

ORGANIZATIONAL ASSESSMENT REVIEW (OAR)

Background and Orientation to the Organizational Assessment Review

By reviewing years of best practices research and collecting best practices benchmarks from over 120 companies globally, Bill Bean and Terry Anderson have come up with a series of critical best practices assessment items that you can use as a generic benchmark to gauge your company's current level of optimization. It is the Organizational Assessment Review (OAR). The five arenas of performance and ten individual levers of optimization are outlined in the performance wheel on the next page. Please review these areas in preparation for assessing the current levels of functioning in your organization.

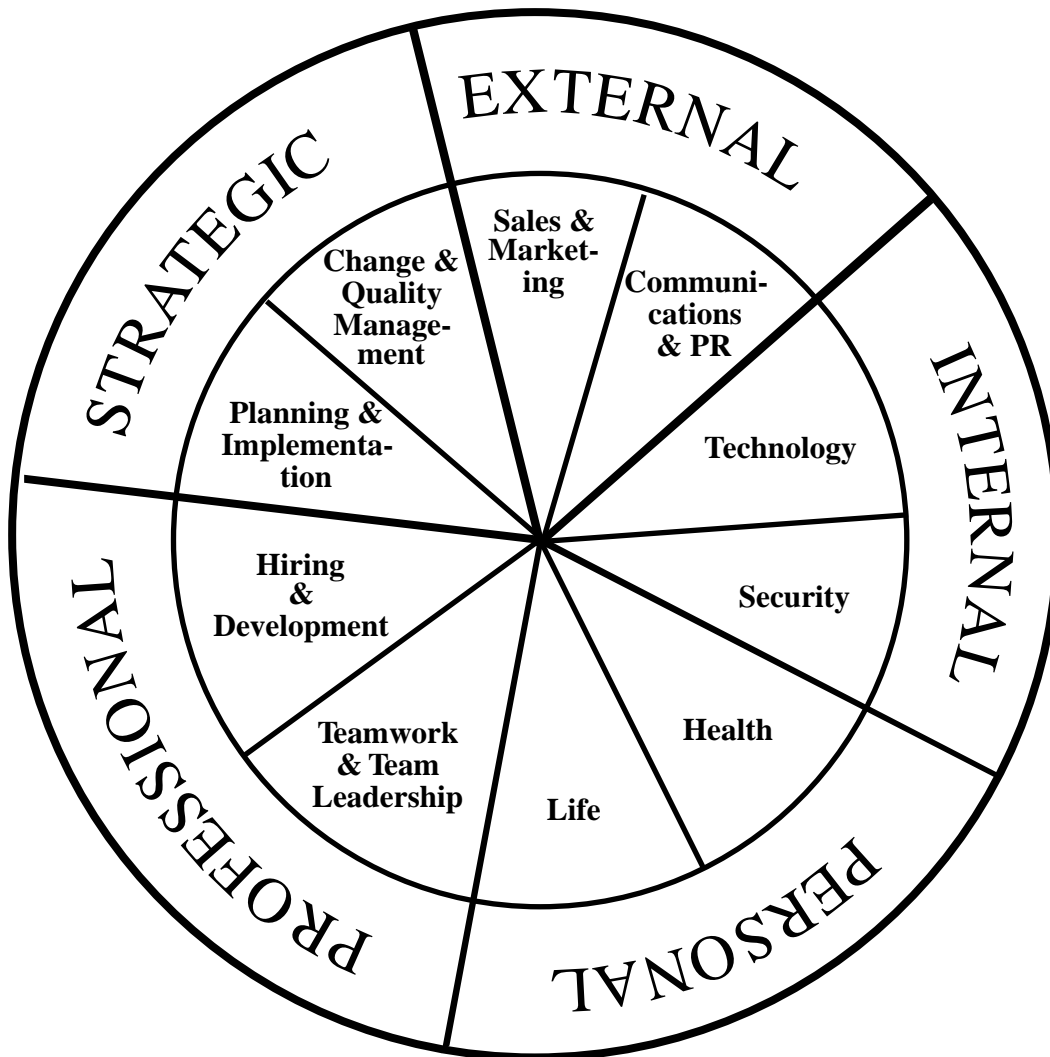
In this edition of the OAR there is now space for comments at the bottom of each page. Please use these spaces—if you need more room to make comments use the back of each page to be as specific as you can in describing what exactly are your concerns.

All of your responses will be collated and returned to the consultant who will assist you to use the information as an indicator of current performance and help you to design your plan for performance optimization.

All numeric responses and written comments will be kept confidential. Comments will be typed, sorted, and presented in the seminar or retreat pre-work report that will be developed from this material. Every effort will be made to insure anonymity in this process.

ORGANIZATIONAL ASSESSMENT REVIEW (OAR)

I. ARENAS



The Underlying Premise:

There are several key levers for overall organizational optimization. This assessment provides a simple yet penetrating view of your company's strengths and weaknesses in 10 major areas. See where you stand! Then consider the priority and the order in which each needs to be addressed.

II. ASSESSMENT

Please indicate the extent of your agreement regarding how your organization is performing in each of the following areas by writing in the boxes on the following pages, the most accurate number on a scale of 10. Note that each question is also given an urgency rating.

RATING SCALE:

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

Assessment
Extent of agreement with this item as applies to our organization

Urgency
Extent of urgency required on this item

II. ASSESSMENT (continued)

A. STRATEGIC

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

1. Planning and Implementation:

	Assessment Scoring	Urgency Scoring
a. We have a clear, written set of strategic priorities.	<input type="checkbox"/>	<input type="checkbox"/>
b. We have a well-defined strategic planning process.	<input type="checkbox"/>	<input type="checkbox"/>
c. We regularly make clear, written action plans that guide us to implement the strategic priorities in our planning process.	<input type="checkbox"/>	<input type="checkbox"/>
d. We have a solid monthly tracking system and meeting, that benchmarks our progress against the written action plans.	<input type="checkbox"/>	<input type="checkbox"/>
e. Our strategic priorities get implemented in a timely, predictable fashion.	<input type="checkbox"/>	<input type="checkbox"/>
f. Our scarce resources are deployed to high-yield arenas.	<input type="checkbox"/>	<input type="checkbox"/>
g. Flexibility is demonstrated when addressing new initiatives.	<input type="checkbox"/>	<input type="checkbox"/>
h. Our organization has a clear vision, purpose, and goals that are effectively communicated to all, and enlisted in by all.	<input type="checkbox"/>	<input type="checkbox"/>
i. Our executives possess strong planning and implementation capabilities.	<input type="checkbox"/>	<input type="checkbox"/>
j. We have a mechanism that resolves existing conflicts and surfaces real agendas and needs.	<input type="checkbox"/>	<input type="checkbox"/>
COLUMN TOTALS	<input style="width: 50px; height: 40px;" type="checkbox"/>	<input style="width: 50px; height: 40px;" type="checkbox"/>

Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

II. ASSESSMENT (continued)

A. STRATEGIC (continued)

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

2. Change and Quality Management:

	Assessment Scoring	Urgency Scoring
a. We have the capabilities for making complex changes.	<input type="checkbox"/>	<input type="checkbox"/>
b. We have an excellent record of successful major changes.	<input type="checkbox"/>	<input type="checkbox"/>
c. We have a strong and effective product/services quality system.	<input type="checkbox"/>	<input type="checkbox"/>
d. All employees know how to improve their processes so that internal and external customers' expectations are exceeded.	<input type="checkbox"/>	<input type="checkbox"/>
e. We know and achieve customer-focused quality targets for our business processes.	<input type="checkbox"/>	<input type="checkbox"/>
f. We have a quick and effective new product/service development process.	<input type="checkbox"/>	<input type="checkbox"/>
g. We know who our customers are, who our potential customers are, and what they need.	<input type="checkbox"/>	<input type="checkbox"/>
h. We know how to translate customer needs into successful products and services. Our track record proves this.	<input type="checkbox"/>	<input type="checkbox"/>
i. All employees have technical tools to analyze quality improvement opportunities, and to make these improvements happen.	<input type="checkbox"/>	<input type="checkbox"/>
j. We have creativity and innovation tools and techniques to solve problems and create new products and services.	<input type="checkbox"/>	<input type="checkbox"/>

COLUMN TOTALS

<input style="width: 50px; height: 40px; border: 2px solid black;" type="checkbox"/>	<input style="width: 50px; height: 40px; border: 2px solid black;" type="checkbox"/>
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Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

II. ASSESSMENT (continued)

B. *EXTERNAL*

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

3. Sales and Marketing:

	Assessment Scoring	Urgency Scoring
a. We have a clearly defined set of market segments for our products/ services.	<input type="checkbox"/>	<input type="checkbox"/>
b. For each market segment, we have a clearly defined business development process, focused on selling each product type to the decision-makers (e.g., Chief Financial Officer, VP-Engineering, CEO) that are most involved in making a purchase decision.	<input type="checkbox"/>	<input type="checkbox"/>
c. Our business development process(es) allow us to track the quality and quantity of our sales and marketing efforts, thus providing a high degree of predictability.	<input type="checkbox"/>	<input type="checkbox"/>
d. We have a clear understanding of the tangible reasons why clients purchase from us. (Those features and other attributes about our products or services that meet the business-related needs of the client.)	<input type="checkbox"/>	<input type="checkbox"/>
e. We have a very clear understanding of the intangible reasons why clients purchase from us. (The emotional, non-product specific reasons why they buy.)	<input type="checkbox"/>	<input type="checkbox"/>
f. Our marketing and sales efforts clearly differentiate us from our competitors.	<input type="checkbox"/>	<input type="checkbox"/>
g. New products and services are developed quickly to respond to newly discovered customer needs.	<input type="checkbox"/>	<input type="checkbox"/>
h. Our products and services are innovative, flexible, and anticipate future trends.	<input type="checkbox"/>	<input type="checkbox"/>
i. We conduct surveys of our customers' satisfaction and needs on a regular basis and connect this information to our marketing strategic plan.	<input type="checkbox"/>	<input type="checkbox"/>
j. We have a well-trained, high performing sales team and team leader.	<input type="checkbox"/>	<input type="checkbox"/>
COLUMN TOTALS	<input style="width: 50px; height: 30px;" type="checkbox"/>	<input style="width: 50px; height: 30px;" type="checkbox"/>

Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

II. ASSESSMENT (continued)

B. *EXTERNAL* (continued)

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

5. Technology:

	Assessment Scoring	Urgency Scoring
a. Our Information Systems (I/S) organization is highly responsive to the technology needs of the enterprise.	<input type="checkbox"/>	<input type="checkbox"/>
b. The technology we use is designed specifically for our business.	<input type="checkbox"/>	<input type="checkbox"/>
c. We effectively use technology in identifying problems and making critical decisions.	<input type="checkbox"/>	<input type="checkbox"/>
d. We take advantage of and exploit the potential of the Internet and Intranet.	<input type="checkbox"/>	<input type="checkbox"/>
e. We implement changes to software and hardware quickly, efficiently, and effectively.	<input type="checkbox"/>	<input type="checkbox"/>
f. Our use of technology allows us to quickly and effectively support changes and continuous improvements in our enterprise processes.	<input type="checkbox"/>	<input type="checkbox"/>
g. We use technology to communicate with our customers.	<input type="checkbox"/>	<input type="checkbox"/>
h. We are taking maximum advantage of the latest innovations in technology.	<input type="checkbox"/>	<input type="checkbox"/>
i. We effectively use technology for instantaneous communications throughout the enterprise.	<input type="checkbox"/>	<input type="checkbox"/>
j. Technology provides us with the strategic tools we need to quickly capitalize on new markets, manage enterprise change, and maintain our advantage when competitors innovate.	<input type="checkbox"/>	<input type="checkbox"/>

COLUMN TOTALS

<input style="width: 50px; height: 40px;" type="checkbox"/>	<input style="width: 50px; height: 40px;" type="checkbox"/>
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Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

II. ASSESSMENT (continued)

C. INTERNAL (Continued)

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

6. Security:

	Assessment Scoring	Urgency Scoring
a. Current security policies and procedures are accessible, understood, agreed upon, and effective.	<input type="checkbox"/>	<input type="checkbox"/>
b. Employee selection, orientation, and training is rigorous, thorough, and effectively detects, prevents, and corrects security problems.	<input type="checkbox"/>	<input type="checkbox"/>
c. Security threats or risks are quickly detected, identified and any incident of violence or harassment is swiftly addressed.	<input type="checkbox"/>	<input type="checkbox"/>
d. The security department has communicated and effectively implements policies and procedures regarding lost and found items, smoking, entering the building after hours, and immediate or emergency health care (CPR, first aid, etc.).	<input type="checkbox"/>	<input type="checkbox"/>
e. Effective measures are in place to communicate, protect, and dispose of information so that only authorized personnel have access to confidential information.	<input type="checkbox"/>	<input type="checkbox"/>
f. There are effective centralized policies and programs in place for the copy-rights, purchase, distribution, installation, and training for software and hardware.	<input type="checkbox"/>	<input type="checkbox"/>
g. Access to the Internet is provided and used only for activities that effectively enhance job performance.	<input type="checkbox"/>	<input type="checkbox"/>
h. The physical layout of the building(s), locks, and security devices is such that it effectively controls access to restricted areas and contributes to a safe and secure environment.	<input type="checkbox"/>	<input type="checkbox"/>
i. The physical layout of the surrounding grounds and parking area(s) is such that it effectively contributes to the protection and safety of staff and members of the public.	<input type="checkbox"/>	<input type="checkbox"/>
j. Electronic security measures (such as alarms and video cameras) provide effective detection and prevention of security threats and intrusions.	<input type="checkbox"/>	<input type="checkbox"/>
COLUMN TOTALS	<input style="width: 50px; height: 30px;" type="checkbox"/>	<input style="width: 50px; height: 30px;" type="checkbox"/>

Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

II. ASSESSMENT (continued)

D. PERSONAL:

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

7. Life:

	Assessment Scoring	Urgency Scoring
a. Our people do not work chronically long hours.	<input type="checkbox"/>	<input type="checkbox"/>
b. Outside personal activities are encouraged and supported.	<input type="checkbox"/>	<input type="checkbox"/>
c. Community service is encouraged and supported.	<input type="checkbox"/>	<input type="checkbox"/>
d. Family situations and needs are handled sensitively and with respect.	<input type="checkbox"/>	<input type="checkbox"/>
e. Our people reflect well being at work and have a record of personal health.	<input type="checkbox"/>	<input type="checkbox"/>
f. We promote a unique corporate culture that encompasses all levels, and matches our organization's purpose and mission.	<input type="checkbox"/>	<input type="checkbox"/>
g. We provide opportunities for all employees to clarify their strengths, interests, sense of purpose, and goals.	<input type="checkbox"/>	<input type="checkbox"/>
h. We provide opportunity for people who work here to plan to live a fulfilled, balanced life and career.	<input type="checkbox"/>	<input type="checkbox"/>
i. Our people are excited about working for us.	<input type="checkbox"/>	<input type="checkbox"/>
j. The management/personnel of our organization effectively model a living in their personal lives that inspires and encourages our employees, associates, etc..	<input type="checkbox"/>	<input type="checkbox"/>

COLUMN TOTALS

Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

II. ASSESSMENT (continued)

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

D. PERSONAL:
(continued)

8. Health:

	Assessment Scoring	Urgency Scoring
a. Our organization has incurred, as a part of its strategic plan, goals to minimize work stress and proactively promote the health and wellness of its employees.	<input type="checkbox"/>	<input type="checkbox"/>
b. Someone in our organization has the responsibility, authority and budget to assess and address any factors that can be demonstrated to interfere with physical health, productivity or morale of employees.	<input type="checkbox"/>	<input type="checkbox"/>
c. We have an adequate employee benefits program that includes health insurance, dental work, eye and hearing examinations and prescriptions, and an employee assistance program that addresses personal concerns about the job, family and emotional health.	<input type="checkbox"/>	<input type="checkbox"/>
d. When employees at all levels have work related health, safety, productivity, or morale concerns they have a responsive, problem-solving advocate to hear and communicate their concerns to those who have the capacity to resolve them.	<input type="checkbox"/>	<input type="checkbox"/>
e. There is ample opportunity in this organization to learn about health, safety, and morale to enhance knowledge and skills through training, education, and on the job coaching — people here are encouraged to be healthy.	<input type="checkbox"/>	<input type="checkbox"/>
f. The management of our organization effectively models health, wellness, productivity, and morale building practices.	<input type="checkbox"/>	<input type="checkbox"/>
g. When appropriate we provide training to our people for coping with corporate stress.	<input type="checkbox"/>	<input type="checkbox"/>
h. Overall, the employees in this organization are healthy, productive, and the morale or spirit is high.	<input type="checkbox"/>	<input type="checkbox"/>
i. The physical work environment(s) in our organization is safe, pleasant, designed for health, and promotes productivity.	<input type="checkbox"/>	<input type="checkbox"/>
j. People generally respect one another here, share similar work values, accept a diversity of people and their beliefs, and overall ours is a healthy desirable place to work.	<input type="checkbox"/>	<input type="checkbox"/>

COLUMN TOTALS

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Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

II. ASSESSMENT (continued)

E. PROFESSIONAL

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

	Assessment Scoring	Urgency Scoring
9. Hiring and Development:		
a. We analyze each job by task, skills and level of difficulty, and connect each job role and description to the implementation of our strategic plan.	<input type="checkbox"/>	<input type="checkbox"/>
b. Each job description specifies internal and external "customers" served, results expected, extent of authority, performance criteria, and progress evaluation.	<input type="checkbox"/>	<input type="checkbox"/>
c. New job applicants are screened based on the extent to which they have the necessary skills, knowledge, work history, training, and education.	<input type="checkbox"/>	<input type="checkbox"/>
d. Using two or more interviewers we assess the capability of "short listed" candidates for a job by examining their strengths, difficult areas, reaction to stress, past team performance, leadership potential, and past job performance.	<input type="checkbox"/>	<input type="checkbox"/>
e. Using the above criteria we take the time to thoroughly and systematically evaluate the extent of a "fit" between each applicant and the job to be filled.	<input type="checkbox"/>	<input type="checkbox"/>
f. In our orientation process, we make sure employees clearly understand their tasks, expected results, and work style, and know how their job makes a part of the strategic plan happen.	<input type="checkbox"/>	<input type="checkbox"/>
g. All new employees understand the written criteria used to measure their performance, know their next appraisal date, team work expectations and length of time they will be on probation.	<input type="checkbox"/>	<input type="checkbox"/>
h. At a scheduled time, we give all employees clear feedback about the results they have achieved, their task performance and problem areas, relationship performance, work/style fit, and probationary status.	<input type="checkbox"/>	<input type="checkbox"/>
i. During this performance review, we let employees know how well they have performed their part of the strategic plan and help them pinpoint training needs so that they get the training and on-the-job coaching they need in a timely fashion.	<input type="checkbox"/>	<input type="checkbox"/>
j. Employees have a clear plan for personal and professional development, and know about future job potentials, options for transfer, and promotion.	<input type="checkbox"/>	<input type="checkbox"/>
COLUMN TOTALS	<input style="width: 50px; height: 30px;" type="checkbox"/>	<input style="width: 50px; height: 30px;" type="checkbox"/>

Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

II. ASSESSMENT (continued)

E. PROFESSIONAL (continued)

Strongly Disagree	Disagree	Partly Agree	Agree	Strongly Agree
1-2	3-4	5-6	7-8	9-10

10. Teamwork and Team Leadership:

	Assessment Scoring	Urgency Scoring
a. Members of each team have had a good opportunity to read, discuss with their supervisor or leader, and enlist in the vision, purpose, values, goals, and strategic plans that will move our organization toward a preferred future.	<input type="checkbox"/>	<input type="checkbox"/>
b. Team members have "buy in" of the written and expressed driving vision, values and goals that are communicated by our organization's leaders.	<input type="checkbox"/>	<input type="checkbox"/>
c. Team leaders and members have good attending and listening skills, communicate accurate understanding of one another's feelings and views, and challenge one another respectfully.	<input type="checkbox"/>	<input type="checkbox"/>
d. Team leaders and members have agreed upon steps and skills they use in order to overcome impasses, resolve conflicts, solve problems, and make decisions creatively.	<input type="checkbox"/>	<input type="checkbox"/>
e. Team leaders and members understand and accept other's personal styles, values and belief differences, capitalize on one another's strengths and affirm one another's gifts and talents.	<input type="checkbox"/>	<input type="checkbox"/>
f. Our team(s) have effective meetings, use their time wisely, start and finish on time, and have a circulated prioritized agenda in advance of each meeting.	<input type="checkbox"/>	<input type="checkbox"/>
g. Each meeting produces a useful set of brief, easily-read action minutes that outline the responsibilities and performance schedules of each team member.	<input type="checkbox"/>	<input type="checkbox"/>
h. Each team communicates well with other teams so that our organization's leaders are kept up to date about how each team is contributing to the implementation of the strategic plan.	<input type="checkbox"/>	<input type="checkbox"/>
i. All team leaders receive ongoing training and coaching that moves them toward becoming high performance team leaders. They understand and practice group leadership skills, and can teach others to use these skills effectively.	<input type="checkbox"/>	<input type="checkbox"/>
j. All team leaders meet effectively and regularly to report to executive leadership on their team's implementation of the strategic plan, correct course, appreciate one another and celebrate successes.	<input type="checkbox"/>	<input type="checkbox"/>

COLUMN TOTALS

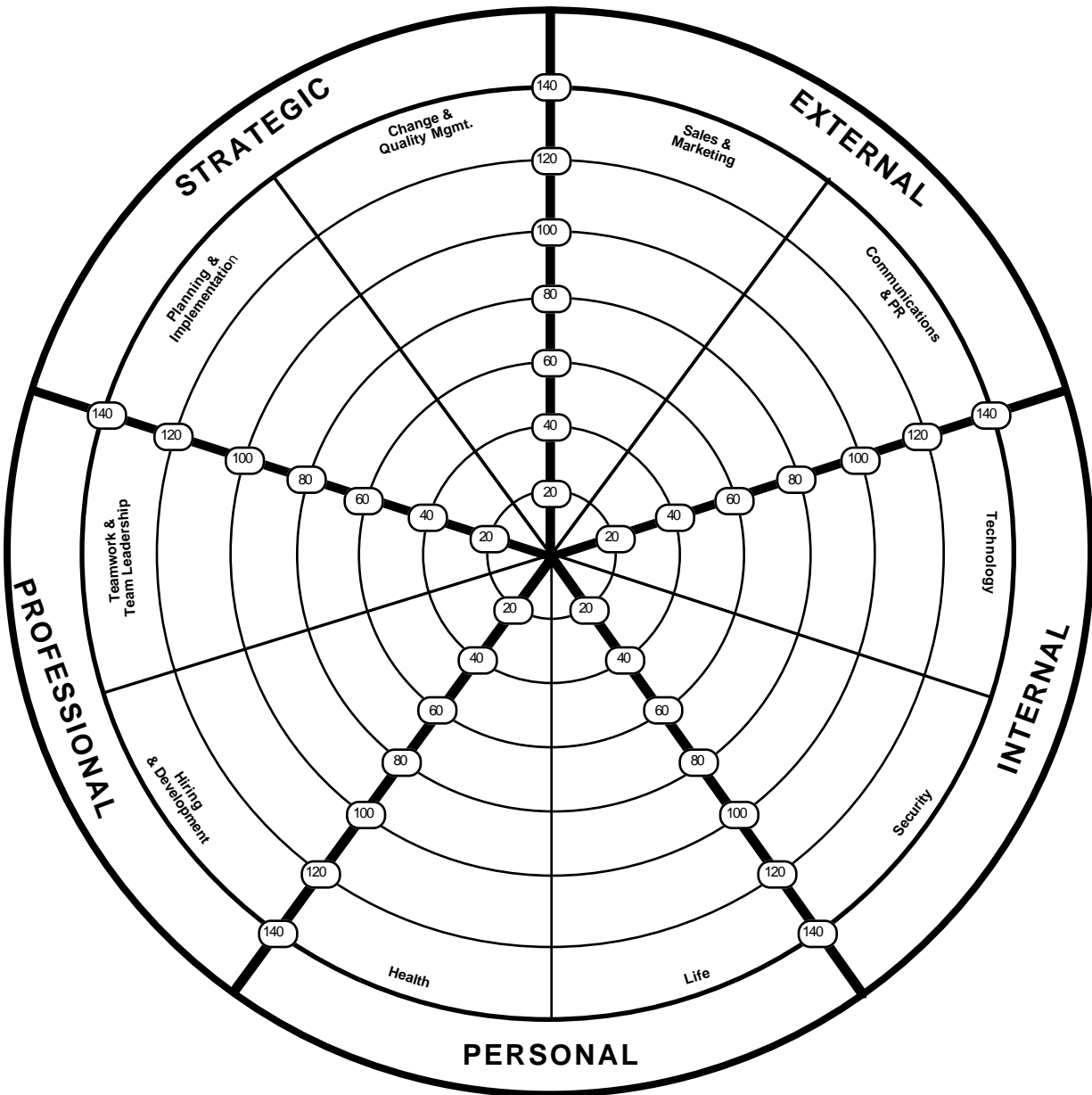
<input style="width: 50px; height: 40px; border: 2px solid black;" type="checkbox"/>	<input style="width: 50px; height: 40px; border: 2px solid black;" type="checkbox"/>
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Are there any particular strengths or weaknesses about this area that you would like to note as input to the assessment and evaluation process?

III. TOTALLING YOUR COMPANY SCORES

A. <i>STRATEGIC:</i>	Assessment Scoring	Urgency Scoring
1. Planning and Implementation	<input type="radio"/>	<input type="radio"/>
2. Change and Quality Management	<input type="radio"/>	<input type="radio"/>
B. <i>EXTERNAL:</i>		
3. Sales and Marketing	<input type="radio"/>	<input type="radio"/>
4. Communications and Public Relations	<input type="radio"/>	<input type="radio"/>
C. <i>INTERNAL:</i>		
5. Technology	<input type="radio"/>	<input type="radio"/>
6. Security	<input type="radio"/>	<input type="radio"/>
E. <i>PERSONAL:</i>		
7. Life	<input type="radio"/>	<input type="radio"/>
8. Health	<input type="radio"/>	<input type="radio"/>
B. <i>PROFESSIONAL:</i>		
9. Hiring and Development	<input type="radio"/>	<input type="radio"/>
10. Teamwork and Team Leadership	<input type="radio"/>	<input type="radio"/>
TOTALS:	<input type="text"/>	<input type="text"/>

IV. GRAPHING YOUR SCORES



Plot your assessment and urgency scores and connect the dots. Use a separate color ink to plot the urgency scores. The urgency scores help interpret/weigh the results of the ratings given to each assessment area.

V. WHERE ARE YOUR "SPIKES" AND "FLATS"?

<p>A. Our strongest OAR Assessment area is _____ Why? _____ _____ _____</p>
<p>B. Our lowest OAR Assessment area is _____ Why? _____ _____ _____</p>
<p>C. Our next lowest OAR Assessment area is _____ Why? _____ _____ _____</p>
<p>D. Our third lowest OAR Assessment area is _____ Why? _____ _____ _____</p>

VI. WHAT ARE YOUR NEXT STEPS?

A. First, _____

Why? _____

When? _____

B. Next? _____

Why? _____

When? _____

C. Third? _____

Why? _____

When? _____