

ORGANISATIONAL HEALTH CHECK



If you're evaluating your business performance, facing challenges, or seeking ways to grow or improve, answering these 20 questions honestly will help you pinpoint areas for improvement and focus. Once you've completed this exercise, contact me to arrange a free consultation to discuss your findings.



STRATEGY & BUSINESS GOALS

	Yes	Part	No
Is there a written, clearly communicated vision shared by everyone in the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are your core values clear, and do you recruit, review, reward, and dismiss based on them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is your core business focus defined, with people and systems aligned and consistently focused on it?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you set a 10-year target that's clear, regularly communicated, and widely shared?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SALES & MARKETING

	Yes	Part	No
Is your target market defined, with marketing and sales efforts focused on it?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you identified at least three unique differentiators, and are they consistently communicated in your marketing and sales?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a documented, proven process for engaging with customers, used consistently by all salespeople?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

LEADERSHIP, PEOPLE & TEAMS

	Yes	Part	No
Are all team members a good cultural fit, sharing your core values?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are organisational charts and job descriptions complete, with defined responsibilities that are regularly updated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are all employees in the right role, do they understand what you want of them, and truly want to be there, and have the capacity and skills to perform well?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your leadership team demonstrate openness, honesty, and high trust amongst themselves and with the wider team?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does everyone have documented goals, with regular performance reviews?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you hold regular team meetings involving everyone in the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do your meetings start and finish on time, follow an agenda, and have documented actions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do your people and teams identify, discuss, and resolve issues for the long-term benefit of the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How is morale, and are your people engaged in the strategy and future success of the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PROCESSES

	Yes	Part	No
Are your core processes documented, simplified, and followed by all to ensure consistent results?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have systems for gathering regular feedback from customers and employees?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

METRICS & DATA

	Yes	Part	No
Do you monitor a small set of critical metrics?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have financial budgets, and regularly monitor performance against them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



RESULTS & FINDINGS

Be honest with your answers, and don't worry if you can't respond positively to every question— even the most successful companies can't achieve and sustain all of these consistently

- Firm 'No' – For any questions answered with a 'No,' consider these as priority areas for potential improvement.
- Partial 'Yes' – Reflect on the steps needed to achieve a full 'Yes.' What benefits could this bring to your organisation?
- Firm 'Yes' – These represent your organisation's strengths. Focus on maintaining these while working to enhance other areas.

DISCUSS YOUR FINDINGS FOR FREE



For a deeper insight into your organisation or to discuss strategies for planning and implementing change, please contact me to arrange your FREE 1-2 hour consultation.

This is where our journey begins—working together to support your business and create the success you're striving for.

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