**ORGANIZATIONAL HEALTH CHECKLIST**

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|  |  |
| COMPANY INFORMATION |
| Company name:  |  |
| Contact person:  |  |
| Contact info:  |  |

Please complete this Checklist so we can better understand your organizational and leadership needs.

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| --- | --- |
| YES | NO COMMENTS: |
| [ ]  | [ ]  | We have a clearly articulated Vision/Mission/Core Values statement. |  |
| [ ]  | [ ]  | We have a comprehensive strategy to integrate our Vision/Mission/Core Values into our organizational culture. |  |
| [ ]  | [ ]  | We have clearly defined annual and quarterly strategic goals. |  |
| [ ]  | [ ]  | We regularly undergo a thorough Strategic Planning process. |  |
| [ ]  | [ ]  | All teams are aligned and effectively executing the organizational objectives as defined in our Strategic Planning process. |  |
| [ ]  | [ ]  | We frequently collect feedback from staff and/or clients. |  |
| [ ]  | [ ]  | We have a clear Succession Management process in place. |  |
| [ ]  | [ ]  | We have an effective Performance review system in place. |  |
| [ ]  | [ ]  | Employees receive frequent, consistent feedback and support on their performance. |  |
| [ ]  | [ ]  | We have a strong Talent Pipeline including a Talent Assessment & Development process.  |  |
| [ ]  | [ ]  | We have and utilize a Conflict Management protocol to address employee conflicts. |  |
| [ ]  | [ ]  | Our Executive/Leadership team regularly utilizes Executive Coaching services including 360 Assessments to improve leadership skills and competencies.  |  |
| [ ]  | [ ]  | Our upper-level management team is provided with training, Coaching and/or mentoring support to help develop critical management skills. |  |
| [ ]  | [ ]  | We provide Professional Development & Trainings for our staff (e.g. Management Skills, Team Effectiveness Skills, Emotional Intelligence, Stress Management). |  |
| [ ]  | [ ]  | We create a culture in which team members feel motivated, enthusiastic and connected to their work. |  |
| [ ]  | [ ]  | We create a psychologically safe culture in which team members are encouraged to openly discuss their perspective. |  |
| [ ]  | [ ]  | Our teams work in a collaborative, efficient and productive manner. |  |
| [ ]  | [ ]  | We have clearly defined roles and responsibilities in which designation of assigned responsibilities is based on knowledge and skills.  |  |

What near-term objectives is your organization committed to improving based on the results above:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_