

Haines Centre's 25 Best Practices *in the* Strategic Management Yearly Cycle *and* System

Strategic Management = Planning, People, Leadership and Change to Deliver Customer Value

Instructions: Read this page and fill in the blanks below.

1. Today's date: _____
2. Organization: _____
3. Do not ponder over the questions; answer with your first instincts.
4. Return confidentially and anonymously to:

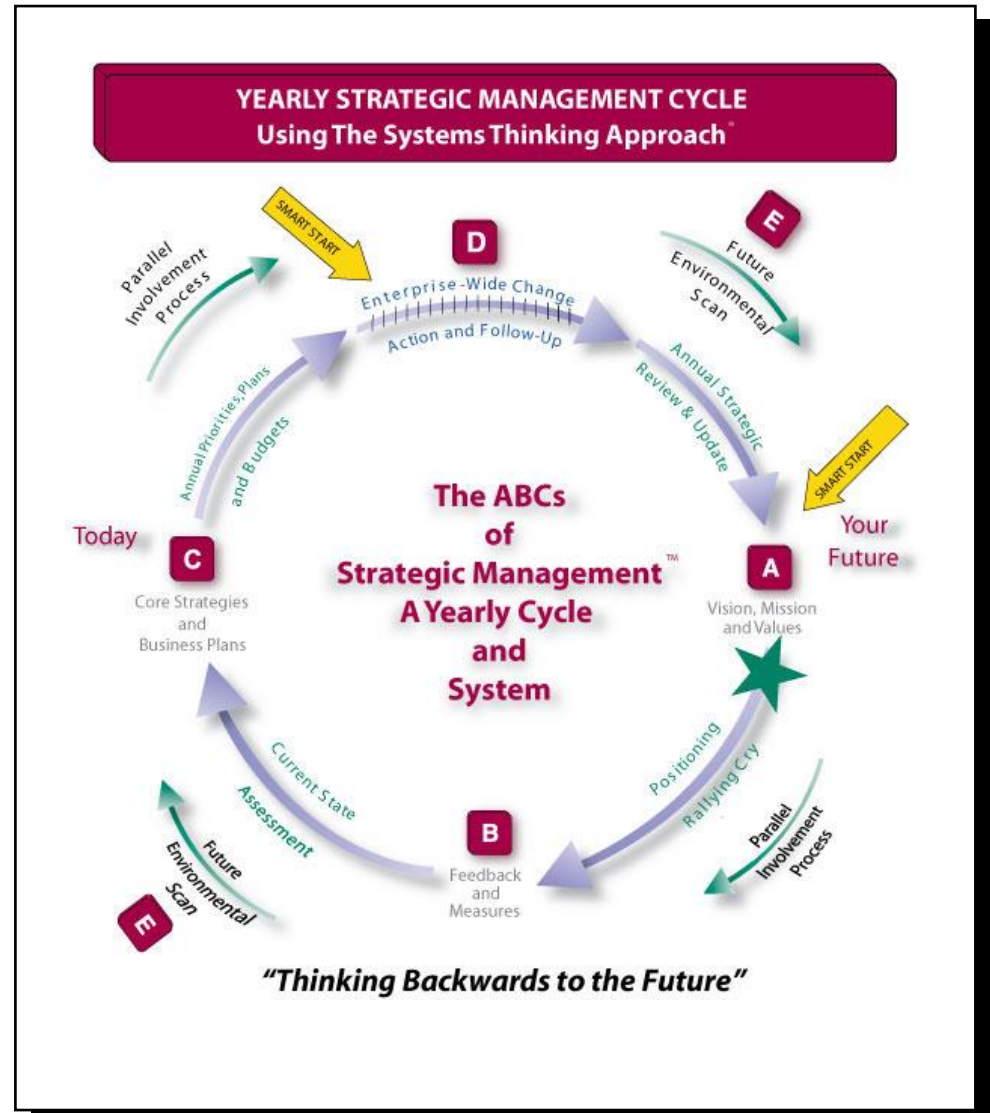
at:

by:

5. Your scores will be used to tally the averages for each question. Your name will not be identified. However, if you want this instrument back, either put your name or some other code only you know here:

6. We do require some demographic data please check.

A. Senior Management	_____
B. Middle Management	_____
C. First Line Management	_____
D. Non-Management-Exempt	_____
E. Non-exempt	_____
F. Not in the Organization	_____



HAINES CENTRE ASSESSMENTS

	Haines Centre System	Your Planning/ Change System	Other Consulting Firm	Other Consulting Firm	Other Consulting Firm
	YES/NO				
SMART START: Plan-to-Plan					
1. Do you use an integrated and holistic Systems Thinking framework to align your entire organization together?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
2. Do you have a comprehensive <i>Yearly Strategic Management System and Cycle</i> as the new 21 st Century way to run your business, day-day, week-week, month-month and year-year?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
3. Do you have a Strategic IQ Audit conducted each year to ensure your strategic direction is being achieved?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
4. Does your organization have a <i>Plan-to-Plan</i> day to ensure you organize and tailor your Strategic Planning/Strategic Change process before you begin to engineer success?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
5. Do you conduct an Executive Briefing to educate everyone on Strategic Management and assess your critical issues before you begin?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
FUTURE ENVIRONMENTAL SCAN					
E 6. Do you regularly conduct a <i>Future Environment Scan</i> using the <i>SKEPTIC</i> Concept as a way to begin your planning?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
E 7. Is a <i>Future Environmental Scan</i> System installed with eight Change Agent Teams to do the scanning (one per <i>SKEPTIC</i> letter) led by a senior executive for each one?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
E 8. Is the <i>Future Environmental Scan</i> and it's backwards thinking implications for today defined first, instead of the usual "OT (Opportunities and Threats)" of a SWOT of today only?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
IDEAL FUTURE					
A 9. Are both your Vision and Mission clear, detailed and specific so as to be useful and practical?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
A 10. Do you have a clear and specific value-added Marketplace Positioning identified to build your competitive advantage?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
A 11. Do you have a clear & concise set of Core Values that represent your desired organizational culture?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
GOALS/KEY SUCCESS MEASURES					
B 12. Does your organization have Multi-Year Key Success Measures/Goals of your desired outcomes in terms of Finances-Customers-Employees and Society?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
B 13. Does your organization have a Multi-Year Matrix for Key Success Measures or Goals along with a tracking and reporting system each month/each year to ensure achievement of success?	Yes	Yes/No	Yes/No	Yes/No	Yes/No

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CURRENT STATE ASSESSMENT					
C 14. Do you conduct an in depth Enterprise-Wide Assessment (built on the Baldrige Criteria for Performance Excellence) instead of the surface level SW (Strengths & Weaknesses) traditional SWOT?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
C 15. Are a set of Corporate-Wide Core Strategies & Annual Priorities developed with clear accountability and timeframes and shared with all employees?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
C 16. Are Annual Department Work Plans developed with an integrative “Who Else to Involve” column and based on ALL departments using your Core Strategies as their Department Goals?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
C 17. (<i>People support what they help create</i>): Does your organization have a <i>Parallel Involvement Process</i> to involve all key stakeholders so your strategic plan has ownership and buy in before it is finalized?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
C 18. Are simple four-page <i>Performance Appraisal Forms</i> used to focus, clarify and unify accountability for each person so everyone is aligned with your Core Strategies, Core Values and a Career Development plan?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
C 19. Does your organization hold large group (senior and middle management) Annual Review Meetings to review all department work plans and your Annual Priorities in #15 above?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
IMPLEMENTATION AND CHANGE					
D 20. Does your organization hold a Plan-to-Implement Day to ensure you have educated, assessed, organized and tailored your ability and capacity to lead the Strategic Change required to implement your strategic plan successfully?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
D 21. Does your organization have a specific Culture Change Game Plan that includes a set of Core Strategies and Action Priorities to achieve the Culture Change?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
D 22. Is your Strategic Plan clarified and simplified through a one to two page simple publication that is given out and used everywhere for communications clarity?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
D 23. Does your organization have Monthly Change Leadership Team Meetings led by the CEO to guide overall implementation?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
D 24. Is a mental <i>Strategic Thinking Framework</i> used as a standard for a holistic and integrated guide for problem solving, decision making, project management and issues resolution on a daily basis, organization wide?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
D 25. Is a <i>Yearly Map of Implementation/Calendar</i> used to guide the processes and structures of change in your organization all year long with specific dates set in advance for all key Planning/Change events/meetings?	Yes	Yes/No	Yes/No	Yes/No	Yes/No
	TOTAL NUMBER OF YES ANSWERS				
	25				

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SCORE SHEET

		Scores
Smart Start – Plan to Plan	/5=	
<input type="checkbox"/> Future Environmental Scan	/3=	
<input type="checkbox"/> Ideal Future	/3=	
<input type="checkbox"/> Goals/Key Success Measures	/2=	
<input type="checkbox"/> Current State Assessment	/6=	
<input type="checkbox"/> Implementation and Change	/6=	
Grand Total	/25=	

Circle where you fit in A-D:

- A. 20-25 points Doing excellent in Strategic Management, congratulations, keep it up with continuous improvement!
- B. 15-19 points Doing average in Strategic Management, but need major improvement.
- C. 10-14 points A critical need for improvement in Strategic Management; get a serious Change Management Game Plan and Program Management office now!
- D. 0-9 points A critical need for survival-overhaul your organization and leadership immediately.

ACTION PLAN			
Where did we score our greatest improvement needs in Strategic Management?	How do we begin improving?	Lead?	By when?

Where are we performing best in Strategic Management?	Why?