



Strategic Plan

Opportunity Self-Assessment

	Innocence	1	2	3	4	5	Excellence
1	The organization's Strategic Plan (SP) is old, of questionable value or non-existent.	1	2	3	4	5	The organization's SP is relevant, current, updated every couple of years & includes specific objectives with associated timelines.
2	The organization's Strategic Plan (SP) is vague and nebulous, primarily academic document.	1	2	3	4	5	Metrics measuring progress towards strategic objectives are in place and are recorded regularly.
3	Progress against the Strategic Plans is rarely assessed.	1	2	3	4	5	Metrics related to strategic objectives are compiled and reported throughout the organization at least quarterly.
4	The SP was developed primarily by external personnel with little input from the organization's various stakeholders.	1	2	3	4	5	SP was developed primarily by management team but reflects stakeholder's input. (suppliers, customers, employees, etc.)
5	The SWOT analysis is seen primarily as an element of corporate propaganda, summarizing the lies we tell ourselves.	1	2	3	4	5	The SP documents a candid analysis of the organization's strengths, weaknesses, opportunities and threats (SWOT)
6	The SWOT analysis is seen primarily as an element of corporate propaganda.	1	2	3	4	5	The SWOT analysis has been critiqued by various stakeholders to mitigate group think or self-delusion.
7	The organization's SP sits on a shelf or hard-drive somewhere and few people know what it says.	1	2	3	4	5	The goals expressed within the SP are well known throughout the entire organization & external stakeholders as appropriate.
8	Most of our people really don't understand or agree with why we need to succeed in reaching our strategic objectives.	1	2	3	4	5	The underlying need for the various strategic objectives is widely understood and accepted.
9	For the most part our SP isn't something we think about on a regular basis.	1	2	3	4	5	Sufficient resources (money, personnel, etc.) have been allocated to achieve the strategic objectives in a timely manner.
10	Implementing the Strategic Plan really relates only to the efforts of our top management.	1	2	3	4	5	Incentives are in place providing widespread rewards for achieving the organization's SP in a timely fashion.

Scoring Methodology: Add-up the total score of your self-assessment (circled scores).

- If you scored; 10 - 20 - Substantial opportunity for improvement
- If you scored; 21 - 30 - Significant opportunity for improvement
- If you scored; 31 - 40 - Multiple areas of opportunity for improvement
- If you scored; 41 - 50 -Congratulations. You are an effectively managing your strategic projects.