**ORGANIZATIONAL HEALTH CHECKLIST**

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|  |  |
| COMPANY INFORMATION |
| Company name:  |  |
| Contact person:  |  |
| Contact info:  |  |

Please complete this Checklist so we can better understand your organizational and leadership needs.

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| --- | --- |
| YES | NO COMMENTS: |
| [ ]  | [ ]  | We have a clearly articulated the Core Values and Purpose statement. All employees know of these.  |  |
| [ ]  | [ ]  | All executives and middle managers refer back to the Core Values and Purpose when giving praise or reprimands.  |  |
| [ ]  | [ ]  | HR processes align with the Core Values and Purpose (hiring, orientation, appraisal, recognition, etc.) |  |
| [ ]  | [ ]  | Each individual/team has clearly defined quarterly goals. |  |
| [ ]  | [ ]  | Our company celebrates the accomplishment of these goals and rewards/acknowledges individual employees.  |  |
| [ ]  | [ ]  | We have a clearly articulated annual strategic plan with KPIs. |  |
| [ ]  | [ ]  | Employees can articulate the following aspects of the company’s strategy: Core Customer description, 3 Brand Promises, annual and quarterly goals.  |  |
| [ ]  | [ ]  | Communication processes are clear and information moves efficiently through the organization.  |  |
| [ ]  | [ ]  | All employees meet for a daily huddle that lasts no longer than 15 minutes. |  |
| [ ]  | [ ]  | All teams have a weekly meeting. |  |
| [ ]  | [ ]  | Senior executive and managers meet consistently for one day of continued education and addressing big issues. |  |
| [ ]  | [ ]  | We have a clear Succession Management process in place. |  |
| [ ]  | [ ]  | We have an effective Performance review system in place. |  |
| [ ]  | [ ]  | Employees receive frequent, consistent feedback and support on their performance. |  |
| [ ]  | [ ]  | We have a strong Talent Pipeline including a Talent Assessment & Development process.  |  |
| [ ]  | [ ]  | We have and utilize a Conflict Management protocol to address employee conflicts. |  |
| [ ]  | [ ]  | Our Executive/Leadership team regularly utilizes Executive Coaching services including 360 Assessments to improve leadership skills and competencies.  |  |
| [ ]  | [ ]  | Our upper-level management team is provided with training, Coaching and/or mentoring support to help develop critical management skills. |  |
| [ ]  | [ ]  | We provide Professional Development & Trainings for our staff (e.g. Management Skills, Team Effectiveness Skills, Emotional Intelligence, Stress Management). |  |
| [ ]  | [ ]  | We create a culture in which team members feel motivated, enthusiastic and connected to their work. |  |
| [ ]  | [ ]  | We create a psychologically safe culture in which team members are encouraged to openly discuss their perspective. |  |
| [ ]  | [ ]  | Our teams work in a collaborative, efficient and productive manner. |  |
| [ ]  | [ ]  | We have clearly defined roles and responsibilities in which designation of assigned responsibilities is based on knowledge and skills.  |  |
| [ ]  | [ ]  | Our Executive Team is healthy and aligned. Team members understand each other’s leadership strengths and weaknesses. Team members support each other leadership growth.  |  |
| [ ]  | [ ]  | Employee input is regularly collected to help identify obstacles and opportunities. |  |
| [ ]  | [ ]  | The primary Core Processes of the organization are clarified and a person is accountable for each one. |  |
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What are the 3 near-term priorities:

What are the 3 long-term objectives: