PM)

The processes used to define the work of employees, and improve and summarise their performance.

	1 CD	2 M D	3 SD	4 U	5 SA	6 M A	7 CA
303. Employees understand their job objectives, opportunities to influence, and accountabilities.	1	2	3	4	5	6	7
304. Leaders provide honest performance feedback.	1	2	3	4	5	6	7
305. Leaders successfully coach and develop the people who report to them.	1	2	3	4	5	6	7
306. The selected performance management system includes objectives (in some form), a development objective, customer requirements and measurements.	1	2	3	4	5	6	7
307. The performance management system is link to the cascading goal-setting process.	1	2	3	4	5	6	7
308. The employees are responsible for creating their goal sheets and getting advice from the supervisor to improve them.	1	2	3	4	5	6	7
309. The performance management system includes regular reviews between employee and supervisor (or teams) on business and development objectives.	1	2	3	4	5	6	7
310. The performance management system has become the basic process for planning and monitoring the progress of individual and work unit objectives.	1	2	3	4	5	6	7
311. People keep their performance records up to date.	1	2	3	4	5	6	7
312. The performance management meetings between employees and supervisors (teams) are productive and focused on improving performance.	1	2	3	4	5	6	7
313. People are completing their development objectives and applying new skills on the job.	1	2	3	4	5	6	7
314. People are providing honest feedback, useful advice and coaching to each other.	1	2	3	4	5	6	7
315. The appraisals are a summary of what has already been discussed, with no surprises.	1	2	3	4	5	6	7
316. Employees openly ask for feedback from customers, team members, suppliers and others.	1	2	3	4	5	6	7

317. The energies of people are focused in the right direction and objectives are being achieved.	1	2	3	4	5	6	7
318. Employees feel supported and take advantage of the growth opportunities.	1	2	3	4	5	6	7
319. Performance management, development and appraisal "best practices" are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments

20. People - Reward and Recognition (RR)

The monetary and non-monetary methods chosen to compensate, reward and recognise employees' contributions to the organisation.

	1 CD	2 M D	3 SD	4 U	5 SA	6 M A	7 CA
320. Employees consider the reward and recognition systems as fair and motivating.	1	2	3	4	5	6	7
321. Employees are rewarded for real contributions (merit) or on some pre-established scale (seniority).	1	2	3	4	5	6	7
322. The employees who contribute the most (re: achieving objectives, innovation and customer satisfaction) receive appropriate reward and recognition.	1	2	3	4	5	6	7
323. The reward and recognition system encourages greater technical skill contributions as well as advancement through the management routes.	1	2	3	4	5	6	7
324. There has been ample employee involvement in the development of the reward and recognition system.	1	2	3	4	5	6	7
325. The system does take into account the different ways people prefer to be rewarded and recognised.	1	2	3	4	5	6	7
326. The reward and recognition system recognises the skills, values and behaviours needed for future organisation success.	1	2	3	4	5	6	7

327. The reward and recognition system is straightforward, simple to understand and easy to administer.	1	2	3	4	5	6	7
328. The system has been documented and shared effectively with employees.	1	2	3	4	5	6	7
329. Leaders have been trained on how to use the R&R system effectively to get the desired employee behaviours.	1	2	3	4	5	6	7
330. Leaders have been coached on the basics of human motivation, so "punishment" mentalities are discarded.	1	2	3	4	5	6	7
331. Rewards and recognition are given quickly.	1	2	3	4	5	6	7
332. Employees use the system to reward and recognise their supervisors, team members, suppliers and others.	1	2	3	4	5	6	7
333. The R&R system has at least a neutral, if not positive, effect on employee performance and satisfaction.	1	2	3	4	5	6	7
334. The R&R system rewards performance, development and living by the values of the organisation.	1	2	3	4	5	6	7
335. The R&R system promotes achievement of the vision, values and strategies of the organisation.	1	2	3	4	5	6	7
336. The employees find the R&R system fair, if not motivating.	1	2	3	4	5	6	7
337. R&R "best practices" are identified so they can be remembered and shared with others.	1	2	3	4	5	6	7

Comments



21. Alignment: Processes, Structures and Human Resources Policies (AL)

The internal alignment of a) the elements, b) the elements with the customer needs, c) the plans with the future trends and d) the daily focus and discipline of the organisation.

	1 CD	2 M D	3 SD	4 U	5 SA	6 MA	7 CA
338. Alignment discussions have been held by the leaders and planners to ensure a cohesive business plan.	1	2	3	4	5	6	7
339. Employees complain of inconsistencies or accuse the leadership of not "walking the talk".	1	2	3	4	5	6	7
340. Our company frequently changes its structure to solve problems.	1	2	3	4	5	6	7
341. The elements of the organisation mesh very well with each other (i.e. the processes and structure, the values, culture and HR systems, the strategies and business environment).	1	2	3	4	5	6	7
342. The aspects of the organisation's work reinforce and serve the customers' needs very well.	1	2	3	4	5	6	7
343. The strategies, plans and daily actions prepare people very well for likely future shifts.	1	2	3	4	5	6	7
344. The daily activities and focus of the company are consistent with the strategy.	1	2	3	4	5	6	7
345. Employees learned about the alignment decisions made by the leaders when setting and implementing the business direction.	1	2	3	4	5	6	7
346. All employees learn to check their actions for alignment with personal objectives, unit objectives, strategies and the company's vision.	1	2	3	4	5	6	7
347. New processes, practices or programmes are adopted (and old ones dropped) because of their degree of alignment with the strategies of the company.	1	2	3	4	5	6	7
348. Routine problem-solving sessions are held to identify and investigate alignment opportunities.	1	2	3	4	5	6	7
349. The organisation is more focused and efficient than ever before.	1	2	3	4	5	6	7
350. Employees are making decisions that are directly related to the best interests of the company and the customer.	1	2	3	4	5	6	7

351. Alignment "best practices" are identified so they can be remembered or shared with others.	1	2	3	4	5	6	7
---	---	---	---	---	---	---	---

Comments

Score Sheet

Scoring instructions: Add up the ratings you gave for the questions within each category. Total the rating for each section. Compute averages for each section.

Improvement Priority Selection

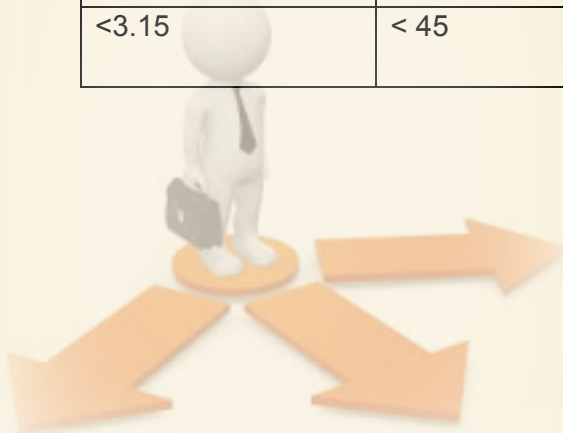
1. Place an appropriate number next to the average scores under the column Improvement.
2. Place a double asterisk (**) next to the three categories (1-21) with the lowest total score.
3. Of those categories selected in Step 2, give a priority #1 to the category that appears first in the questionnaire a #2 to the category that appears next, and a #3 to the category that appears after that.

	Present Total	Divided by	Actual	IMP
A: Mapping Business Environment				
1. Future Forces		112		
2. Customer Needs		119		
3. Competitive Analysis		84		
4. Benchmarking		84		
5. Organisation Realities		98		
6. Core Competencies		112		
Total		609		
Average (total score - 6)				
B: Leadership	Present Total	Divided by	Actual	IMP
7. Effective Leadership Team		147		
8. Individual Leaders		140		
Total		287		
Average (total score - 2)				

C: Setting the Business Direction	Present Total	Divided by	Actual	IMP
9. Vision		126		
10. Mission		84		
11. Values		98		
12. Strategies		140		
13. Operational Plans		112		
14. Communication		112		
Total		672		
Average (total score - 6)				
D: Implementation of the Business Direction	Present Total	Divided By	Actual	IMP
15. Process		133		
16. Structure		182		
17. Culture		98		
18. People - Staffing		133		
19. People - Performance Management		119		
20. People - Reward and Recognition		126		
21. Alignment		98		
Total		889		
Average (total score - 7)				

Benchmark

Average on Points scale	Range	% of Group	Comment
	%		
5.25 - 5.6	75 - 80	< 5%	1. World-Class
4.9 - 5.25	70 - 75	10%	2. Excellent
4.55 - 4.9	65 - 70	10%	3. Very Good
4.2 - 4.55	60 - 65	15%	4. Good
3.85 - 4.2	55 - 65	20%	5. Average/ Below Average
3.5 - 3.85	50 - 55	25%	6. Below Average
3.15 - 3.5	45 - 50	10%	7. Very Poor
<3.15	< 45	< 5%	8. Exceptionally Poor



Business Performance Management

An integrated performance management system does not consist merely out of traditional “performance reviews.” It ideally creates a workplace culture and practices which ensure that everyone across all levels and functions align their work activities to the organisation’s overall strategy. In today’s fast moving and globally competitive environment, it has also become impossible to separate strategic planning and business planning processes. There is a narrowing gap between the development and implementation of strategy, to the point where implementation has to follow immediately behind and must even anticipate shifts in strategy. This requires a series of organisational interventions and changes that are sustained over a period of time to ensure that they become a normal part of business activities.

As indicated below, it requires changes at four levels. The standards and quality requirements that are defined below are usually only attained over a period of two to three business cycles.

However, several of the practices defined under the heading of strategy implementation can be implemented within a few months. This mini survey provides the opportunity to evaluate the status of strategy and business planning processes in your organisation.

Strategy Formulation:

- Senior management redesign the way in which they formulate strategy to already take the operational implications into consideration.
- People at operational levels and within functional areas are given an opportunity to give input which informs and in time influences the strategy formulation.
- A disciplined strategy formulation process becomes an integral part of the organisation’s business planning process.
- The business planning process (establishing strategic assumptions for the forthcoming year, setting broad performance parameters, budgeting, and business reviews) are expanded to include formal periods for team goal setting, individual goal setting and performance discussions.
- Team goal setting is positioned as an essential part of aligning the performance and activities of people across all levels and functions

Strategy Translation and Communication:

- Managers acquire the skills and frameworks which enable them to translate the organisation’s strategy so that it makes sense for people at various levels of the organisation.
- People at various levels develop specific appreciation for their own work context and what implications the organisation’s strategy holds for them.

- People at operational levels become equipped to align their own goals and activities to the requirements at more strategic levels.
- People operate with a practical understanding of the organisation's competitive challenges and circumstances.

Strategy Implementation:

- Initially everyone at upper B to E bands develops the necessary skills to utilise team goal setting, personal goal setting and performance development discussions as methods to manage their own performance.
- In time these skills are rolled out to everyone to enable people at all levels to systematically take charge of and manage their own performance.
- Everyone in the organisation develops a common language and uses congruent methods of managing higher performance.
- Different departments and levels overcome a great deal of potential conflict and misunderstanding because they have a common framework within which to operate.
- If these skills and tools are integrated into a larger change initiative it enables people to start understanding how they fit into and contribute to the organisation's overall strategic direction and performance.
- People across all levels and functions have the same basic skills to operate as self-managing high performance teams.
- Everyone shares a common approach to defining output requirements that they must meet within the next stage of the business cycle.
- Clear quality requirements define the standards that must be fulfilled by self-managing teams and individuals.
- People systematically take charge of their own personal performance discussions and development.

Strategy Assurance:

- Formal monitoring processes are applied to evaluate conformance to standards and systematic improvement of BPM across all levels and functions of the organisation.
- Monitoring processes are used in ways which enable people to take personal charge of ensuring continuous improvement in their own areas of activity.
- Customised practices surveys drive the organisation's specific application of the entire process, whether as a training intervention or as an important part of the change process.



Evaluating the Status of Integrated Practices

Strategy Formulation:

<u>Practices</u>	<u>0</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>
1. My general manager personally interacts with people at all levels to ensure that we understand the organisation's strategic direction.					
2. I/we believe that our general managers conduct a thorough analysis of the organisation's competitive situation on an ongoing basis.					
3. Our general manager participates at least twice per year in sessions during which people at all levels are involved in asking questions and developing understanding of the organisation's strategic direction.					
4. I/we clearly understand how my/our personal work and outputs relate and contribute to the organisation's overall strategy.					
5. Our general manager takes personal time to help people at all levels understand the organisation's competitive pressures and demands.					
6. I/we have a clear understanding of how the organisation's business planning process works.					
7. I/we are involved at least twice per year in discussions about how well the organisation is performing against budget.					
8. I could readily explain the budgets and performance targets for my areas of work.					
9. I have the opportunity to participate directly in setting budget goals for my areas of work.					
10. Open information systems and clear reports make it easy for all us to understand the organisation's performance and capacity to meet competitive demands.					
TOTAL OUT OF 40:					



Rating System: Use the following rating system to determine the existing status of business process management practices in your own area of work. Please be totally honest. As you read each statement ask yourself how well each of the practices have been fulfilled in your area of work during the past year:

Status of development over the past year	Rating
This is an excellent description of practices in my area of work.	4
It does happen well, but there can still be some improvement.	3
It does happen, but there is room for a lot of improvement.	2
It happens very seldom and has little real impact on our work.	1
This does not happen at all where I work.	0

Strategy Translation and Communication:

Practices	0	1	2	3	4
1. During the past twelve months I have been involved at least twice in sessions where our division's or department's manager has communicated to us what the impact of the organisation's strategy is on my/our area of work.					
2. Before we set team goals we are involved in a session where managers explain the relevance of the organisation's strategy and performance demands as it affects us.					
3. It is easy to define the context of my/our performance and work requirements because our general managers make it meaningful and easy to understand.					
4. During the past twelve months my core work team/s have met at least twice to define or refine the context and performance requirements for our area/s of work.					
5. The team I am part of meets at least twice per year with our internal and/or external customers to determine what they expect from us.					
6. I could easily show how my team's goals are aligned to meet the expectations of both internal and external customers.					
7. My/our managers personally interact with me/us to help us to set goals which take out specific context into account.					
8. I/we fully understand the competitive elements that influence my/our work place.					
9. I could easily show how our team goals are linked to the specific context of the area in which I/we operate.					
10. It would not be difficult for me to do a presentation to other teams to explain my/our specific work and performance context.					
TOTAL OUT OF 40:					

Rating System: Use the following rating system to determine the existing status of business process management practices in your own area of work. Please be totally honest. As you read each statement ask yourself how well each of the practices have been fulfilled in your area of work during the past year:

Status of development over the past year	Rating
This is an excellent description of practices in my area of work.	4
It does happen well, but there can still be some improvement.	3
It does happen, but there is room for a lot of improvement.	2
It happens very seldom and has little real impact on our work.	1
This does not happen at all where I work.	0

Strategy Implementation:

Practices	<u>0</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>
1. I feel competent enough to participate in and contribute actively to a good team goal setting session in my area of work.					
2. In my team/s we use our team goals as the most important planning tool to manage our performance.					
3. My manager or supervisor is very good at using team goals to help us to manage our own performance.					
4. I could immediately show anyone a personal copy of my latest team goals which include a goals matrix and quality requirements for each goal.					
5. My team/s meet at least once per month to update our team goals and track performance.					
6. It is easy to participate in a team goal session because our manager/supervisor helps us to use the team goal practices.					
7. I have a set of formal personal goals which I use to manage my own performance.					
8. My personal goals contain a summary of all of my responsibilities to the teams I operate on, as well the competencies I must develop to perform well in my area of work.					
9. I/we clearly understand how our team goals form part of and contribute to the organisation's overall strategy.					
10. If we meet our team and personal goals we will definitely fulfill the performance requirements for our area of work.					
TOTAL OUT OF 40:					

Rating System: Use the following rating system to determine the existing status of business process management practices in your own area of work. Please be totally honest. As you read each statement ask yourself how well each of the practices have been fulfilled in your area of work during the past year:

Status of development over the past year	Rating
This is an excellent description of practices in my area of work.	4
It does happen well, but there can still be some improvement.	3
It does happen, but there is room for a lot of improvement.	2
It happens very seldom and has little real impact on our work.	1
This does not happen at all where I work.	0

Strategy Assurance:

Practices	0	1	2	3	4
1. In my area of work we receive at least weekly information which shows us how we are performing against overall performance targets.					
2. We have open access to any relevant information which helps us to track our performance.					
3. Information is presented to people at all levels in ways which are easy to understand and use to analyse our own workplace's performance.					
4. People at every level are involved at least once per month in discussions about performance in their areas of work.					
5. The regular work performance discussions are used to analyse problems and develop constructive responses.					
6. I/we receive feedback at least four times per year on how well our area of work is implementing team goals, individual goals and performance discussions.					
7. During the past year I have personally initiated at least two formal personal performance discussions with my manager or supervisor.					
8. My manager or supervisor is very constructive during my personal performance discussions and provides good advice on how I can improve my performance.					
9. I could immediately show anyone a copy of my latest personal performance discussion which includes my action plan for personal development.					
10. I/we have been involved directly during the past twelve months to discuss how we could improve our business processes in our area of work.					
TOTAL OUT OF 40:					

Rating System: Use the following rating system to determine the existing status of business process management practices in your own area of work. Please be totally honest. As you read each statement ask yourself how well each of the practices have been fulfilled in your area of work during the past year:

<u>Status of development over the past year</u>	<u>Rating</u>
This is an excellent description of practices in my area of work.	4
It does happen well, but there can still be some improvement.	3
It does happen, but there is room for a lot of improvement.	2
It happens very seldom and has little real impact on our work.	1
This does not happen at all where I work.	0

General Practices Overview

Please indicate whether each of the following ten statements are true or false for your area of work. You may only rate it true if you believe that it represents the way that the particular practice is operating at present, or if it is really true for yourself. If you do not know anything about such a practice rate it false.

<u>Business Practice</u>	<u>True</u>	<u>False</u>
1. Our organisation's business and strategy planning process has been described to me in ways that make it easy to understand.		
2. I fully comprehend how activities such as budgeting, team goals, business reviews and performance reviews fit into the organisation's overall strategy.		
3. My general manager makes a specific effort to ensure that we understand the way in which the organisation's strategy and business processes are conducted.		
4. My colleagues and I are understand the roles we have to fulfill in our own areas of work to contribute to the organisation's overall strategy.		
5. I have a good understanding of how and why it is necessary for us to use practices such as team goals, individual goals and personal performance discussions.		
6. I have received sufficient training to feel very comfortable when I participate in a team goal session.		
7. My manager or supervisor gives me enough support and guidance to ensure that I understand what is expected of me in my work.		

8. I have a good understanding of how well my own area of work is performing on a monthly basis.		
9. In our organisation problems are identified quickly and are always used to find solutions rather than blaming someone for it.		
10. The teams I participate in are very capable of making decisions and implementing them well.		
11. It is very clear what my colleagues and I are allowed to do or not to do as part of our work		
12. We are empowered to make our own decisions in areas of work that have been clearly defined.		
13. In my area of work we regularly get together to find ways of improving our performance.		
14. I understand fully how my work forms part of and helps to achieve the organisation's overall strategy.		
15. I have all the information I need to analyse how well my area of work is performing.		
16. My manager/s continuously encourage me to show initiative and to offer ideas on how to improve performance.		
17. I know how much performance has improved in my area of work over the past year and can prove it through measurement.		
18. There is a comprehensive system which describes all of the competencies that are required for jobs at all levels of the organisation.		
19. I have full access to the organisation's competency system.		
20. I know how to use the organisation's competency system to analyse my own job's competency requirements and how well I am fulfilling them.		
TOTAL NUMBER OF TRUE RATINGS:	/20	

<u>Elements of Business Process Management</u>	<u>Status</u>
Strategy Formulation:	/40 (÷2)=
Strategy Translation and Communication:	/40 (÷2)=
Strategy Implementation:	/40 (÷2)=
Strategy Assurance:	/40 (÷2)=
Overview of BPM:	/20=
TOTAL:	/100

Present - Future Tension

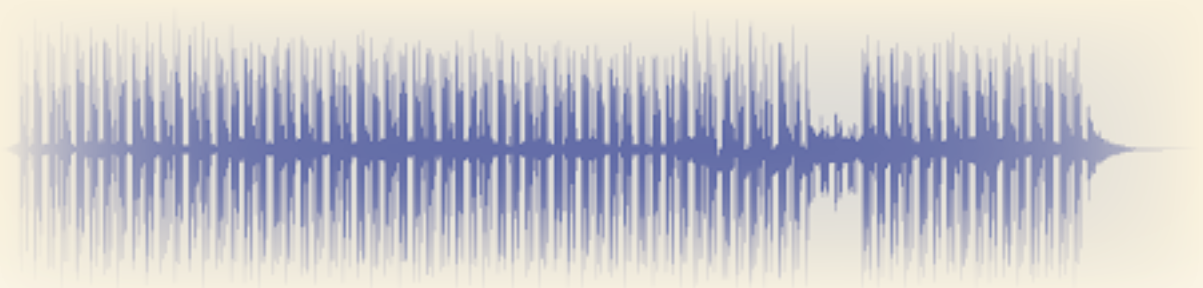
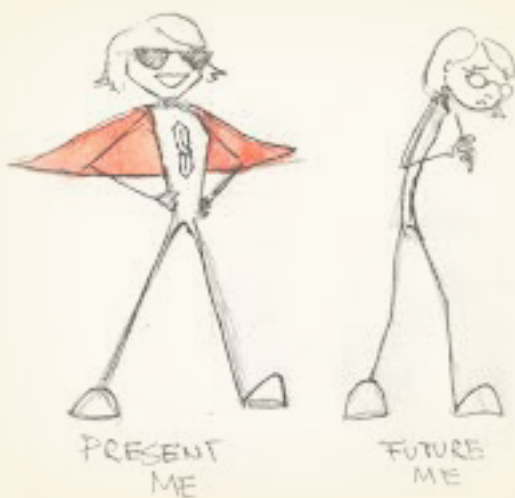
Based upon your overview of the organization, explore the tension between the present and the future by responding to the following questions:

Present	In the Future
Which customers do we serve today?	Which customers will we serve in the future?
Through what channels do we reach customers today?	Through what channels will we reach customers in future?
Who are our competitors today?	Who will be our competitors in future?
What is the basis for our current competitiveness?	What will be our future competitive advantage?
Where do our margins come from today?	Where will our margins come from in the near future?

What skills or capabilities make us unique today?	What skills or capabilities will make us unique in future?

Present	Future
What current executive competencies make us effective?	What future executive competencies will make us succeed?
What workplace attitudes have stood us in good stead?	What future workplace attitudes will be essential for success?
How have we effectively ensured good past performance?	What will be necessary to ensure great future performance?
What are the future imperatives that we have resisted the most?	What are the past traditions that we will have to abandon urgently?

What have we done in the past to ensure adequate innovation?	What will we have to do in future to ensure adequate innovation?



QUALIFICATIONS

MBA, MEd, PhD

INDUSTRIAL PSYCHOLOGIST

Married to his first love Mariene since 1979 and has three sons

* see below

RADIO AND COMMUNITY INVOLVEMENT

250 Radio Talks on
Wisdom that Works and involved in
Character -based principles and
Sound Governance

**AUTHOR and PUBLISHER
OF VARIOUS BOOKS x 15 and
60 x SHORT COACHING BOOKLETS**
Study leader for 160 completed
MBA research projects

INVOLVEMENT IN AFRICA

Training in Cairo, Egypt, Namibia, Ghana,
Uganda, Nigeria, Malawi, Zambia,
Kenya, Liberia, Tanzania
and Mauritius

INTERNATIONAL FACILITATION

Lecturing in France, Antwerpen,
Dortmund, Denmark, Austria, Indonesia,
Oklahoma, Maui, Frankfurt, Thailand,
Bangalore, Australia, England,
India, Leipzig, Canada
Marseilles, China &
Singapore

CORPORATE EXPERIENCE

17 Years experience in
Human Resource and
Executive Management

BUSINESS SCHOOL ACADEMIC

Teaching in Organizational
Behaviour and also International
Human Resource Management, People and
Change Management, High Impact
Leadership, Management
Consulting and
Emotional
Intelligence

BUSINESS CONSULTANT

Very experienced business consultant
both in private and public sector.
Impact player in organizational effectiveness
and renewal and have been involved
in several major strategic and
corporate initiatives.



* Complete CV
available
on Request

For more information contact:

+27 21 979 3198 / 082 882 9903
prstrongmessage@gmail.com / marden@mwweb.co.za
www.thestrongmessage.com