

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 clearly defined, with your 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 throughout your organisation 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 and objectives, with regular reviews of performance against these?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do you hold regular team meetings, and company briefings 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

- Are your core processes documented, simplified, and followed by all to ensure consistent results?
- Do you have systems for gathering regular feedback from customers and employees, review it regularly and take action from this insight?

Yes Part No

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METRICS & DATA

- Have you identified and monitor a small set of critical metrics that indicate progress against your key business drivers?
- Do you have financial budgets or forecasts, and regularly monitor performance against them?

Yes Part No

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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.

This organisational health check is based on the templates outlined in Traction: Get a Grip on Your Business by Gino Wickman. I highly recommend this book to clients, as it provides a clear, actionable framework for running a successful business. Its principles align closely with my approach to projects and play a key role in building sustainable success.

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.