

Organisation Assessment Example Business/Organisation Name

anthologycoaching.com



ANTHOLOGY COACHING

Table of Contents

Table of Contents	1
Introduction	2
Organisation Health Explained	3
Executive Summary	4
Summary Scores	5
Analysis	6
Business Health	7
Business Health Breakdown	8
Mission	9
Vision	9
Culture	10
Structure	10
Strategy	11
Operational Health	12
Operational Health Breakdown	13
Service & Product Delivery	14
Innovation & Development	14
Marketing	15
Sales	15
HR	16
Management Health	17
Management Health Breakdown	18
People Resources	19
Team Clarity	19
Engagement	20
Administration	20
Leadership	21
Department Review	22
Organisation Strengths & Weaknesses	23
Strengths	23
Weaknesses	24
End of Sample	25

Introduction

This report analyses the results from the recent assessment undertaken by key members of the organisation as identified by the business leader. The goal of this report is not just to learn where you are strong or weak, but to also provide information to move forwards in improving health for each area. These may be quick fixes, or they may not. Either way, improving health in one area will positively impact the overall health of the organisation. This report is presented in three parts:

- I. An [executive summary](#) of the report.
- II. An [analysis](#) of the results.
- III. A [strategic plan](#) of recommended steps to improve the overall health of the organisation.

Each assessment question, and overall rating for each area of organisation health, will be presented as a bar with a rating of 0% to 100%. The higher the percentage score, the healthier the area.



The findings are intended to kickstart conversations. I would recommend that as a team, you review this report before inviting an honest dialogue aimed at agreeing the next steps you will take to improve the health of your organisation.

Organisation Health Explained

There are fifteen areas, grouped together into three aspects, that all organisations, regardless of context, market or practice, need to be strong in to ensure overall health. These three aspects are:

Business Health is a measure of the organisations organisational focus on a clear purpose. In effect, it answers the question ‘how aligned towards our business aim are we?’

Operational Health is the measure of the organisation's internal and external operating strength. In effect, it answers the question ‘how successfully are we functioning as an organisation?’

Management Health is the measure of the organisation's leadership efficiency, in how it has developed five key factors that could be growth engines for the organisation - or potential caps to its development. In effect, it answers the question ‘how prepared are we to steward success?’

These three scores together give us the overall **Organisation Health**, which in effect answers the question ‘how healthy are we as a organisation?’

Executive Summary

The assessment results show that overall, the organisation has clear strengths but there are clear areas for improvement. Organisationally, operationally and managerially, I would recommend a review to increase health in each. This will benefit the organisation overall.

More detailed breakdowns of these three aspects scores are contained on the following pages.

Organisational Health: *How healthy are we as a organisation?*



68

Business Health: *How aligned towards our business aim are we?*



70

Operational Health: *How successfully are we functioning as an organisation?*



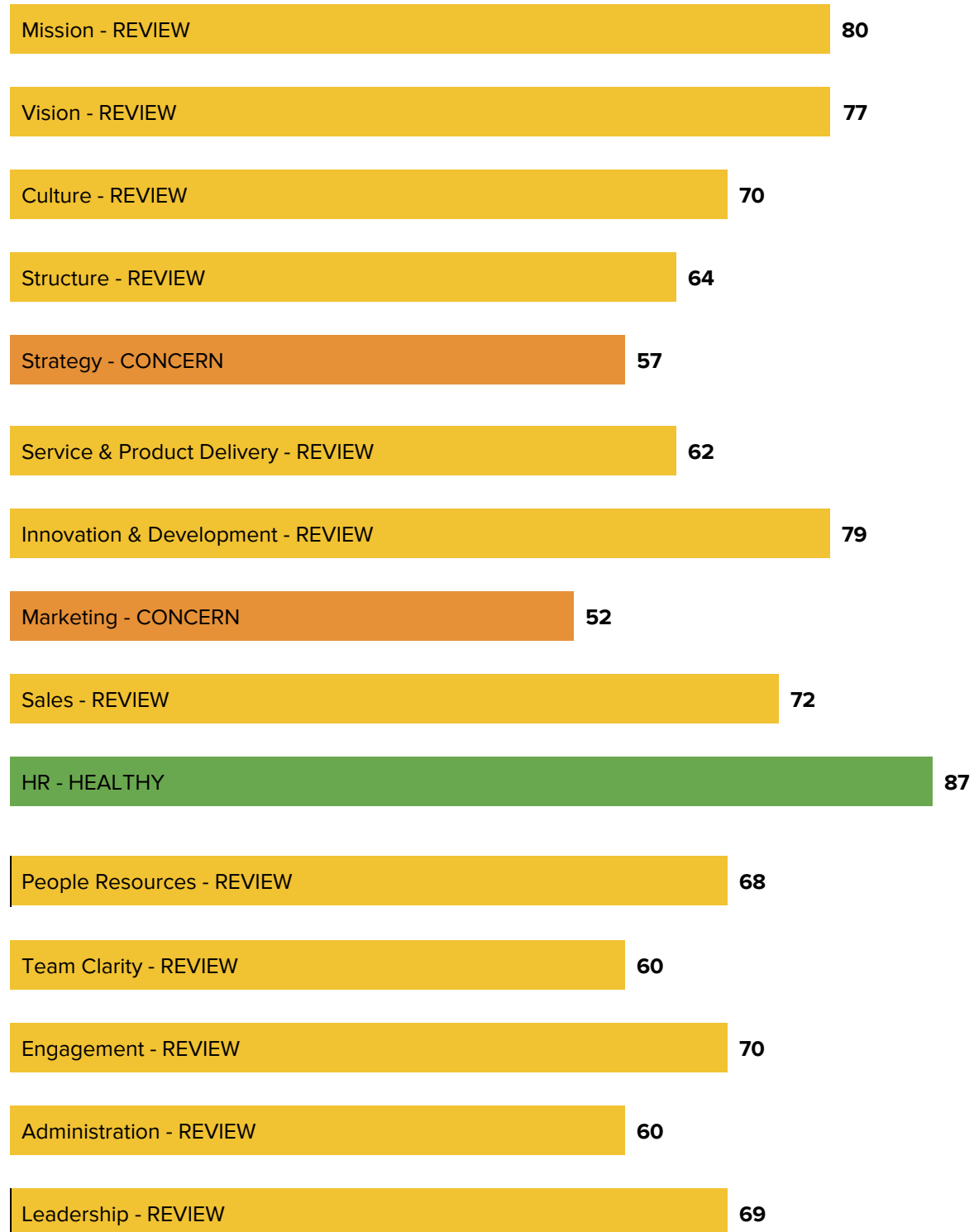
70

Managerial Health: *How prepared are we to steward success?*



65

Summary Scores



Analysis

The [analysis](#) of the results is presented as five assessments:

- I. Organisational Health
 - A. Mission
 - B. Vision
 - C. Culture
 - D. Structure
 - E. Strategy

- II. Business Health
 - A. Service & Product Delivery
 - B. Innovation & Development
 - C. Marketing
 - D. Sales
 - E. HR

- III. Leadership Health
 - A. People Resources
 - B. Team Clarity
 - C. Engagement
 - D. Administration
 - E. Leadership

- IV. Department Review

- V. Organisation Strengths & Weaknesses
 - A. Strengths
 - B. Weaknesses

Business Health

Business Health is a measure of the organisation's focus on a clear purpose. In effect, it answers the questions 'how aligned towards our business aim are we?' It can be measured by assessing five elements:

1. Mission
2. Vision
3. Culture
4. Structure
5. Strategy

Business Health: How aligned towards our business aim are we?



70

A low score indicates one or more of five things: an unclear mission, a vision that is not consistently mission-centric, a culture at odds with the vision, a structure that does not serve the vision, or a strategy that will not advance the mission of the organisation.

Overall, Example Organisation has areas needing review when it comes to its organisational health. Encouragingly, the organisation seems clear on its mission meaning it understands what it needs to do to see success.

The main way to increase the health of this area would be to work on ensuring a clear and relevant strategy is developed and implemented.

Business Health Breakdown

Mission: *Are we clear on what we need to do to see success?*



Vision: *Are we clear on what success looks like?*



Culture: *Are we effectively cultivating the beliefs needed to see success?*



Structure: *Are we building something that will help us see success?*



Strategy: *Do we have a clear and effective plan for success?*



Mission

Mission: *Are we clear on what we need to do to see success?*

80

The organisation mission clarifies its reason for existence. A low score could mean time, resources and energy will be wasted on endeavours not part of what the organisation primarily exists to do.

Overall, Example Organisation has areas needing review when it comes to its mission. Encouragingly, a clear mission statement has brought focus meaning the organisation is clear on what it needs to do to see success, and the team believe the mission influences what the organisation does.

The main way to increase the health of this area would be to ensure all staff are aware of the mission and how it shapes what the organisation does.

Vision

Vision: *Are we clear on what success looks like?*

77

The organisation vision provides a goal for business. A low score could mean there is be no target to aim for, or guiding picture of what success looks like.

Overall, Example Organisation has areas needing review when it comes to its vision. Encouragingly, there is a sense of excitement about where the organisation is headed, which is helped by the business leaders clarity on the vision.

The main way to increase the health of this area would be to ensure that the organisation has a clear vision statement, seen by all, that describes what the preferred or prophesied future of the organisation looks like.

Culture

Culture: *Are we effectively cultivating the beliefs needed to see success?*

70

The organisation culture reveals its corporate thinking. A low score could mean beliefs, preferences, attitudes and behaviours exist that may be counter-productive to the vision.

Overall, Example Organisation has areas needing review when it comes to its culture. Encouragingly, there is a sense that the Senior Leader embodies the core values of the organisation, modelling them well for staff.

The main way to increase the health of this area would be to develop cultural development plans for each core value, that seeks to teach and train all members in each core value so they become an authentic lifestyle.

Structure

Structure: *Are we building something that will help us see success?*

64

The organisation structure shows the focus of its activity and people. A low score could mean an inability to fully maximise the available resources, or that the organisation is process, people or structure-led instead of vision-led.

Overall, Example Organisation has areas needing review when it comes to its structure. Encouragingly, there is a consistency in the leadership team in terms of both time working together, and meeting frequency.

The main way to increase the health of this area would be to develop an organisational chart showing who oversees who. A discussion about the suitability of the current facilities would also be beneficial.

Strategy

Strategy: *Do we have a clear and effective plan for success?*

57

The organisation strategy demonstrates its priorities and direction. A low score could mean there are no clear steps forward and no momentum to bring about change.

Overall, Example Organisation has cause for concern when it comes to its strategy. Encouragingly, two-thirds of the team feel that management meetings are helpful, and the same number believe the mission does shape the organisational priorities.

The main way to increase the health of this area would be to set clear goals, with each goal having a timeline and a person responsible for overseeing that goal.

Operational Health

Operational Health is the is the measure of the organisation's internal and external operating strength. In effect, it answers the question 'how successfully are we functioning as an organisation?' It measures five key areas of an organisation:

1. Service & Product Delivery
2. Innovation & Development
3. Marketing
4. Sales
5. HR

Operational Health: *How successfully are we functioning as an organisation?*



70

A low score indicates that in one or more of the five aspects, the organisation isn't functioning consistently across each area.

Overall, Example Organisation has areas needing review when it comes to its operational health. Encouragingly, the organisation seems to be in good health when it comes to its HR practices.

The main way to increase the health of this area would be to work on developing the marketing part of the organisation.

Operational Health Breakdown

Service & Product Delivery: *Are we positively impacting our market?*



Innovation & Development: *Are we improving our products and services?*



Marketing: *Are we increasing our profile to potential clients?*



Sales: *Are we converting potential clients to actual clients?*



HR: *Are we developing and managing our staff?*



Service & Product Delivery

Service & Product Delivery: *Are we positively impacting our market?*

62

We can define the service and product delivery aspect as 'positively impacting our market.' A low score could mean the organisation has ceased impacting the market, and will lose clients due to poor customer service, or a lack of quality products or services.

Overall, Example Organisation has areas needing review when it comes to its service and product delivery. Encouragingly, there is a positive impact through its excellent customer service process.

The main way to increase the health of this area would be to investigate ways the organisation can obtain feedback from clients on its services and products.

Innovation & Development

Innovation & Development: *Are we improving our products and services?*

79

We can define innovation & development as 'continually improving all that we do'. A low score could mean the organisation has become stagnant and has settled.

Overall, Example Organisation has areas needing review when it comes to its innovation. Encouragingly, there is a sense that the creative ideas and development life of the organisation is vibrant and inspiring.

The main way to increase the health of this area would be to develop the process of taking an idea and turning it into a quantifiable, marketable product or service.

Marketing

Marketing: *Are we increasing our profile to potential clients?*

52

We can define marketing as 'connecting with those who don't know we exist'. A low score could mean the organisation has become isolated and irrelevant.

Overall, Example Organisation has areas of concern when it comes to its marketing. Encouragingly, there is a sense that staff are excited about what the organisation offers.

The main way to increase the health of this area would be to run teams, events and programs specifically geared towards increasing the organisation profile amongst potential clients.

Sales

Sales: *Are we converting potential clients to actual clients?*

72

We can define sales as 'turning potential clients into actual clients'. A low score could mean that there is not a high conversion rate to generate sales from potential clients.

Overall, Example Organisation has areas needing review when it comes to its sales. Encouragingly, the organisation has a good system for reminding potential clients of the benefits it can offer them.

The main way to increase the health of this area would be to develop the sales team through training and communication of expectations.

HR

HR: *Are we developing and managing our staff?*

87

We can define HR as ‘appropriate people management, from a legal and developmental angle.’ A low score could mean the organisation is either failing to develop its staff, or is not fulfilling legally required conditions for employees.

Overall, Example Organisation is healthy when it comes to its HR. Encouragingly, the main HR manager is considered to be excellent unanimously by the team.

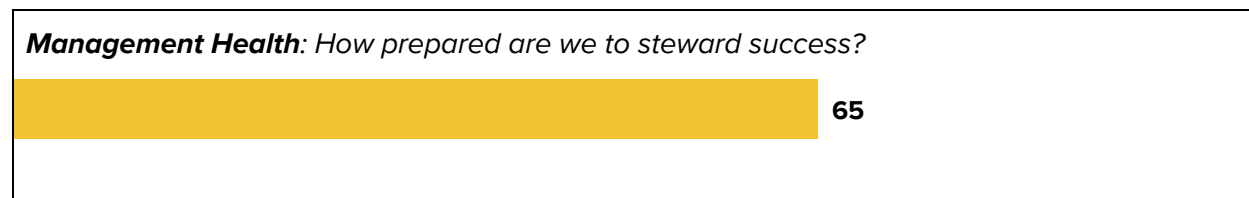
The main way to increase the health of this area would be to develop other managers with HR responsibilities by providing more opportunities and coaching so they can grow in this area.

Management Health

Management Health is the measure of the organisation's leadership efficiency, in how it has developed five key factors that could be growth engines for the organisation - or potential caps to its development. In effect, it answers the question 'how prepared are we to steward success?'

It is measured by assessing five areas:

1. People Resources
2. Team Clarity
3. Engagement
4. Administration
5. Leadership



A low score indicates that in one or more of the five aspects, the organisation could have issues in place that will ultimately impact its potential for growth. These may be being felt now, or could impact later in the life cycle of the organisation.

Overall, Example Organisation has areas needing review when it comes to its management health. Encouragingly, the organisation seems has a decent level of engagement from its staff.

The main way to increase the health of this area would be to work on increasing the team clarity of the organisation.

Management Health Breakdown

People Resources: How easy is it for staff to grow?



Team Clarity: How clear are our staff on the organisation assignment?



Engagement: How passionate are our staff about the organisation?



Administration: How efficiently do we manage our time, energy and money?



Leadership: How effective is our leadership team across all levels?



People Resources

People Resources: *How easy is it for staff to grow?*



68

People Resources is a measure of the organisation training pathway, which is meant to facilitate staff growth through service, leadership, training and opportunities. A low score could mean that there is not a proactive way staff can benefit from opportunities for growth, which will impact how they develop skill-wise.

Overall, Example Organisation has areas needing review when it comes to its people resources. Encouragingly, the training is considered to be inspiring, educating, relevant and applicable.

The main way to increase the health of this area would be to develop a process to intentionally identify and develop skills in staff, providing opportunities for them to use it and receive coaching and feedback.

Team Clarity

Team Clarity: *How clear are our staff on the organisation assignment?*



60

Team Clarity ensures that the staff are clear on the mission, vision, values and plans of the organisation. A low score could mean staff do not know what they are signing up for, working into, or focused towards, and could stop. There is also an increased risk of disunity as other ideas are proposed or embraced.

Overall, Example Organisation has areas needing review when it comes to its team clarity. Encouragingly, there is a strong sense of unity in the organisation.

The main way to increase the health of this area would be to ensure organisation staff are clearly aware of and understand the organisation's mission, vision and values.

Engagement

Engagement: *How passionate are our staff about the organisation?*



70

Engagement measures the buy-in of staff, as shown through their commitment, connection, involvement, and performance. A low score could mean the organisation does not have staff excited about the organisation or its direction, and that there is an apathy or 'paycheck only' mentality.

Overall, Example Organisation has areas needing review when it comes to its engagement. Encouragingly, there is a strong sense of health due to the presence of a good number of staff who have been with the company for longer than two years, which reveals something about the organisation that attracts and retains people.

The main way to increase the health of this area would be to develop the number of staff, as there seems to be a shortage of people working in certain key areas.

Administration

Administration: *How efficiently do we manage our time, energy and money?*



60

Administration measures of the efficiency of how well the organisation manages its resources. A low score could mean resources are being wasted or things are done in such a way that the work is hindered instead of helped.

Overall, Example Organisation has areas needing review when it comes to its administration. The website and social media profiles were considered to be informative, relevant and up to date.

The main way to increase the health of this area would be to develop a review cycle so all activities are properly assessed and improved upon for next time.

Leadership

Leadership: How effective is our leadership team across all levels?

69

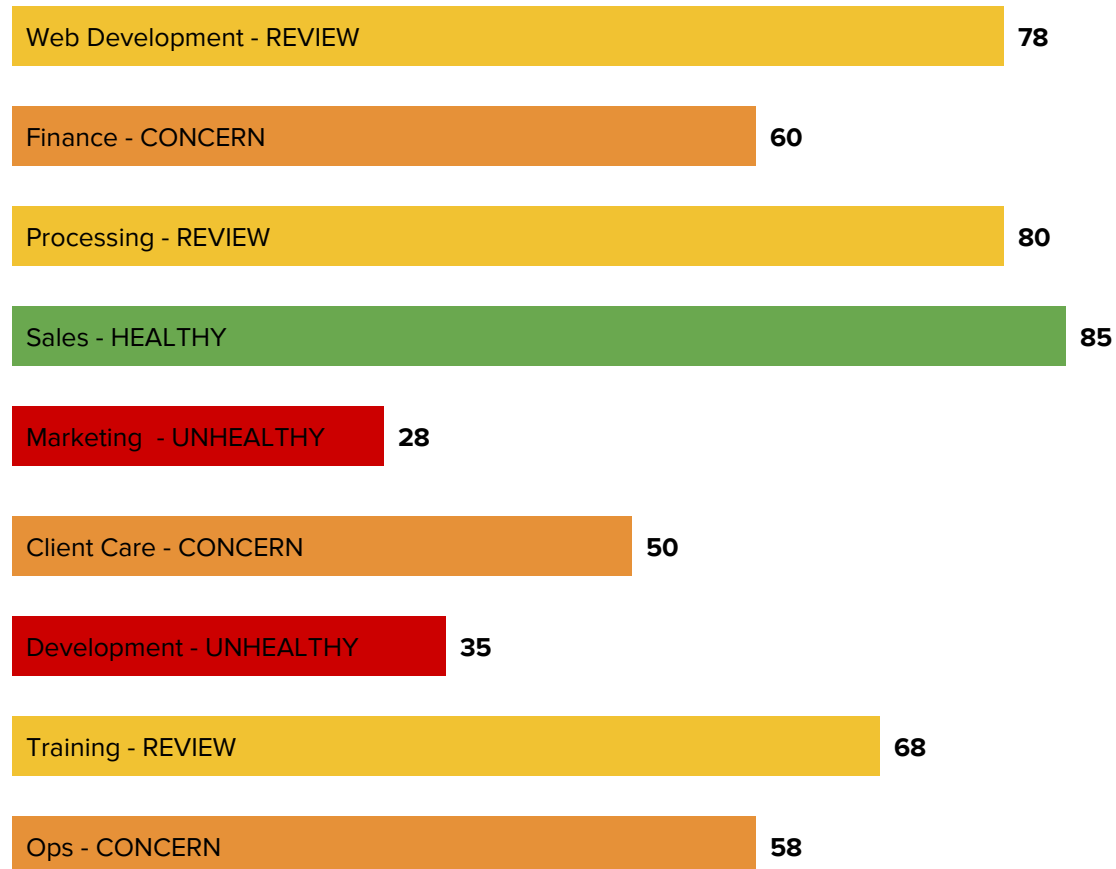
Leadership measures the effectiveness of the leadership process - namely, the directors and management. A low score could mean the leading is inconsistent, unclear or ineffective, and the organisation mission will be less likely to succeed.

Overall, Example Organisation has areas needing review when it comes to its leadership. Encouragingly, there seems to be good personal and working relationships between directors.

The main way to increase the health of this area would be to develop the coaching and feedback of directors, giving them opportunities to grow and develop.

Department Review

The below ministries were presented for review. The results will give an idea how each ministry is performing, and if any need addressing or change.



Organisation Strengths & Weaknesses

Presenting the ten strongest and ten weakest areas will give you a snapshot as to the highest and lowest scoring statements in your assessment.

Strengths

"I am excited over the organisation direction and destination"



"The Chief Executive is competent"



"I know the organisation's mission"



"The organisation mission makes a difference to what we do"



"The Chief Executive is clear on what the organisation's vision is"



"I feel supported in our organisation"



Training are practical, applicable, educating, inspiring and relevant"



"The innovation aspects of the organisation is vibrant and inspiring"



"New ideas are welcomed and supported in our organisation"



"The organisation has a good amount of staff diversity"



Weaknesses

"We regularly collect, review and act on feedback from events, meetings and campaigns."

40

"The organisation is growing numerically"

40

"We have a clear, consistent message"

37

"All directors, including the Chief Executive, have someone they meet regularly with to review their performance and provide encouragement and feedback."

37

"The directors spend more time empowering others to do the work instead of doing everything themselves."

37

"The marketing arm in the organisation is healthy and effective."

35

"People are frequently involved in our organisation meetings."

34

"We regularly run marketing campaigns and programs to reach more potential clients."

31

"If we wanted to start a new service, our facilities wouldn't be an issue."

31

"The leadership development training in the organisation is healthy and effective."

28

End of Sample

Included in the overall package with this assessment is a strategic plan developed from the findings. There is also a free follow-up consultation call with me to discuss this report, as well as map out possible ways forward.

If you are interested in finding out more, please contact me at anthony@anthologycoaching.com

Anthony Hilder
Anthology Coaching

Organisation Assessment

anthologycoaching.com

