

# IS YOUR ORGANIZATION HEALTHY AND ALIGNED?

Tally up your points to see how well your team is working together. Each line is one point.

## 1. THE LEADERSHIP TEAM IS BALANCED AND IN SYNC.

- Leaders understand each other and their differences.
- The group meets weekly or at least monthly to discuss strategy.
- The team takes part in continuous executive education.
- The team participates in productive discussions, and everyone feels comfortable contributing and having difficult conversations when required.

## 2. EVERYONE IS IN SYNC WITH THE #1 PRIORITY THIS QUARTER, WHICH THE FIRM MUST ACHIEVE TO PROGRESS.

- Everyone understands the number one objective for the quarter and their role in achieving it.
- The activities which support that objective are listed and prioritized for each quarter.
- The company tracks progress against this critical goal weekly and communicates updates to everyone at the firm.

## 3. THE RHYTHM OF COMMUNICATION IS DEFINED, AND INFORMATION FLOWS PRECISELY AND RAPIDLY THROUGH THE ORGANIZATION.

- All team members participate in a 15-minute daily alignment meeting.
- All teams have more thorough weekly meetings.
- Leaders meet monthly for a day that includes training, resolving any issues, and ensuring alignment.
- Executives and middle management meet quarterly and annually for an off-site workshop to work on the business.

## 4. EVERY COMPANY PROCESS AND GOAL IS ASSIGNED TO ONE INDIVIDUAL WHO IS RESPONSIBLE FOR ITS PERFORMANCE.

- The Accountability Chart is finalized (the right people doing the right tasks) and communicated organization-wide.
- There is a person assigned to each line of the financial statements.

## 5. CONTINUOUS FEEDBACK IS PART OF THE COMPANY CULTURE AND IS USED TO DEFINE BARRIERS AND OPPORTUNITIES.

- Leaders have a Start/Stop/Keep Conversations with no less than one team member per week.
- Leaders seek employee feedback on barriers and opportunities weekly.
- The weekly executive team meeting has a standing agenda item to discuss this employee feedback.
- Leaders are assigned to close the loop on ideas and feedback contributed by employees.

## 5. CUSTOMER FEEDBACK DATA IS AS REGULAR AND RELIABLE AS FINANCIAL DATA.

- All leaders have a discussion every week with no less than one end-user.
- Leaders bring that feedback to weekly executive team meetings for discussion.
- A leader is accountable for the process of closing the loop on all input from customers.

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## 7. CORE VALUES AND MISSION ARE FLOURISHING WITHIN THE COMPANY.

- The business has clearly defined core values that are communicated.
- All employees understand how to behave in line with the values.
- HR procedures and operations are consistent with the values (hiring, orientation, appraisal, recognition, disciplinary etc.)
- The firm runs events or other communications activities at least quarterly to reinforce the company's core values and goals.

## 8. ALL TEAM MEMBERS CAN CONFIDENTLY ANSWER WHETHER THEY HAD A SUCCESSFUL DAY OR WEEK.

- Each person or role reports against 1 or 2 Key Performance Indicators (KPIs) weekly.
- Each employee knows their numerical contribution to the firm's critical goal for the quarter.
- Each team has 3-7 Quarterly Priorities/Rocks that align with the firm's priorities.

## 9. THE COMPANY'S STRATEGY AND PROGRESS ARE VISIBLE TO EVERYONE.

- Core Values, Purpose, and Priorities are prominent in your company communications and within any physical office space.
- Scoreboards are displayed everywhere to show the current status of the firm's KPIs and Critical Numbers.
- You have a system in place to track and manage the Priorities and KPIs.

Now add up your score out of 30.

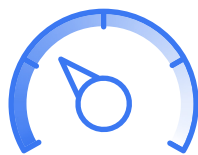
30 - 26



**HEALTHY &  
ALIGNED**

Well done! How can you capitalize on these strengths further?

25 - 21



**ON THE RIGHT  
TRACK**

You have some opportunities to enhance your firm's performance.

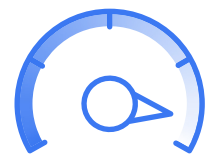
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**FOCUS ON  
IMPROVEMENT**

Strive for improving on sections where you did not mark any checkboxes.

14 - 0



**NEEDS SIGNIFICANT  
IMPROVEMENT**

Meet with your team on what actions you will take immediately to increase the score.