

## Strategic Planning Assessment

Pivot Performance has prepared an easy-to-use Strategic Planning Assessment to evaluate the completeness of your organization’s strategic plan and strategic planning process. Each section begins with a question and is then followed by a more detailed description. If your answer is “yes” to the question, count one point. If your approach to strategic planning response matches the description in each section, you can count two points. If you are unable to provide any response, do not count any points. Only check off one column per row.

Strategic Steps or Roles	Description	Complete (2)	Could be improved (1)	Does not exist (0)
1. Environmental Scan	Do you regularly conduct an Environmental Scan? In other words, do you have a systematic approach to understanding what is going in the environment in which you do business?			
2. Mission	Do you have a Mission statement? A Mission statement describes the fundamental reason your organization exists. It should describe what you do, for whom and why. A Mission statement is not a tag line.			
3. Vision	Do you have a Vision statement? A Vision describes what the organization aspires to become. It’s a statement that describes how the future will look if the organization fulfills its mission. It should be exciting, inspiring and a little scary.			
4. Values or Guiding Principles	Do you have Values or Guiding Principles? Values or Guiding Principles describe the behaviours and beliefs of the organization and its employees.			

Strategic Steps or Roles	Description	Complete (2)	Could be improved (1)	Does not exist (0)
5. Strategic Goals	Do you have at least one Strategic Goal and no more than five? The Strategic Goals describe the focus the organization is trying to achieve. The Strategic Goals describe tangible outcomes of the focus created. Strategic Goals will be achieved over the strategic planning timeframe and as such, new goals will be added.			
6. Objectives	Do each of your Strategic Goals have at least three and no more than five Objectives? Objectives are specific, quantifiable, realistic targets that measure the accomplishment of a goal over a specified period.			
7. Measures	Do you have a clear Measure for each Objective? Measures are the tool or method that will be used to evaluate the objective.			
8. Targets	Have you set clear Targets for each Objective? Targets are the projected results you would like to achieve to meet your goals. A Baseline is the starting point. There may be occasions where the organization may not have baseline information, you can choose to use industry data until you establish an internal baseline, after which you can set targets.			
9. Strategies	Do you have Strategies? Different than the Goals, the Strategies are the broad activities required to achieve an objective, create a critical condition, or overcome a barrier. One strategy may help achieve more than one goal. You may have multiple strategies; however, they should be prioritized, on a timeline and with an action plan.			
10. Key Performance Indicators	Do you have Key Performance Indicators (KPIs)? KPI's are indicators that are measured regularly in the organization to provide a score on elements deemed important to organizational success. KPI's tend to be more operational than Objectives.			

Strategic Steps or Roles	Description	Complete (2)	Could be improved (1)	Does not exist (0)
11. Action Plan	Do you have a detailed Action Plan? An action plan is a detailed list of activities required to complete each strategy. It should identify the person responsible for completing the action, a start and/or end date,			
12. Communication Plan	Do you have a Communication Plan? A communication plan helps you share the information contained in the strategic plan with the right people at the right time. Like the Action Plan it should be detailed.			
13. Strategic Planning Sponsor	Do you have someone who promotes the importance of strategic planning in the organization? This Strategic Planning Sponsor is often the CEO of the company and believes in the importance of strategic plan.			
14. Strategic Planning Coordinator	Do you have someone who is scheduling the meetings, making sure the notes are taken, the plans are updated regularly? The Strategic Planning Coordinator acts as the project manager for the strategic plan.			
15. Strategy Leader	Does each strategy have a Strategy Leader? The Strategy Leader is responsible for developing a detailed action plan for the strategy. The leader is responsible for delegating tasks to the Strategy Team.			
16. Strategic Plan and Budget are Aligned	Are your strategic plan and budget aligned? If a strategy requires investment of time, money and resources, these should to be reflected in the budget.			

Strategic Steps or Roles	Description	Complete (2)	Could be improved (1)	Does not exist (0)
17. Monthly Planning Meeting	<p>Do your Strategy Leaders meet once a month to review their progress and keep each other accountable?</p> <p>The meeting need not be long, but the Strategy Leaders should be meeting regularly to review the progress on the action plan and make changes where required.</p>			
18. Quarterly Planning Meeting	<p>Do your Strategy Leaders meet once a quarter to review their progress and keep each other accountable?</p> <p>Different than the monthly meeting, the quarterly meeting is meant to review the entire quarter that passed and make any required adjustments to upcoming quarter. The team should be meeting at least three times throughout the year. The meeting is likely a two-four-hour meeting.</p>			
19. Annual Planning Retreat	<p>Do your Strategy Leaders and Leadership Team meet once a year to review the entire year and plan for the upcoming year?</p> <p>Different than the monthly and quarterly meetings, the annual planning meeting is meant to review the entire year and make any adjustments to strategic plan for the upcoming year. The meeting should be off-site for at least one day.</p>			
20. Three Year Planning Retreat	<p>Do you regularly meet with your leadership team to review the entire strategic plan?</p> <p>Different than the annual planning retreat, the three-year planning retreat is meant to clear the set and refocus for the future. The meeting should be off-site for at least two-days.</p>			

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21. Glossary of Terms	Have you included a Glossary of Terms used in your strategic planning document? The Glossary helps to remind people how you have defined the terms.			
	SUB - TOTAL			
	TOTAL			

### What does your score mean?

- 20 points or less – Your strategic planning process needs some attention. Your organization has a lot of opportunity for improvement. It is proven that what gets measured gets done.
- 21 – 30 points – Congratulations you on the road to success. Although it was stated that what gets measured, gets done. A well-developed strategic plan strengthens the chance that you are also making sure the right things are getting done. Keep working it at, although you have scored high, there is still room for improvement.
- 30 points or more – You are moving at a fast pace, success is common and you are hungry for more. You are likely seeking ways to celebrate continued success. Don't be fooled, a high score isn't the only measure of success, make sure your strategic plan is delivering the results you set out to achieve. Don't just go through motions, make them meaningful.

Still have more questions about your approach to Strategic Planning?

Sign up for our newsletter or contact us for a [free consultation](#).