

www.BPIR.com self-assessment tools

Strategic Planning Self-assessment

Source: Beyond Training and Development, William J. Rothwell, 2005.

Excerpted from *Beyond Training and Development* by William J. Rothwell. Copyright © 2005 Williams J. Rothwell. Published by AMACOM Books, www.amacombooks.org, a division of American Management Association, New York, NY.

How the self-assessment can help BPIR members...

This self-assessment aims to assess the strengths and weaknesses of an organization's strategic planning process. It helps to examine how effective communication is between employees and decision-makers; whether the company's reporting relationships match the strategy; rewards are tied to desired results; and strategy is evaluated after it's implemented.

Self-assessment

For each step in strategic planning listed in the left column, rate the effectiveness of the step as it currently exists.	Very Ineffective	Ineffective	Somewhat Ineffective	Somewhat Effective	Effective	Very Effective
1. Established a clear mission statement of why the organization exists and what it should be doing?	1	2	3	4	5	6
2. Formulated clear, specific goals and measurable objectives that are logically derived from the organization's mission?	1	2	3	4	5	6
3. Identified and addressed future threats and opportunities resulting from external environmental change?	1	2	3	4	5	6
4. Identified and addressed the organization's present strengths and weaknesses?	1	2	3	4	5	6
5. Considered possible grand strategies to guide the organization?	1	2	3	4	5	6
6. Selected a realistic, optimal grand strategy, given the constraints within which the organization must operate?	1	2	3	4	5	6
7. The organization's reporting relationships (structure) match the strategy?	1	2	3	4	5	6
8. Appropriate leaders have been identified and empowered based on the competencies necessary to make the strategy successful?	1	2	3	4	5	6
9. Appropriate rewards have been tied to desired results?	1	2	3	4	5	6
10. Appropriate policies have been formulated (or revised) so that internal coordination exists across divisions, departments, work groups or teams, and individuals?	1	2	3	4	5	6
11. The strategy is effectively communicated to employees and other relevant groups?	1	2	3	4	5	6
12. Established a means by which to evaluate the strategy before, during, and after implementation?	1	2	3	4	5	6

Recommendation

Identify those questions for which your organisation scores less points and take action to improve your strategic planning process.