



Coach: Todd Masters
www.toddmastersfocalpointcoaching.com
tmasters@focalpointcoaching.com
678-822-1691

Strategic Planning Assessment:

One day Alice came to a fork in the road and saw a Cheshire cat in a tree. "Which road do I take?" she asked. "Where do you want to go?" was his response. "I don't know," Alice answered. "Then", said the cat, "it doesn't matter."

Alice in Wonderland, Author [Lewis Carroll](#)

Honestly and objectively assessing your business provides the necessary information to answer the question, "Where do you want to go?" Knowing where your business stands currently compared to the vision of where you want it to be is the clarity needed to reach your desired potential.

To get the most out of this strategic analysis, follow these steps:

1. Read each strategic category statement and give a grade of 1- 10, worst to best, in each area. 10 is best.
 2. Compile your assessment scores to obtain an "average" snapshot of your business today.
 3. Identify your strongest and weakest areas and think about how these impact your success.
 4. Use the Strategic Planning Questionnaire to obtain further information to assist in your assessments. The Questionnaire will be also be used to facilitate discussion in the actual Strategic Planning Session.
 5. When you have completed the assessment, e-mail your results to:
Todd Masters, FocalPoint Business Coach
Email: tmasters@focalpointcoaching.com
Your responses will be treated confidentially.
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Strategic Assessment #1: Purpose

Statement: The Purpose of MY COMPANY, Inc. is well defined and understood.

Why was MY COMPANY, INC. formed? Why does MY COMPANY, INC. exist?
What difference is MY COMPANY, INC. trying to make in the lives of its clients?
An institution's Purpose appeals to the heart and constitutes its emotional engine.

Assessment #1	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #2: Core and Strategic Values

Statement: The Core and Strategic Values of MY COMPANY, Inc. are well defined and drive our business activities.

A listing of Core and Strategic values is attached.

Assessment #2	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #3: Core Competency

Statement #3: MY COMPANY, INC.'s Core Competency is well defined and understood.

Any institution, department or employee has many skill sets, but one – its Core Competency – stands out above all others. Its Core Competency is one organizing principle around which a business or institution is built.

Assessment #3	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #4: Business Definition

Statement: We are easily able to answer the question when we are asked, “What business is MY COMPANY, Inc. in?”

Your business must be defined in terms of the benefit or improvement your clients enjoy when they utilize your services. What real benefit do you provide? Has this changed over the years?

Assessment #4	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #5 Core Product/Service

Statement: We know our Core Product and Service

A company must know what their core product or service, “is” as well as what it “does” to benefit the customer.

Assessment #5	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #6: Ideal Client

Statement: MY COMPANY, Inc. knows the characteristics of its “Ideal” client(s).

Successful companies know the demographic and psychographic characteristics of their ideal clients. This knowledge is essential in keeping and attracting good clients.

Assessment #6	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #7: Client Value Proposition

Statement: MY COMPANY, Inc. has a good understanding of the “value assumption” the ideal client is making when they retain our services.

It is important to understand the basis upon which a client makes his or her decision to utilize your services. What is the client expecting us to deliver to them for the payment made to us? What are they hoping to gain?

Assessment #7	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #8: Our Competition

Statement: MY COMPANY, Inc. is familiar with its competitors, both direct and indirect.

In today's competitive environment there are other firms providing your products and services. Potential clients can choose to use them. Additionally, there are other firms that "compete" for your clients' dollars by offering similar, related or complimentary products or services.

Assessment #8	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #9: Our Competitive Advantage

Statement: MY COMPANY, Inc. has clearly differentiated itself from its competitors with unique competitive advantages

Successful companies find ways that separate them from their competitors in terms of products, services, value, benefits etc.

Assessment #9	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #10: Our Mission

Statement: MY COMPANY, INC.'s Mission is a clear statement of what it does, by drawing on its Core Competency and in alignment with its Core Values, in order to conduct its defined Business.

Assessment #10	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #11: Our Three to Five Year Vision

Statement: MY COMPANY, Inc. has a clear vision and direction of where it wants to be and what it should look like in three to five years

A clear "ideal" Vision acts as a magnet, drawing the institution toward it and inspiring its stakeholders to strive mightily for its achievement. Your Vision becomes the focal point of all future actions. If we could wave a magic wand, what would MY COMPANY, Inc. look like in three to five years?

Assessment #11	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #12: Critical Constraints

Statement: MY COMPANY, Inc. has anticipated and understands the things that could hold it back from achieving its vision and goals.

Your chances of successfully creating your Vision will be greatly enhanced by anticipating your critical constraints and devising plans to overcome them well in advance of their actual occurrence.

Assessment #12	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #13: Strategy

Statement: MY COMPANY, Inc. has developed a clear strategy for achieving its three to five year vision

Successful companies use strategies, to develop tactics and then action plans to achieve their goals. What is our strategy?

Assessment #13	Grade:	1	2	3	4	5	6	7	8	9	10
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Strategic Assessment #14: Responsibilities and Actions

Statement: Given my area of responsibility, I am clear on my priorities and which actions I can take that will have the greatest impact on achieving our goals

Each team member's responsibilities should support the strategy and vision of the organization. It is this "alignment" of activities toward a common and cohesive goal that is the trademark of a successful organization

Assessment #14	Grade:	1	2	3	4	5	6	7	8	9	10
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