



ORGANISATIONAL ASSESSMENT

Prepared for:

Bill Carter

of

Test Co Engineering

9th February 2026

Prepared by P.Griffin Consulting Limited

www.pgriffinconsulting.co.uk

Important: This report contains confidential information prepared for the named recipient only.

BACKGROUND

Company: Test Co Engineering

Report for: Bill Carter

Report sent to: Bill@Testcoengineering

Website: testcoengineering.co.uk

Company Number: 123456

Incorporated date: 15th March 2015

Nature of business: Engineering Services

Overview:

Test Co Engineering is a specialist engineering services company based in the South West of England, providing comprehensive engineering solutions to industrial and commercial clients. The company has built a reputation for technical expertise and quality workmanship since its establishment in 2015, serving sectors including manufacturing, construction, and infrastructure.

The business offers a range of services including mechanical engineering, project management, and technical consultancy. With a focus on precision and reliability, Test Co Engineering has developed strong client relationships and maintains a commitment to continuous improvement and professional standards.

The assessment identifies key development opportunities in **strategic clarity, customer wins & retention, and profit drivers**. Addressing these areas is particularly important given the current challenge of communication issues, which may be constraining the company's ability to coordinate effectively and win new business in competitive markets.

Section 1

EXECUTIVE SUMMARY

This assessment of Test Co Engineering reveals an organisation with notable strengths in financial management and customer focus, balanced against significant operational challenges that require immediate attention. With an overall score of 50.0%, the business demonstrates particular strength in Financial Health (100%) and Customer Focus (80%) - both essential foundations for sustainable growth. However, critical weaknesses in Teamwork (20%), Performance (20%), and Risk & Compliance (20%) pose significant risks to the business.

The identified development priorities of **strategic clarity, customer wins & retention, and profit drivers** are directly impacted by these gaps. The biggest stated challenge - communication issues - appears to be symptomatic of deeper structural problems in teamwork and direction. Key questions to explore include: What specific communication breakdowns are occurring and between which teams? How are current performance gaps affecting client delivery? To achieve the breakthrough of winning a big customer in the South West, further investigation is needed into: What differentiates Test Co from competitors in the region? What capabilities need strengthening to win larger contracts?

Overall Assessment		
Score: 50.0%		Average - Typical for many businesses - Significant work required

Rating	Percentage	Description
★★★★★	80% to 100%	World Class: You are performing excellently - Keep going!
★★★★☆	65% to 79%	You are well above average - Opportunity to improve
★★★☆☆	55% to 64%	Just above average - room for significant improvement
★★☆☆☆	40% to 54%	Average - Typical for many businesses - Significant work required
★☆☆☆☆	1% to 39%	Well below average - Many critical issues need to be resolved

Key Highlights:

Your assessment reveals a mixed picture with significant variation across areas. Strong performance in Financial Health (100%), Customer Focus (80%), and People Development (80%) demonstrates solid foundations in key commercial areas. However, critical weaknesses in Teamwork (20%), Performance (20%), and Risk & Compliance (20%) pose significant risks to sustainable growth. Areas scoring 40% in Direction, Empowerment, Technology & Data, and Wellbeing & Adaptability require focused attention. These gaps directly impact your ability to communicate effectively, win new customers, and drive profitability improvements.

Metric	Value
Total Areas Assessed	12
Overall Score	50.0%
Overall Rating	★★ (2 stars)
Strong Areas (4-5 stars)	3
Developing Areas (3 stars)	2
Weak Areas (1-2 stars)	7

What this means for your business:

- **Profit Impact:** Weak teamwork and performance management create inefficiencies that erode margins and limit revenue growth potential. Strong financial health provides the foundation to invest in improvements.
- **Risk Exposure:** Critical gaps in risk & compliance (20%) expose the business to regulatory and operational risks that could have serious consequences.
- **Growth Constraint:** Without addressing communication issues and strengthening direction, winning a big customer in the South West will prove challenging as larger clients expect coordinated, professional service.

Important: This assessment is based solely on the self-assessment responses provided. I recommend validation through an independent evaluation to confirm findings and develop a comprehensive action plan.

Section 2

WHY THIS MATTERS NOW

The engineering services sector demands both technical excellence and operational reliability. Your current score of 50.0% indicates solid commercial foundations but critical vulnerabilities in internal operations that will limit your growth trajectory. In today's competitive market, failing to address teamwork and communication issues will compound existing challenges, creating barriers to winning the larger contracts you're seeking in the South West.

However, this assessment also reveals opportunities. Your strengths in financial health, customer focus, and people development provide a stable platform for improvement. By leveraging these foundations whilst addressing the critical gaps in teamwork, performance, and risk management, you can transform current constraints into competitive advantages. The key is acting decisively before operational weaknesses impact client relationships and market reputation.

The communication and teamwork challenges identified in this assessment are not new problems - they have likely been building over time. The longer they go unaddressed, the harder they become to resolve and the more they impact your ability to win new business:

'The best time to plant a tree was 20 years ago. The second best time is now.'

- Chinese Proverb

Your operational strengths aren't just assets to preserve - they're the foundation for addressing current weaknesses. Strong financial health gives you the resources to invest in improvements. Excellent customer focus creates the commercial rationale for strengthening internal operations. Good people development means you have the talent to build better teamwork. The question isn't whether you can improve, but whether you'll act before the cost of inaction exceeds the investment required.

If nothing changes...

Without intervention, expect the following within 12-18 months: continued communication breakdowns affecting project delivery and client satisfaction; missed opportunities to win larger contracts as competitors demonstrate stronger operational capabilities; growing compliance and risk exposure that could result in regulatory issues or project failures; and declining team morale as frustrations with poor collaboration compound. The strong financial position that sustains you today will erode as operational inefficiencies impact profitability.

Section 3

ORGANISATIONAL ASSESSMENT OVERVIEW

Assessment Area	Score	Action Status
Teamwork	★	Critical - Immediate action required
Performance	★	Critical - Immediate action required
Risk & Compliance	★	Critical - Immediate action required
Direction	★★	Critical - Immediate action required
Empowerment	★★	Critical - Immediate action required
Technology & Data	★★	Critical - Immediate action required
Wellbeing & Adaptability	★★	Critical - Immediate action required
Leadership	★★★	Important - Action needed
Processes & Efficiency	★★★	Important - Action needed
Customer Focus	★★★★	Monitor - Maintain performance
People Development	★★★★	Monitor - Maintain performance
Financial Health	★★★★★	Monitor - Maintain performance

Action Status Legend:

Critical - Immediate action required: Scores 1-2 stars - fundamental weaknesses requiring urgent intervention

Important - Action needed: Score 3 stars - performing adequately but significant room for improvement

Monitor - Maintain performance: Scores 4-5 stars - strong performance to sustain and leverage

Section 4

KEY WEAKNESSES AND CONSTRAINTS

Further investigation is essential to identify root causes, understand interdependencies, and develop effective interventions that address underlying challenges rather than merely treating symptoms. The following areas require immediate attention:

Teamwork (★)

Potential Impact: Poor collaboration creates silos, duplicates effort, and means valuable knowledge stays locked in individual heads rather than being shared across the organisation. This directly contributes to the communication issues identified as your biggest challenge and will undermine your ability to deliver coordinated service to larger clients.

Recommendation: Institute regular team meetings with structured agendas, create cross-functional project teams for key initiatives, establish protocols for knowledge sharing and documentation, and recognise collaborative behaviours. Consider team building activities to strengthen relationships.

Performance (★)

Potential Impact: Absence of clear performance targets and tracking mechanisms means accountability is weak, problems surface late, and opportunities for improvement go unrecognised. This creates inefficiencies that erode profitability and makes it difficult to identify and reward high performers - critical for driving profit improvements.

Recommendation: Establish SMART objectives for all roles, implement monthly performance reviews, create visible performance dashboards, and link individual targets to business objectives around productivity, quality, and client satisfaction.

Risk & Compliance (★)

Potential Impact: Operating without robust risk management and compliance frameworks exposes the business to regulatory penalties, project failures, and reputational damage. In the engineering sector, this could have serious safety and legal implications that threaten the entire business.

Recommendation: Conduct a comprehensive risk audit, implement documented risk management procedures, ensure all regulatory obligations are identified and met, and establish regular compliance reviews. Consider external support to establish robust frameworks.

Direction (★★)

Potential Impact: Unclear strategic direction creates confusion about priorities, misaligns effort, and makes it difficult to make coherent decisions about resource allocation. This directly impacts your ability to achieve strategic clarity and coordinate effectively as a team.

Recommendation: Develop and communicate a clear 3-year strategic plan, articulate measurable objectives for market position and growth targets, ensure all staff understand how their role contributes, and review progress quarterly with the whole team.

Empowerment (★★)

Potential Impact: When staff lack autonomy and trust to make decisions, bottlenecks form, responsiveness suffers, and engagement declines. This slows project delivery and frustrates both team members and clients who expect prompt, decisive action.

Recommendation: Define clear decision-making authority for different roles, provide training and support to build confidence, establish guidelines that enable autonomous action within boundaries, and recognise initiative and problem-solving.

Technology & Data (★★)

Potential Impact: Operating without adequate systems and data means decisions are made on gut feel rather than evidence, inefficiencies go unmeasured, and opportunities for improvement remain hidden. This limits your ability to optimise operations or demonstrate value to potential larger clients.

Recommendation: Audit current technology gaps, invest in integrated systems for project tracking and client management, implement dashboards showing key operational metrics, and train staff in data-driven decision-making.

Wellbeing & Adaptability (★★)

Potential Impact: Neglecting wellbeing and adaptability increases stress, reduces resilience, and makes change initiatives harder to implement successfully. In a demanding engineering environment, this impacts safety, quality, and retention.

Recommendation: Introduce wellbeing check-ins, create mechanisms for staff to raise concerns safely, invest in change management capabilities, and build flexibility into work practices where possible.

Key Questions for Investigation:

These questions should be explored through detailed investigation, stakeholder interviews, and process analysis:

1. What specific communication breakdowns are occurring and between which teams or individuals?
2. Which projects or client relationships have been most affected by teamwork and coordination issues?
3. What compliance and risk management gaps pose the greatest threat to the business?
4. How are decisions currently made, and where do bottlenecks occur?
5. What would a compelling 3-year strategic vision look like that would energise the team?
6. What technology or systems investments would most improve operational efficiency?
7. What changes would staff most like to see in how work is organised and managed?

Section 5

STRENGTHS TO BUILD UPON**Customer Focus (★★★★)**

Value: Consistently meeting or exceeding customer expectations builds loyalty, generates referrals, and creates competitive advantage. This strength provides the foundation for winning larger contracts and expanding into new markets in the South West.

People Development (★★★★)

Value: Strong investment in people and recognition of good performance attracts and retains talent, builds capability, and demonstrates commitment to excellence. This foundation supports the teamwork improvements needed.

Financial Health (★★★★★)

Value: Exceptional financial management provides the resources and stability needed to invest in growth, weather challenges, and make strategic decisions from a position of strength. This creates options and demonstrates the commercial discipline that larger clients expect.

Leveraging strengths to address weaknesses:

Your operational strengths provide leverage for addressing internal challenges. Strong financial health funds the investments in systems, training, and structural changes needed. Excellent customer focus creates the commercial rationale for improving internal operations - better teamwork delivers better client service. Strong people development means you have the talent to build more effective collaboration. The strategy is clear: use what's working to fix what isn't, channelling commercial success into operational improvement.

Section 6

PRIORITY NEXT ACTIONS (NEXT 90 DAYS)

#	Timeframe	Action	Priority
1	Week 1	Book strategy consultation to validate findings and agree priorities	High
2	Weeks 2-4	Conduct team interviews to understand communication breakdowns and collaboration barriers	High
3	Weeks 4-6	Complete risk and compliance audit to identify critical gaps	High
4	Weeks 6-8	Define 3-5 key performance indicators and implement basic tracking	High
5	Weeks 8-10	Articulate and communicate 3-year strategic direction to all staff	Medium
6	Weeks 10-12	Implement weekly team meetings with structured collaboration protocols	Medium
7	Week 13	Conduct 90-day progress review and refine action plan	High

Important: These actions are sequenced to build momentum whilst addressing the most critical gaps. Start with validation and team engagement before implementing structural changes. Quick wins in communication and collaboration create evidence to support larger investments in systems and processes.

What success looks like in 90 days:

- 1. Improved communication:** Regular team meetings established, clear communication protocols in place, and visible reduction in coordination issues affecting project delivery.
- 2. Risk management foundations:** Critical compliance gaps identified and addressed, risk register established, and regular review process implemented.
- 3. Strategic clarity:** Clear 3-year direction communicated to all staff, with measurable objectives for winning larger contracts in the South West.

Section 7

RECOMMENDATIONS

The assessment reveals both the challenge and the opportunity facing Test Co Engineering. Your commercial strengths in financial management and customer focus provide a solid foundation, but internal operational gaps in teamwork, performance, and risk management constrain growth. The path forward requires addressing these gaps systematically whilst leveraging existing strengths.

I'd welcome the opportunity to discuss these findings in a complimentary strategy consultation. This session would allow us to validate the priorities, understand your specific context more deeply, explore what success looks like for you, and identify the constraints that might affect implementation. Most importantly, we can determine the highest-impact actions for where Test Co Engineering is now.

The consultation includes:

- Detailed review of findings with opportunity to challenge and clarify
- Discussion of root causes behind the patterns revealed in your responses
- Exploration of quick wins versus longer-term structural changes
- Identification of potential barriers and how to navigate them
- Clear next steps tailored to your specific situation

This is a no-obligation conversation - your chance to test whether the findings resonate, whether my approach fits your needs, and whether there's value in working together. Many businesses benefit from an objective external perspective to validate their thinking and provide accountability for implementation.

Given your stated challenge of communication issues, and your goal to win a big customer in south west, addressing the teamwork, performance, and risk management gaps identified in this assessment isn't optional - it's fundamental. The consultation provides a structured way to convert these insights into practical action.

Who this consultation is most useful for:

- Business owners ready to move beyond firefighting and build sustainable capability
- Leaders who recognise that internal challenges compound into commercial problems
- Organisations where commercial strengths exist but internal operations need strengthening
- Businesses seeking external perspective to validate priorities and challenge thinking
- Teams prepared to invest time and resources in structured improvement

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SUMMARY

Area	Rating
Direction	★★
Leadership	★★★★
Empowerment	★★
Teamwork	★
Customer Focus	★★★★★
People Development	★★★★★
Processes & Efficiency	★★★★
Technology & Data	★★
Performance	★
Risk & Compliance	★
Financial Health	★★★★★★
Wellbeing & Adaptability	★★

Priority vs Impact Matrix

	High Impact	Moderate Impact
High Priority	Teamwork Performance Risk & Compliance	Direction Empowerment
Moderate Priority	Technology & Data	Wellbeing & Adaptability

Leadership Reflection

The challenges identified in this report represent opportunities for growth and transformation. By addressing them systematically, you can unlock the success you're seeking.

Ask yourself:

What would solving communication issues unlock for the business and for me personally?

If win a big customer in south west were guaranteed, what would I be willing to invest to make it happen?

What's the real cost of continuing as we are - not just financially, but in terms of missed opportunities and unrealised potential?

What specific barriers are preventing effective teamwork and collaboration?

What would our business look like if every team member understood and was aligned with our strategic direction?



ABOUT P.GRIFFIN CONSULTING

Running a business is demanding - especially when you're juggling growth, people, customers and the constant pull of day-to-day pressures. At P.Griffin Consulting, the focus is on bringing clarity where things feel complex, strengthening leadership where confidence is stretched, and building high-performing teams that turn ambition into results. The goal is simple: help businesses unlock profitable, sustainable success they can rely on.

I work alongside business leaders across the South of England who want to move beyond firefighting and start leading with purpose. With many years of real-world experience growing brands, leading teams and driving commercial performance, I understand the challenges first-hand - because I've faced them myself. That's why my work is always practical, grounded and focused on what genuinely moves the needle.

What motivates me most is seeing businesses thrive when clarity, confidence and collaboration begin to click. Through P.Griffin Consulting, I combine strategic thinking with hands-on support to help owners and leaders build stronger organisations, smarter strategies and teams that are engaged, capable and committed. The result is growth that feels controlled, sustainable and aligned with the future you want to create.

My experience in team development, performance management, and strategic planning is precisely what Test Co Engineering needs to address the communication and teamwork challenges identified in this assessment, enabling you to win the larger contracts you're seeking in the South West.

'The impact you have had on both our team and business has been remarkable!'

- Co-founder, Manufacturing Sector

Contact Details

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**Thank you for completing the Organisational Assessment.
Let's start this journey together to create sustainable success for Test Co Engineering.**