

Enterprise/Organizational Assessment

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www.geocities.com/Eureka/Park/7566

www.geocities.com/Athens/Delphi/7527/discontinuous.html

Our Ukraine Project:

www.geocities.com/Eureka/Park/7566/ukraine.html

Enterprise History

Why was the business started?

When was the business started?

What caused the enterprise to thrive and develop?

How has the business change since it founding?

How has the industry change?

What is the firm's niche?

How is the niche changing?

What do you perceive as the major trends in your industry?

Marketing/Customer Focus

Who are the firm's customers?

What are your core assumptions and beliefs about customers?

Why do customers come to your firms rather than competitors?

How many active customers do have on your books today?

How many customer service people do you have?

How do you characterize a good customer?

What is your investment in customer retention?

Why does the firm lose customers?

Who might be potential customers?

Who will be your customers in the future?

How does the firm serve customers?

How is customer perception data used to improve performance?

How does the firm involve customers in it strategic and tactical decisions?

How often does the firm communicate and work with customers?

Do the firm's policies and culture support timely service recovery from errors?

Do employees know who customers are?

Is employee satisfaction with the ability to serve customers assessed?

Competitive/Environmental Changes

Who are the firm's known competitors?

Who are potential invisible competitors?

How is technology affecting your industry?

How do you monitor changes in your industry?

Strategic Development/Management/Leadership

Why are you in business?

What is the firm's vision?

What is the firm's uniqueness?

What are the firm's strategic advantages?

What are the firm's core abilities, skills and capabilities?

What is the firm's strategy(ies)?

What is the firm's mission?

What core values guide the firm?

What is your management philosophy?

Marketing/Relationships

What is your current distribution channel?

What is your future distribution channel?

How many vendors are the firm presently involved with?

Are there any alliances and/or partnerships with other firms?

Organization Improvement/Effectiveness

How are problems solved?

How are opportunities capitalized on?

Does the firm have formal or informal processes for continuous improvement?

Does the firm's culture encourage improvement through action and reflection/review?

Does the firm work with vendors to improve quality and/or create new products?

Does the firm actively support new product and service development?

Are employees actively involved in improving the business?

What are the major challenges facing the firm in the next few years?

What is your vision of the future?

What are your plans for achieving your vision?

Does this vision stretch the enterprise?

What abilities, capabilities and skills will be required?

What changes in structure, systems, policies and managerial practices will be required?

Are customers involved in new product and service development?

What is the firm's level of investment in R&D?

Organizational Organizing & Form

What is the form of the business?

Who are the officers (partners)?

Who are the stockholders?

How often do board members meet?

What role(s) does the board play?

Who is the CEO?

What is the firm's structure?

How effective is the present structure?

Does your structure encourage a "not my job" attitude?

Are you organized by critical processes or departments?

Does your structure encourage collaborative efforts amongst departments to solve problems and capitalize on opportunities?

Does it encourage creating new information?

Does it encourage information sharing?

Does it liberate or inhibit employees in getting the job done?

Does the firm use cross-functional work teams to develop new product and service ideas?

Human Dynamics/Culture

Is office politics a problem?

What is the cost of office politics?

What is your employee turnover rate?

What is the cost of replacing and developing new employees?

Are employees happy with their ability to serve customers?

Are they happy with their ability to produce quality in their work?

Are people happy with the support they receive in performing their task?

What is your investment in employee training and development?

How do you develop employees?

Does any of your employees belong to a union?

What is your relationship with the union?

Have you experienced a strike?

Who are your most critical employees?

What are their duties?

Reward System

How are employees compensated?

Does your reward system encourage employees to act as employees or business people?

Does your system encourage self-motivation?

Does your system support individual, team or organization improvement?

Does your system support self-responsibility?

Does it encourage information sharing?

What are employees rewarded for?

Marketing/Sales

What are your current annual sales?

What ought it be?

What annual sales are required for break even?

What are your most profitable products and services?

Will they remain profitable?

How many salespersons do you have?

How are they compensated?

What are they compensated for?

Do salespersons provide value added services to customer?

Are salespersons scouting customers for opportunities and problems?

When they discover opportunities and problems, does your culture support them collaborating with other departments?

How many individual sales orders do you process each month?

When was the last time you reviewed the performance of your ordering system?

Measurement System

How do you measure value-added?

How do you measure productivity?

How do you measure innovation?

How do you measure quality?

How do you measure customer profitability?

Is customer perception of service data collected?

Does the firm measure the difference between customer expected and delivered quality?

Financial Management

What is your current profit before taxes?

What ought it be?

How often do you receive an operating statement?

How do you use the statement?

How do you control operating costs?

How do you decrease operating costs?

What is your working capital?

What is the current value of your receivable?

What are your terms?

What is the average age of your receivable?

What are the current amount accounts payable?

How do you improve financial performance?

Is financial information shared with employees?

How are investment decisions made?

Have you experienced financial problems?

Do you have bank credit?

How do you project the firm's cash requirements?

How do you finance growth?

Inventory Management

Do you have a system of inventory control?

How often do you take a physical inventory?

Do you use just in time inventory?

How many different items do you have in inventory?

How much of your inventory is obsolete?

Information Technologies

How do you use information technology (computer)?

What information do you want but don't receive?

Why don't you get the information you want?

What other applications do you want to use information technology for?

When you purchased your information technology did you rethink your existing systems?

Consulting Relationship

Why would you authorize a consulting project?

What outcomes do you expect?

What are the critical opportunities that you want to address?

What are the major problems that you want addressed?

Have you every used the services of a consulting firm before?

What are your expectations about the consulting relationship?

How will you know if the project has been successful?

Readiness For Change

What is your readiness to engage in change?

What are your expectations regarding implementing change?

How do you expect change to be implemented?

What do you see your role as in implementing change?

What do you see the consultant(s) role as?

How do your key people deal with change?

How do your employees deal with change?

How successful have past change efforts been?

What caused them to succeed and/or fail?