

STRATEGIC PLANNING LITE ASSESSMENT



Instructions

Strategic planning engages the collective wisdom and expertise of your team, fostering ownership and commitment to the organization's future. This tool is designed to help you evaluate the effectiveness and alignment of your strategic planning process. By reflecting on key areas, you can ensure that your efforts are focused, relevant, and engaging for your team.

Answer the below questions with the 5-point scale and choose the rating you agree with most for each question. Calculate your total score.

- 5=Strongly Agree
- 4=Somewhat Agree
- 3=Neutral
- 2=Somewhat Disagree
- 1=Strongly Disagree

1. I ensure my to-do list aligns with our strategic goals.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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2. I believe our current strategic planning process is effective in staying relevant and utilized.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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3. I communicate the purpose of strategic planning clearly within the organization.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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4. I am clear about our team's vision statement.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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5. My team's daily work is guided by the overarching organizational strategy.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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6. I believe our strategic plan is well-defined in terms of goals, initiatives, and timelines.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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7. I believe our team's mission statement is well-defined

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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8. I feel our core values guide decision-making in our team.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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9. I include key stakeholders and team members in the strategic planning process.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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10. I conduct SWOT and PESTLE analysis thoroughly before creating our strategic plan.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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11. My team consistently utilizes the created strategic plan.

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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12. My team regularly reviews and tracks progress on our strategic plan

1 Strongly Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Strongly Agree
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Answer Key

Calculate your total score from the questions above and find the corresponding category.

Score: 45-60 Visionary Architect

Your results indicate a highly effective strategic planning process. To maintain this success, focus on sustaining alignment and fostering innovation within your team. Regularly review and adjust your strategic priorities to ensure continued alignment with organizational goals. Encourage a culture of innovation by providing opportunities for team members to explore new ideas and approaches. Additionally, continue to emphasize the importance of regular reviews and adaptability to ensure ongoing success in an ever-changing business environment. By prioritizing alignment and innovation, you can continue to drive your organization forward with confidence.

Score: 30-44 Strategic Connector

Your results suggest a fairly effective strategic planning process with room for enhancement in team engagement and communication clarity. To improve team engagement, focus on fostering a collaborative environment where team members feel valued and encouraged to contribute their ideas. Hold regular strategy sessions and seek input from diverse perspectives to enhance decision-making. Additionally, ensure that communication channels are clear and open, with all team members fully understanding the strategic plan's purpose and objectives. By prioritizing engagement and communication, you can further enhance the effectiveness of your strategic planning efforts.

Score: Less than 29 Alignment Explorer

Your results indicate areas for improvement in aligning daily tasks with strategic goals and conducting thorough analyses. To enhance alignment, focus on clearly defining your strategic goals and regularly reassessing your to-do lists to ensure they support these objectives. Additionally, invest more time in conducting comprehensive SWOT and PESTLE analyses to gain deeper insights into your organization's internal and external factors. By prioritizing alignment and analysis, you can strengthen your strategic planning process and drive more impactful outcomes.

This assessment encompasses four key strategies: Finding the Focus, Do-It-Yourself Strategic Planning, Setting the Stage and Clarifying Vision, Mission & Values.

Finding the Focus (Questions 1 & 5): I ensure my to-do list aligns with our strategic goals. My team's daily work is guided by the overarching organizational strategy.

Do-It-Yourself Strategic Planning (Questions 2 & 11): I believe our current strategic planning process is effective in staying relevant and utilized. My team consistently utilizes the created strategic plan.

Setting the Stage (Questions 3, 6, 9 & 10): I communicate the purpose of strategic planning clearly within the organization. I believe our strategic plan is well-defined in terms of goals, initiatives, and timelines. I include key stakeholders and team members in the strategic planning process. I conduct SWOT and PESTLE analysis thoroughly before creating our strategic plan.

Clarifying Vision, Mission & Values (Questions 4, 7, 8, 12): I am clear about our team's vision statement. I believe our team's mission statement is well-defined. I feel our core values guide decision-making in our team. My team regularly reviews and tracks progress on our strategic plan.