

## Strategic Planning Process

Consider to what extent your organization executes on these best practices and check the appropriate box. When finished, add the points by column, by total and then compare to the corresponding scale to determine your organization's competency and effectiveness.

	Strongly Agree	Agree	Slightly Agree	Disagree	Strongly Disagree
We conduct annual planning at an offsite location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All members of the leadership team attend the meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We review the previous year's plan vs. results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We define what worked/what went wrong	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We review all systems/processes for improvements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Each individual unit/manager has a defined plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Each plan integrates with the firm's	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We create measurements within the plan(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We share the results of the plan with the entire firm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We support and conduct annual planning w/Associates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Each Associate's plan integrates with the unit/manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We share a formalized planning process with tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We incorporate measurements in the Associates plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We regularly review the firm's strategic plan for progress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We make timely adjustments to the plan as necessary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All plans incorporate personal and professional goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We provide tactical support for the Associate's plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We use the plans in coaching one on one meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have a culture of strategic planning in the firm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All new Associates must complete a business plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Total of each check mark by individual column:</b>					
<b>Multiple each column's total by its factor:</b>	<b>X 5</b>	<b>X 4</b>	<b>X 3</b>	<b>X 2</b>	<b>X 1</b>
<b>Add-up each column's Score to get at your final Score:</b>	+	+	+	+	
<b>Total firm's strategic planning score:</b>					

**Score Key:**

- 100-90 = Principles are well defined and executed
- 89-75 = Execution is above average
- 74-55 = Average execution
- 54-30 = Extensive work needs to be done to get better
- 29-0 = Your firm lacks the foundational principles of leadership