

# Strategic Management Assessment

This is a tool for assessing the capacity of an organization for strategic management. It assumes that there has been a presentation or reading on strategic management.

## A. The Organization's Overall Situation

1. The degree to which the organization is aware of being impacted by changes in its environment.

|     |   |   |   |      |
|-----|---|---|---|------|
| LOW |   |   |   | HIGH |
| 1   | 2 | 3 | 4 |      |

2. How well we are adapting and transforming ourselves to cope with environmental changes.

|        |   |   |   |      |
|--------|---|---|---|------|
| POORLY |   |   |   | WELL |
| 1      | 2 | 3 | 4 |      |

3. The extent to which we are caught up in small, maintenance matters; having difficulty responding to new opportunities, little vision.

|     |   |   |   |      |
|-----|---|---|---|------|
| LOW |   |   |   | HIGH |
| 1   | 2 | 3 | 4 |      |

4. The extent of behavior that shows denial, stress, low or fragmented energy, a fear-blame cycle.

|     |   |   |   |      |
|-----|---|---|---|------|
| LOW |   |   |   | HIGH |
| 1   | 2 | 3 | 4 |      |

5. We make adequate time for strategic matters while also managing pressing problems, crises, our routine work.

|          |   |   |   |           |
|----------|---|---|---|-----------|
| NOT WELL |   |   |   | VERY WELL |
| 1        | 2 | 3 | 4 |           |

6. A good bit of energy in this organization is given in trying to satisfy complaints and cope with the memos, reports, and minor issues that are generated internally.

|          |   |   |   |       |
|----------|---|---|---|-------|
| NOT MUCH |   |   |   | A LOT |
| 1        | 2 | 3 | 4 |       |

## B. Use of Methods for Strategic Management

1. Regular meetings focused on strategic issues

| NONE |   | ENOUGH |   |
|------|---|--------|---|
|      |   |        |   |
| 1    | 2 | 3      | 4 |

2. Use of an external organization development consultant

| NEVER |   | FREQUENT |   |
|-------|---|----------|---|
|       |   |          |   |
| 1     | 2 | 3        | 4 |

3. A clearly stated, public statement of values that guides us

|             |               |               |
|-------------|---------------|---------------|
|             |               |               |
| None Exists | It Needs Work | It Works Well |

4. To what extent does the form of strategic planning we use work for us.

| DOESN'T WORK |   | WORKS |   |
|--------------|---|-------|---|
|              |   |       |   |
| 1            | 2 | 3     | 4 |

- Our planning is most like: (circle)

- An unfolding vision process
- Linear planning
- Organic planning
- Short term or just program planning
- What planning?

### C. The Leader's Role

1. The leader has helped define and owns the vision.

|            |   |           |   |
|------------|---|-----------|---|
| Not at All |   | Very Much |   |
| 1          | 2 | 3         | 4 |

2. The leader keeps the vision, the primary task and the organization's values in front of staff/members/board.

|       |   |          |   |
|-------|---|----------|---|
| Never |   | Frequent |   |
| 1     | 2 | 3        | 4 |

3. The leader protect and maintains our ability to focus on strategic issues.

|            |   |           |   |
|------------|---|-----------|---|
| Not at All |   | Very Much |   |
| 1          | 2 | 3         | 4 |

4. The leader provides ways for the organization to "listen" to the environment (those we serve, those that seek something from us, etc.)

|            |   |                    |   |
|------------|---|--------------------|---|
| Not at All |   | Frequent & Regular |   |
| 1          | 2 | 3                  | 4 |

5. The leader takes action to mobilize resources around strategic goals.

|            |   |           |   |
|------------|---|-----------|---|
| Not at All |   | Very Much |   |
| 1          | 2 | 3         | 4 |

6. The leader resources herself or himself as a leader (i.e., draws on other's skills to keep perspective, stay open to new ways, etc.)

|            |   |           |   |
|------------|---|-----------|---|
| Not at All |   | Very Much |   |
| 1          | 2 | 3         | 4 |

### D. Summary and Action Plan

1. In light of the above assessment, my summary is (priorities) –

| <b>What I like about our strategic management</b> | <b>What concerns me</b> | <b>What I wish we would do differently</b> |
|---|-------------------------|--|
|   |                         |  |

2. The steps we need to take to improve the situation are .....

3. What I need to do to improve the situation is .....

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