



5 MINUTE ASSESSMENTS

Transition Readiness Assessment

This assessment measures your organization's readiness for a major change in leadership. Such a change can come from sale, retirement of founder, owners' children taking over leadership, or merger. Effective assessment can calibrate risk and mark areas that need improvement. We measure six critical areas: Information, Priorities, Decisions, Follow-Through, Problem-Solving, Elephants. The result will help you understand your current position, and identify areas to be addressed to improve your business results. Score the statements below on a scale of one to four. Items that score 1 or 2 call for attention very soon, as you plan for a successful transition.

Rate each on a scale of 1 to 4: 1=Strongly Disagree 2=Disagree 3=Agree 4=Strongly Agree

Information

- The amount of information we have is adequate and timely.
- The information we receive is reliable.
- Each of us arrives prepared at every meeting.
- Our information tracks performance daily and weekly.
- The flow of informal information from our organization is timely and useful.
- Lower levels of our company feed us good information quickly and regularly.
- Information flows upward effectively.
- Information flows downward effectively.

Priorities

- We prioritize problems quickly.
- We prioritize problems effectively.
- We all are involved in setting tactical priorities.
- We all are involved in setting strategic priorities.
- We communicate priorities effectively to our people.

Decisions

- We make decisions in time.
- We all support most decisions that the Team makes.
- There is little back-biting after decisions are made.
- Big decisions are made by the group.
- Looking back, our decision-making track record is good.

Follow-Through

- Our follow-through on most decisions is good.
- Problems that arise during follow-through are solved effectively.
- Follow-through is consistent across the organization.
- We track follow-through and report results across the organization.
- All departments do their part in follow-through on major initiatives.
- Follow-through in daily work is very good in all departments.

Problem-Solving

- Most of the time we solve the right problems.
- Problem-solving usually surfaces all needed facts.
- Problems are solved at the right level in the organization.
- Most problem solutions are implemented well.
- Most problem solutions “stick” (i.e., last).
- Problem solutions rarely come from our President.

Elephants (“Elephant in the Room”)

- Most Elephants are exposed quickly.
- We deal with elephants well.
- We all feel safe enough to talk about elephants in Management Team.
- Elephants are generally pointed out in supportive ways.
- The President's Elephants are not sacred.