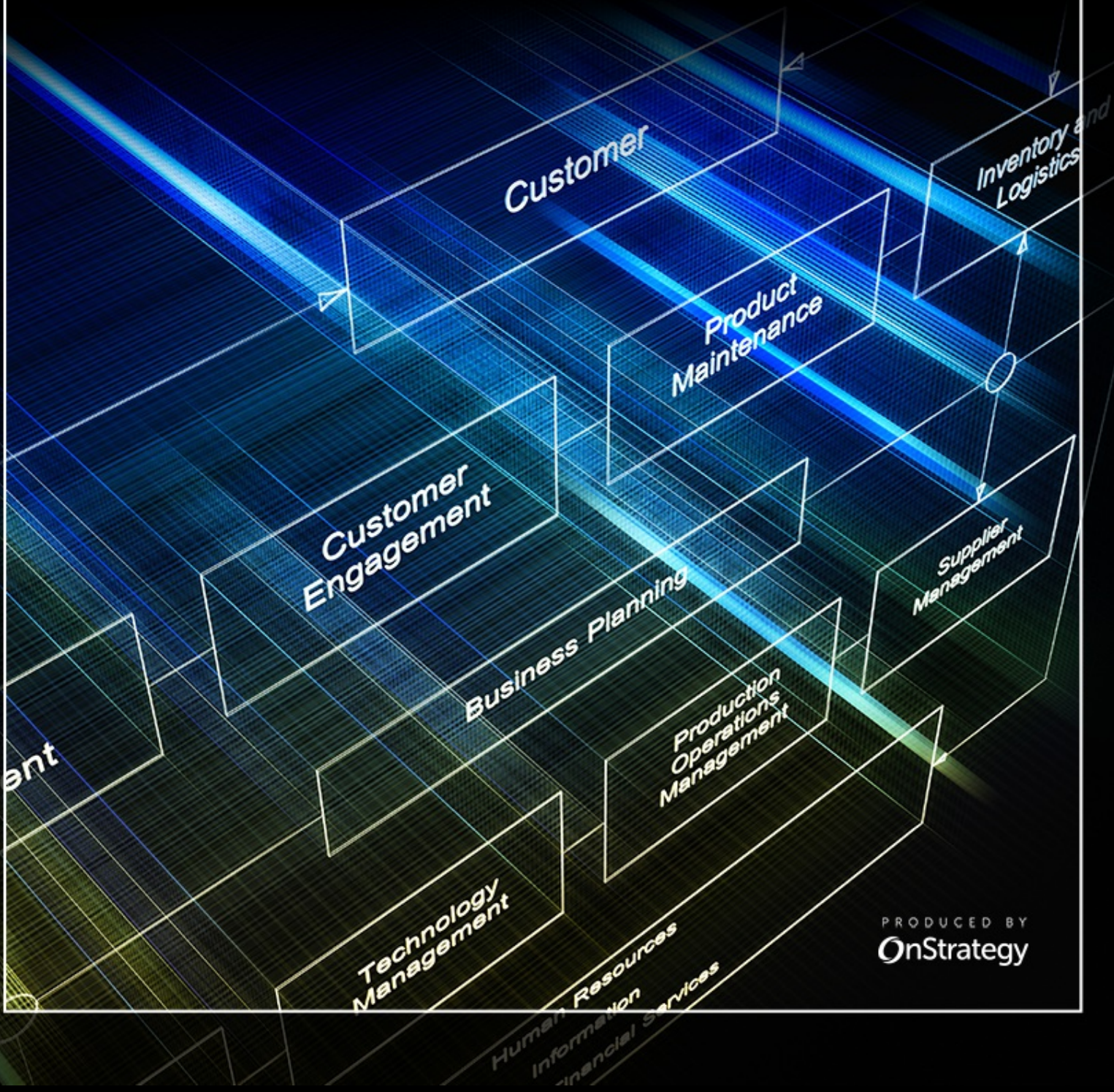


Strategic Performance Index

OnStrategy

October 19, 2016



PRODUCED BY
OnStrategy

Introduction & Purpose

The Strategic Performance Index is a leadership assessment measuring organizational success across key areas of growth, viability and sustainability. Individual strategic competencies are aggregated into a Strategic Performance Index. The index is a measurement of leadership's perspective of strategic performance across six success factors universally recognized as contributing factors essential for effective strategy design, implementation and ongoing performance management. These success factors include specific organizational competencies within: market awareness, organizational vision, financial health, customer development, process improvement and the management of human capital.

Utilizing a survey-based methodology, the Strategic Performance Index and associated Success Factors measure perception across 17 unique Strategic Competency Areas associated with the competencies required for the successful creation and execution of highly-effective organizational strategies. The associated competencies are universal. They are relevant to for-profit companies, non-profit organizations, educational and government entities.

An organization's Strategic Performance Index and measurements across the six Success Factors and underlying Strategic Competencies are used as an effective tool for measuring alignment and dispersion among the perception of an organization's leadership team.

- Is the leadership team aligned on vision, mission and values?
- Is there consensus around the organization's competitive advantages and its ability to identify, retain, and build customer relationships?

In this capacity, the Index is a vital tool for identifying areas of opportunity, alignment and consensus-building prior to initiating Strategic Planning competencies.

The Strategic Performance Index and associated measurements are also a benchmarking tool. It establishes a benchmark for comparing individual organizational performance against the performance of similar organizations defined by size, industry or trade. As a benchmarking tool, these measurements identify areas of strength and opportunity. The information is a useful starting point and should be combined with additional strategic insight prior to strategy design, including environmental analysis, customer insight, employee insight, market trends and operational considerations.

Using the Report

This report is grouped by six critical success factors required for achieving organization-wide success in effective strategy design, implementation and ongoing performance management.

Success Factor #1, Market Awareness: A deep appreciation of an organization's orientation within the markets served is essential for identifying best options for growth and sustainability. Evaluating your current market position and your target market will help you develop strategies and find clear avenues to reach target markets better and more effectively.

Associated strategic competencies include:

- Depth of environmental, competitive and market knowledge.
- Customer understanding.
- Understanding of true competitive advantage.

Success Factor #2, Organizational Vision: An organization's collective vision articulates a preferred future or an ideal state. It is a shared expression of optimism, which defines the future and the end result when the future-state is achieved.

Associated strategic competencies include:

- Sense of core purpose.
- Embedded core values.
- Crystal clear future direction.

Success Factor #3, Financial Health: Financial health is defined by your organization's ability to identify, manage and grow profitable revenue streams. An organization's financial health and sustainability is the ultimate reality check on an effective strategy and the execution of it.

Associated strategic competencies include:

- Revenue growth.
- Profitability improvement.

Success Factor #4, Customer Development: Customer development is an organization's ability to identify, build and retain relationships necessary to achieving an organization's strategic objectives and organizational goals.

Associated strategic competencies include:

- Customer acquisition.
- Customer retention.

Success Factor #5, Continuous Process Improvement: Internal process improvements are integral in measuring an organization's ability to effectively design, implement and manage ongoing performance associated with strategic initiatives. High-performing organizations invest energy to understand why things happen and apply the knowledge to eliminate, improve, or create new processes for driving organizational success.

Associated strategic competencies include:

- Innovation and operational excellence.
- Technology capabilities.
- Execution readiness.
- Organizational communication.

Success Factor #6, Human Capital Management: Human capital is an amalgamation of an organization's inherent talent, skills and knowledge required to effectively deliver against an organization's mission. Investing and nurturing an environment, which develops human capital aligned to the requirements of effective strategic management is a competitive advantage often separating those who succeed and those who don't. Ultimately, great strategy execution only happens when the right skills and capabilities are organized and aligned to the right strategic direction.

Associated strategic competencies include:

- People expertise and organization.
- Culture of learning and growth.
- Strength of leadership.

Understanding the Success Factors

Your organization's performance against each Success Factor is determined by measuring achievement of the 17 corresponding Strategic Competencies. Determining achievement of a Strategic Competency Area is measured by assessing specific competencies within each area. It is these competencies, which formulate the questions used within the survey assessment.

During the survey assessment, respondents are asked for their perception of performance associated with each activity. An analysis of survey responses by OnStrategy generates an aggregate score for each Strategic Competency. Your individual Strategic Competency score, a benchmark against similar organizations, and overall ranking is provided for quick reference to areas your organization is performing well and to those areas needing additional investment.

For each Strategic Competency, OnStrategy provides recommendations for improving organizational performance. Suggested actions are not exhaustive. Rather, they are provided as examples or a basis to discuss possible corrective actions. Tips for using OnStrategy as an organization-wide platform for strategy design, implementation and ongoing performance management are also provided.

Interpreting the Data

The Strategic Performance Index is a preliminary exercise, which is helpful in identifying the unique strategic position of your organization. Benchmark scores and suggested actions should supplement additional organizational initiatives to identify, validate and act upon genuine organizational strengths and areas of opportunity.

Additional input from staff, employees, and customers or constituents should also be considered. Certain scores within the Report may suggest additional assessments should be undertaken to develop a more thorough perspective for rectifying a problem area.

M3 Planning Strategic Performance Index Summary

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| Performance Across Each of the Success Factors | YOUR SCORE | TOP PERFORMERS | DIFFERENCE |
|--|------------|----------------|------------|
| Overall Strategic Performance Index | 311.23 | 333.2 | -21.97 |
| Market Awareness | | | |
| Depth of Environmental, Competitive and Market Knowledge | 26.22 | 26.2 | 0.02 |
| Customer Understanding | 22.14 | 22.8 | -0.66 |
| Understanding the Competitive Advantage | 16.16 | 17.3 | -1.14 |
| Organizational Vision | | | |
| Sense of Core Purpose | 17.49 | 17.3 | 0.19 |
| Embedded Core Values | 16.97 | 16.8 | 0.17 |
| Crystal Clear Future Direction | 16.36 | 15.7 | 0.66 |
| Financial Health | | | |
| Revenue Growth | 18.11 | 22.4 | -4.29 |
| Profitability Improvement | 14.38 | 15.8 | -1.42 |
| Customer Development | | | |
| Customer Acquisition | 15.67 | 16.3 | -0.63 |
| Customer Retention | 18.79 | 22.6 | -3.81 |
| Continuous Process Improvement | | | |
| Innovation & Operational Excellence | 23.64 | 28.3 | -4.66 |
| Technology Capabilities | 15.27 | 16.4 | -1.13 |
| Execution Readiness | 21.04 | 21.8 | -0.76 |
| Organizational Communication | 15.73 | 16.5 | -0.77 |
| Human Capital Management | | | |
| People Expertise & Structure | 19.23 | 21.4 | -2.17 |
| Culture of Learning & Growth | 17.12 | 18.1 | -0.98 |
| Strength of Leadership | 16.91 | 17.5 | -0.59 |

Green (Top Performers): 356 and above

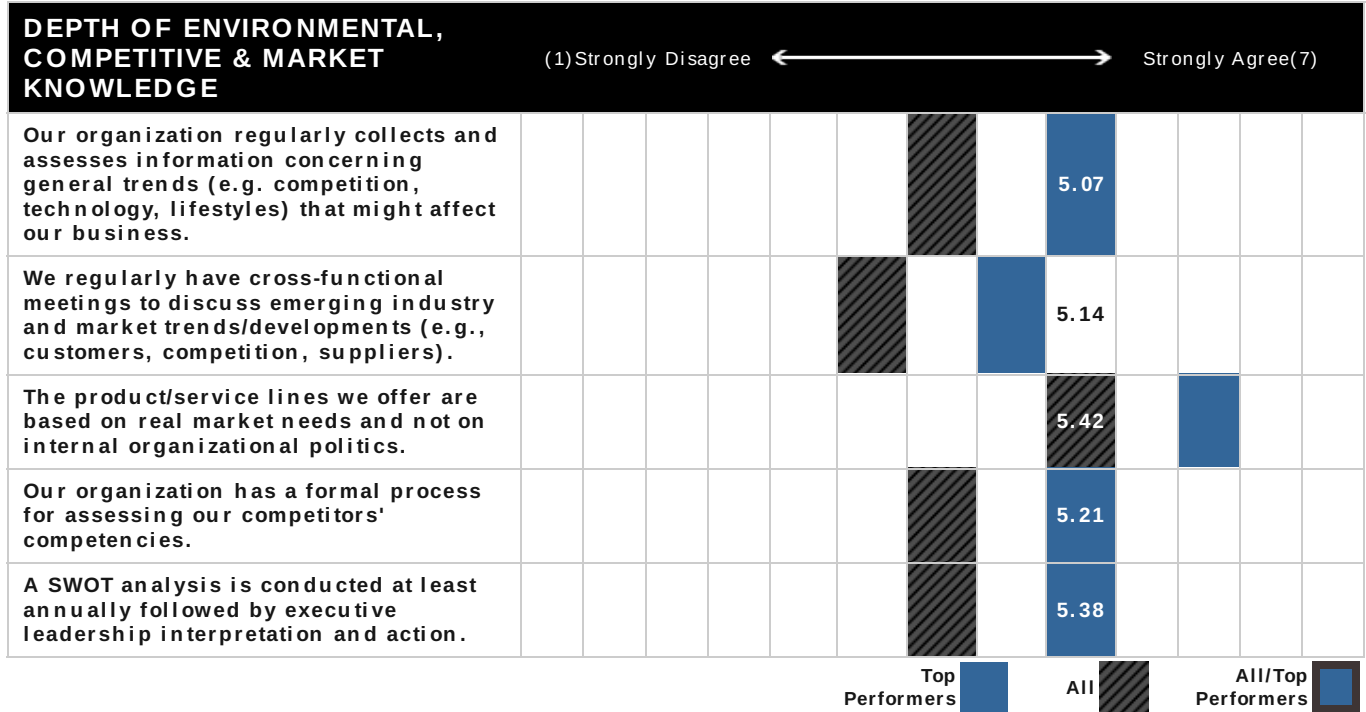
Yellow (Mid Performers): 191-355

Red (Bottom Performers): 190 and below

Benchmarked against similar organization's you are in the top 93.41 percent.

Success Factor #1: Market Awareness

Market Awareness is defined as the collective insight among leadership and staff of your organizations position and unique value proposition relevant to the markets and customers you serve. Just as markets evolve, needs of customers change, and new competitive offerings emerge, an awareness of your position must be continually reevaluated and integrated into effective strategy design, implementation and ongoing performance management.



| | |
|----------------|-------|
| Your Score | 26.22 |
| All Scores | 20.7 |
| Top Performers | 26.2 |

5-16 – Red

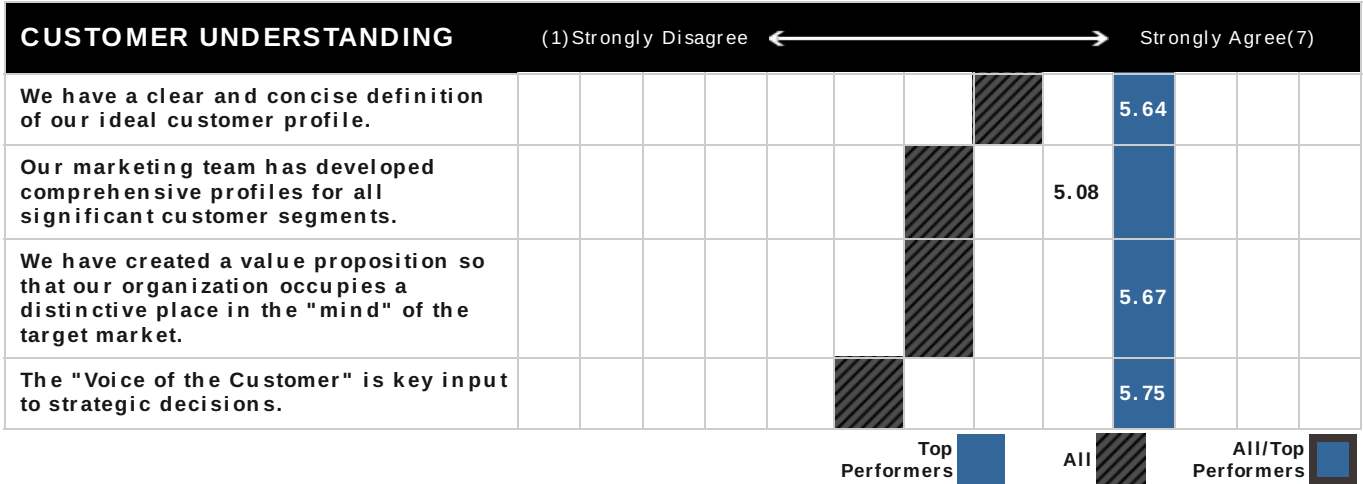
Great strategy creation starts with an "outside-in" look at your organization. Take the first step this cycle to conduct part of an environmental scan using easily accessible information such as gather key industry trends, determine strengths/weaknesses of your top 5 competitors or do a PESTEL. Use the results of this external analysis to populate the O (opportunities) and T (threats) parts of your SWOT.

17-25 – Yellow

You have the discipline of conducting an external analysis, but there's room for improvement. Pick the lowest performing activity in the list above to focus on improving this year. Don't forget to build the outcomes of this analysis into the O (opportunities) and T (threats) parts of your SWOT.

26-33 – Green

Outstanding effort! Keep up the good work by refreshing your industry, market and competitive analysis for this cycle. Push the envelope by thinking about establishing "early warning" industry indicators to make this exercise more timely. (Early warning indicators are macro indicators such as housing starts, consumer price index, etc. that have predictive influence on your business.)



| | |
|----------------|-------|
| Your Score | 22.14 |
| All Scores | 17 |
| Top Performers | 22.8 |

4-13 - Red

Organizations are wildly successful because they constantly exceed their customers' expectations. Before proceeding with strategy creation, seriously consider conducting a customer insights assessment to identify key needs, wants and value you are providing to your primary customer groups. If you have other red areas within Phase One, ignore them for this cycle and focus on bringing the "Voice of the Customer" into your planning process.

14-22 – Yellow

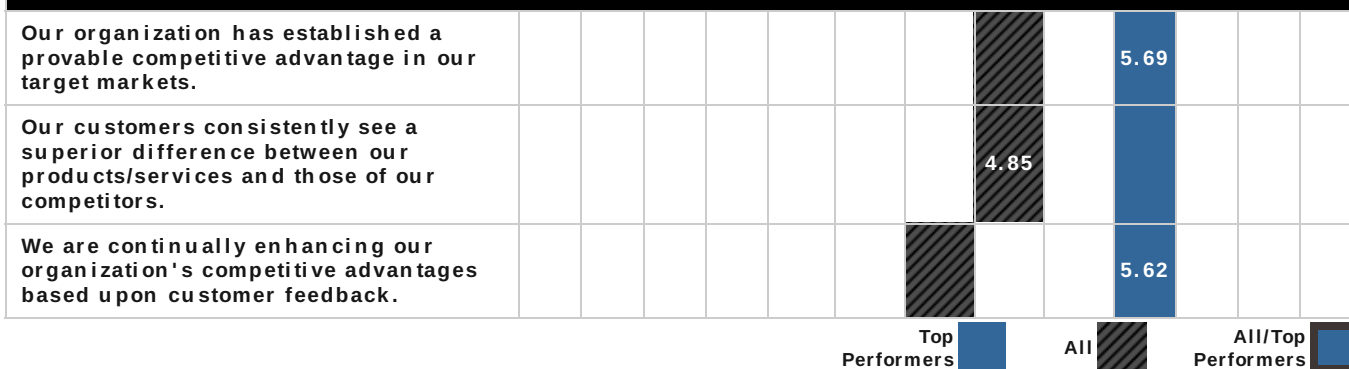
Your organization has the basis for conducting the strategic competencies in customer understanding. Here is how to improve them. If you have current customer insights, use that data to develop or refine customer profiles for your primary customers to include well-articulated value proposition for each customer segment. If you don't have current customer insights, see the suggestions under the "red" category.

23-25 – Green

Organizationally you have a strong knowledge of primary customer segments and their needs. Use your current customer insights data to identify strengths, weaknesses, opportunities and threats - populating your SWOT. Build out your customer profiles to include an identification of target market strategy - market penetration, market development, or product/service development.

UNDERSTANDING OF TRUE COMPETITIVE ADVANTAGES

(1) Strongly Disagree ←————→ Strongly Agree(7)



| | |
|----------------|-------|
| Your Score | 16.16 |
| All Scores | 13.4 |
| Top Performers | 17.3 |

3-10 - Red

Any organization's competitive advantage(s) are the foundation of a great, winning strategy. Make it a focus of this process to identify at least one or two competitive advantages that you have or that you need to be successful in the future. Tools to help discover your competitive advantages are conducting a competitive analysis, asking your key customers why they do business with you and gaining perspective from your staff around the question of what do you do best (better than your competitors and of value to your customers) as an organization?

11-16 – Yellow

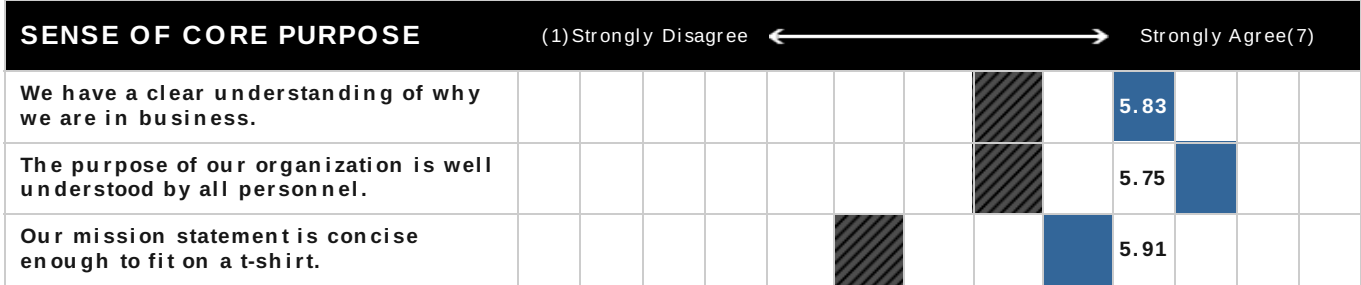
While you have identified your competitive advantages, they might not be sustainable over the mid to long term. Make it a priority as part of this planning cycle to either solidify them or modify them such that you are building your plan to ensure long-term success. Do so by gathering feedback from your whole customer base specifically to assess the strength of your competitive advantages.

19-21 – Green

Since you have these clearly identified (which is really the hard part), make sure to build out goals/objectives/actions that specifically nurture and develop the competitive advantage(s) such that they are sustained into the future.

Success Factor #2: Organizational Vision

An organization's collective vision articulates a preferred future or an ideal state. It is a shared expression of optimism, which defines the future and the end result when the future-state is achieved. Thinking around organizational vision is the guide to an organization's mission, vision and values statements. Great strategy is grounded in your core ideology of mission and values, while being purposefully directed towards casting an envisioned future.



| | |
|-----------------------|--------------|
| Your Score | 17.49 |
| All Scores | 13.2 |
| Top Performers | 17.3 |

3-9 - Red
 Having a great mission statement means it answers with clarity "why we exist as an organization and what our core purpose is," it is genuine to everyone in the organization and concise enough to be memorable (to a degree). Allocate time during this planning cycle to spend time refreshing or developing a new mission statement. Consider getting staff input into various drafts.

10-16 – Yellow
 You probably have a great mission statement, and by extension your core purpose, but it is not widely communicated or known throughout the organization. One way to ensure it is well known is to be clear and concise. Carve out 1-2 hours during this planning process to refine what you have.

17-21 – Green
 You nailed it! Re-communicate the mission statement, your core purpose, as a foundational piece in developing this year's strategy, but don't change it.

EMBEDDED CORE VALUES

(1) Strongly Disagree ← → Strongly Agree(7)

| | | | | | | | | | | | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|------|--|--|--|--|--|--|
| We have no more than 6 or 7 memorable core values that have been thoughtfully selected. | | | | | | | | | | | | | | | 5.62 | | | | | | |
| Our organization's core values are deeply ingrained and widely shared by managers and employees. | | | | | | | | | | | | | | | 5.50 | | | | | | |
| There is no doubt our organization will stand by and maintain our core values no matter what happens in the competitive environment. | | | | | | | | | | | | | | | 5.85 | | | | | | |

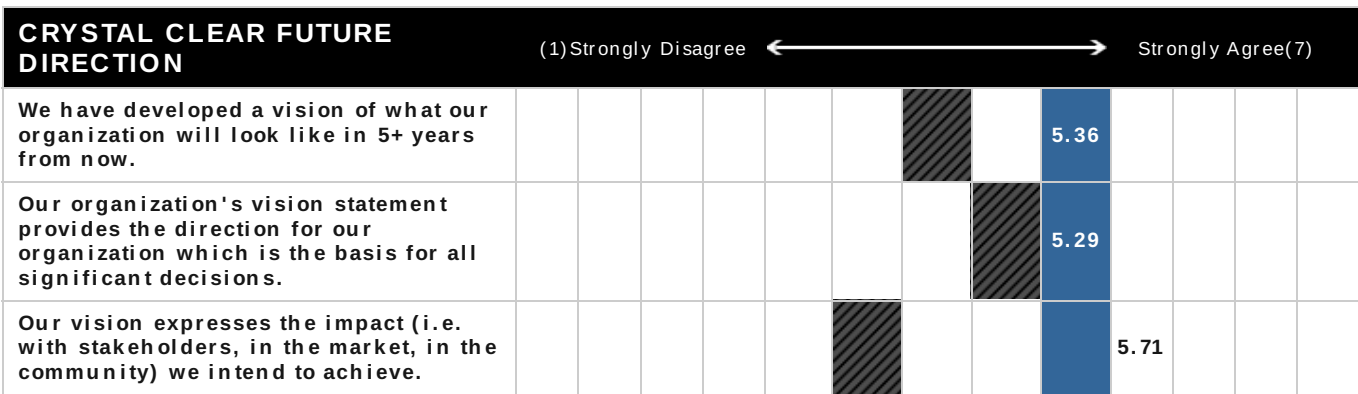


| | |
|-----------------------|--------------|
| Your Score | 16.97 |
| All Scores | 13.7 |
| Top Performers | 16.8 |

3-10 – Red
 Core values serve the purpose of setting expectations around how we will behave as a group of professionals to deliver on our mission. Spend time during this cycle to develop a short (or shorter than what you have now) list of "themes" that explain those expected behaviors. Over the course of the year, work on building those values themes into full statements that explain the behavior you expect to see.

11-16 – Yellow
 Likely your organization has a set of core values, but they are not well socialized throughout the organization. Consider modifying them to include a phrase that explains the behavior you expect to see when living by the value. Do this either through a full organizational engagement exercise or virtually via a discussion group. Make the values visible in the office, in employee evaluations and executive communication.

17-20 – Green
 You are doing something right! Congrats! Add this as a strength in your SWOT. Share with other executives about how you engrained core values into everyone's day-to-day behavior. We'd love to spotlight your success here.



| | |
|-----------------------|-------|
| Your Score | 16.36 |
| All Scores | 11.6 |
| Top Performers | 15.7 |

3-8 – Red

Vision answers the question "where are we going" and it is critical to have as a beacon by which all of your strategies, goals and actions are evaluated against. If you are starting with a blank slate, gather employee insights to help seed the thinking. Also consider conducting a market analysis to determine where there is potential "white space" in the market. Block out at least 2-4 hours to work on casting your vision for the future.

9-15 – Yellow

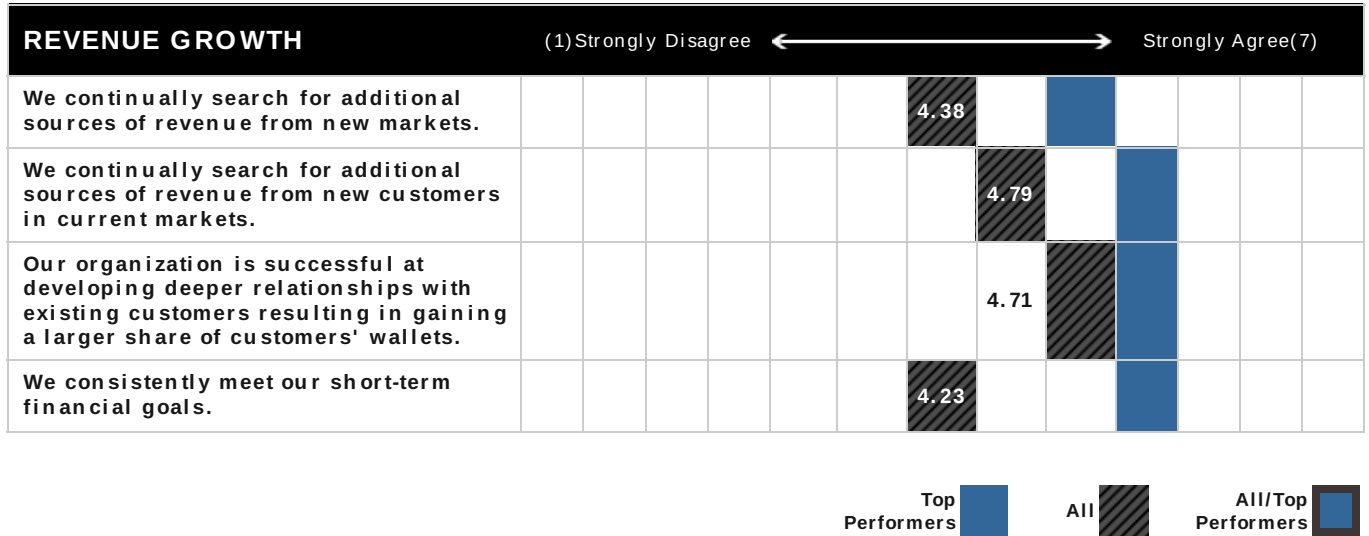
Refresh your vision statement to make it more relevant and more directional. Do so by changing the core statement, adding vision descriptors to make the vision come alive and/or bringing out more clearly the impact you expect to see as a result of your efforts. Don't forget - vision statements need to not only serve as your "North Star," they also need to be inspirational and aspirational!

16-19 – Green

Clearly you have a well-articulated future direction that everyone on the leadership team understands and agrees with. Nice work! Use your vision as a filter for all decisions made during this strategy creation process. Broadcast your vision broadly and reinforce it whenever possible coupled with proof points of progress.

Success Factor #3: Financial Health

Financial health is defined by your organization's ability to identify, manage and grow profitable revenue streams necessary to effectively build and retain customer relationships. Regardless of the industry, for profit, non-profit, government or education, the financial health of an organization is imperative in executing against strategic objectives and goals.



| | |
|----------------|-------|
| Your Score | 18.11 |
| All Scores | 18.4 |
| Top Performers | 22.4 |

4-14 – Red

Revenue growth overall is a weakness in your organization. Instead of tackling all strategic alternatives for improving revenue growth, select one or two areas to focus on this year. Identify these as potential goals/objectives in this upcoming plan.

15-21 – Yellow

Revenue growth is a mixed bag of strengths and weaknesses. Identify which is which by noting those competencies that are lowest scoring as weaknesses and those highest scoring as strengths. During your goal setting process, select one or two of the lowest scoring competencies as a strategic focus in this upcoming plan. As a tip – it is easier to grow revenue from existing accounts than it is to secure new ones.

22-28 – Green

Mark down revenue growth in the strengths column of your SWOT! Likely you are not pursuing both of the new revenue growth strategies (market penetration and market expansion) with equal effort. As a leadership team, determine which one will be the strategic focus in this upcoming plan.

| PROFITABILITY IMPROVEMENT | | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|--|--|
| (1) Strongly Disagree ← → Strongly Agree(7) | | | | | | | | | | | | |
| When confronted with an important decision, we develop a thorough cost benefit analysis of the situation. | | | | | | | | | | | | |
| We have developed (and maintain) a production process for goods/services that is very cost efficient. | | | | | | | | | | | | |
| We have an effective cash management system. | | | | | | | | | | | | |



| | |
|----------------|-------|
| Your Score | 14.38 |
| All Scores | 11.9 |
| Top Performers | 15.8 |

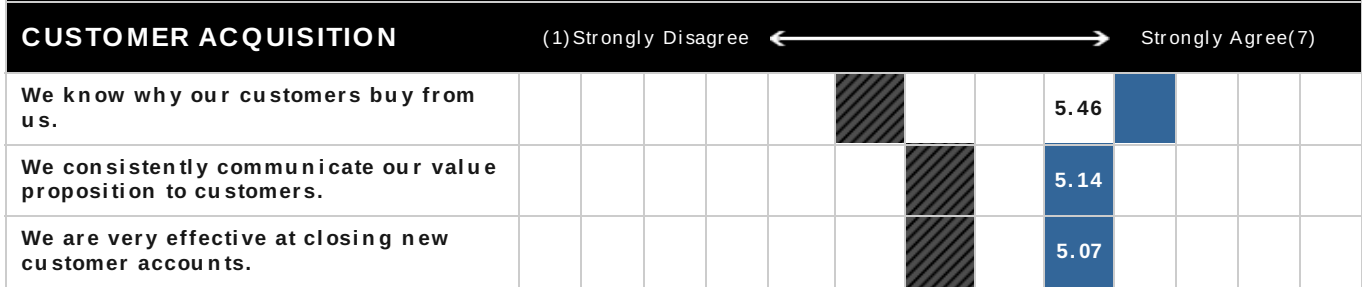
3-8 – Red
 Profitability is an area of weakness for your organization. Certainly the solutions to improving profitability can be found in the competencies listed here as well as in the “Operational Effectiveness” section below. Definitely make profitability improvement as a strategic focus in this upcoming plan by setting it as a corporate goal with clear end-of-year targets.

9-15 – Yellow
 While some of these competencies are being performed well, some could be improved resulting in an increase in profitability this coming year. Note those with high scores as strengths and those with low scores as weaknesses. Consider setting profitability improvement as a corporate goal in this upcoming plan with supporting action items in those areas that need to be improved as listed in the above grid.

16-21 – Green
 You have the right competencies in place to ensure profitability is maintained. Definitely note profitability as a strength. While you are doing all the right things, it’s likely you still want to improve profitability beyond where it is now. Depending how many other areas of focus you have identified in this assessment, consider setting profitability improvement as a corporate goal in this upcoming plan if you don’t have too many.

Success Factor #4: Customer Development

Customer development is an organization's ability to identify, build and retain relationships necessary to achieving an organization's strategic objectives and organizational goals. Success in acquiring new customers and retaining current ones is based on delivering a clear, market-based value proposition. Growth, the primary outcome of all strategic plans, comes from excelling in these strategic competencies.

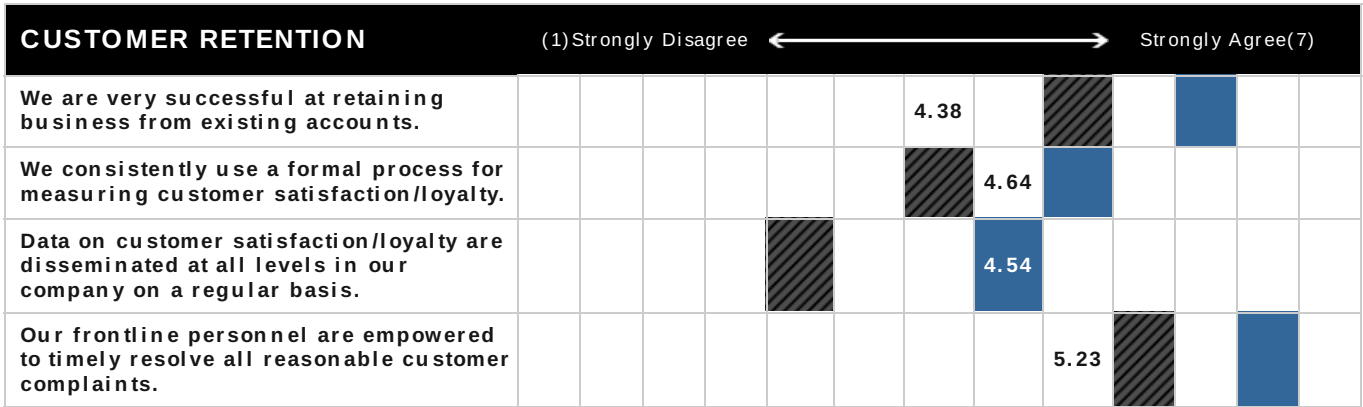


| | |
|----------------|-------|
| Your Score | 15.67 |
| All Scores | 12.2 |
| Top Performers | 16.3 |

3-10 – Red
 Customer acquisition is an identified weakness, which often has varied drivers that are industry and economically dependent. However, what you can prioritize this year is solidifying your value proposition to your primary customer segments as a means to turn this weakness into a strength. Set a corporate goal around new customer acquisition with a supporting and first action item to develop your value proposition for your top three customer segments.

11-15 – Yellow
 For those items that you scored high, list them as strengths and those that you did not as weaknesses. Because all of these competencies are critical to effective customer acquisition, pick the one that is the lowest as a strategic focus for this upcoming year.

16-20 – Green
 Customer acquisition goes in the strengths column of your SWOT! Take this to the next level by clearly identifying what your value proposition is for each primary customer segment as well as your segment specific strategy for growth – market penetration, market expansion or product/service development.



| | |
|----------------|-------|
| Your Score | 18.79 |
| All Scores | 18.5 |
| Top Performers | 22.6 |

4-15 – Red

Getting close to your customer clearly needs to be a high-priority strategic area of focus for this upcoming year. Start by establishing your customer loyalty benchmark through a customer survey that includes questions about how well you are delivering on your value proposition. Push the results out to the whole organization and incite action through incentives linked to feedback from the survey. Need more information?

16-22 – Yellow

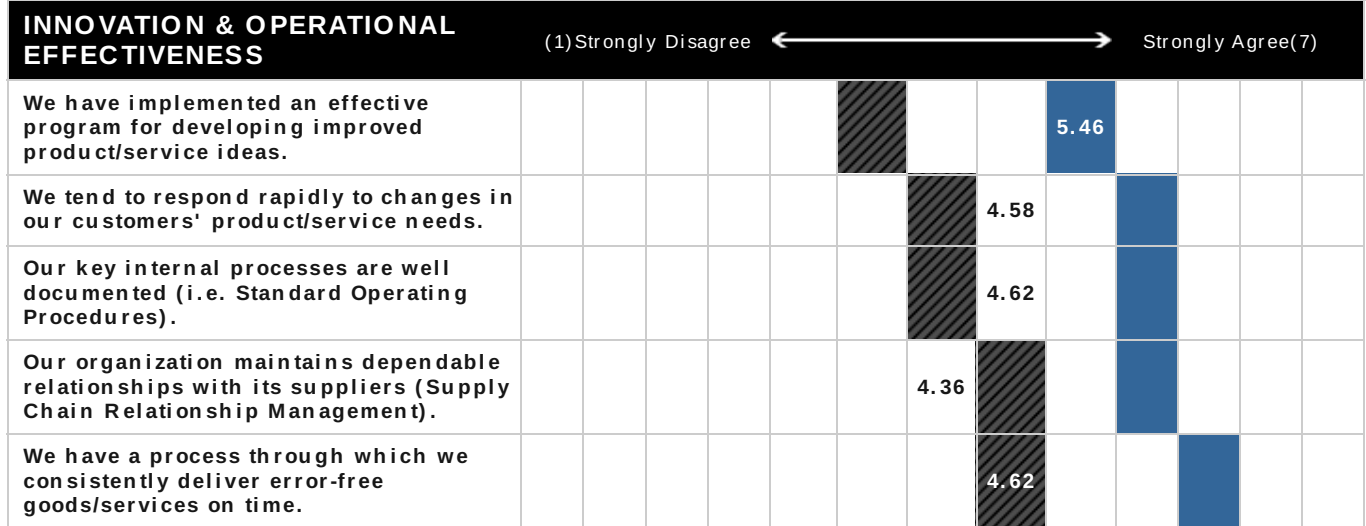
It looks like you are doing a good job at capturing the voice of the customer but not necessarily getting the results out to those who can directly and repeatedly affect change. Note customer retention as a strength and the internal process of disseminating that feedback as a weakness. Depending on the number of strategic focus areas, consider making this a corporate priority for next year.

23-28 – Green

Customer retention is a strength to be noted and celebrated! While you're doing great, there is always room for improvement when it comes to being more customer focused. Pick the lowest scoring activity as a strategic area of focus for next year's plan.

Success Factor #5: Continuous Process Improvement

Continuous process improvement is an ongoing effort to improve products, services, or processes supporting an organization's strategic objectives and goals. These efforts can seek "incremental" improvement over time or "breakthrough" improvement all at once. Delivery processes are constantly evaluated and improved in the light of their efficiency, effectiveness and flexibility.



| | |
|----------------|-------|
| Your Score | 23.64 |
| All Scores | 22 |
| Top Performers | 28.3 |

5-15 – Red

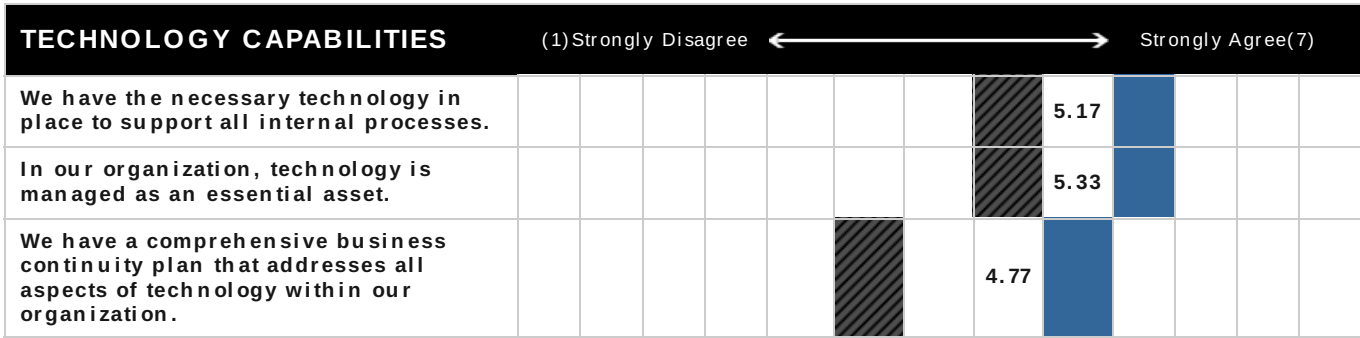
In terms of innovation and operational effectiveness, both of these are weaknesses in your organization right now. While these are certainly two distinct sets of competencies, they are interrelated by way of being core to a well-run operation. Select either the innovation competencies (the first two items in the grid) or the operational effectiveness competencies to focus on in this year's upcoming plan. Set this area of focus as a corporate goal with outcomes that are leading indicators of your profitability.

16-27 – Yellow

With cautionary performance in innovation and operational effectiveness, either one or both of these are weaknesses in your organization right now. Based on the scores, note which are strengths and which weaknesses to populate the appropriate competencies in your SWOT. Determine if the weaknesses identified will become a strategic area of focus after reviewing all of the possible areas to determine priority.

28-34 – Green

Great work in these two areas – note them both, innovation and operational excellence, as strengths in your SWOT. For this year, you can put these into maintenance mode allowing strategic focus to be placed in other high priority areas.

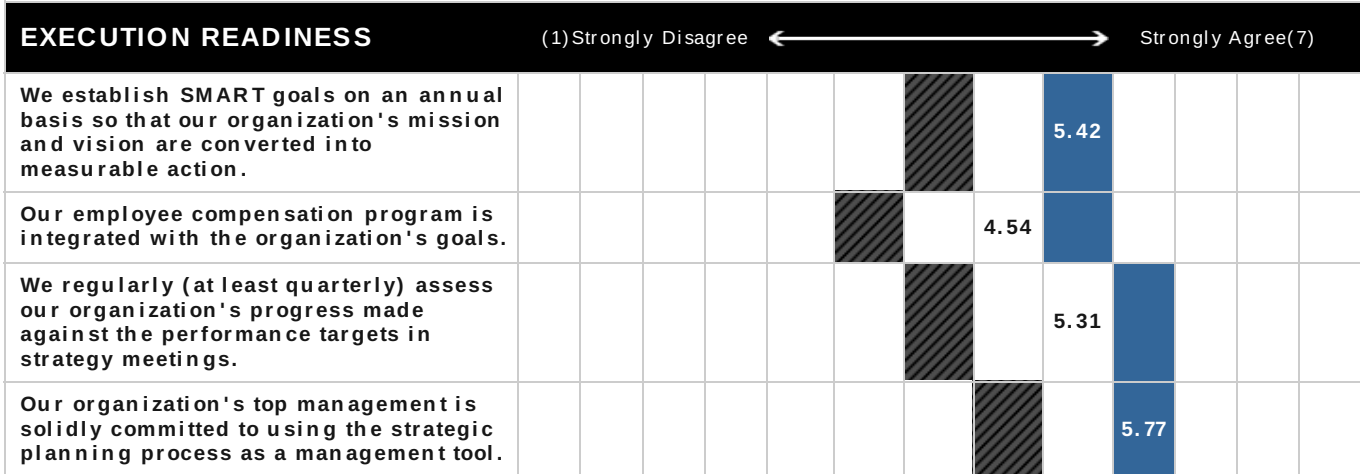


| | |
|----------------|-------|
| Your Score | 15.27 |
| All Scores | 13.2 |
| Top Performers | 16.4 |

3-10 – Red
 Having the right technology capabilities to achieve high performance is an area that is a weakness and is holding you back. Likely you know the areas of focus that need investment to propel your organization into the future. If not, consider securing a current state assessment from an IT professional.

11-15 – Yellow
 Likely you and your team feel like you have the right technology or technology plan to grow and accelerate performance. If this is true, note it as a strength. More often than not, organizations fall down on having an updated business continuity plan. Make this a priority for the upcoming year because it will be too late after.

16-19 – Green
 Technology capabilities are definitely a strength to be noted on your SWOT. Keeping this as a strength will be an accelerator for your high performance. Depending on how you achieve this, you may or may not need to set technology as a strategic area of focus for next year's plan.

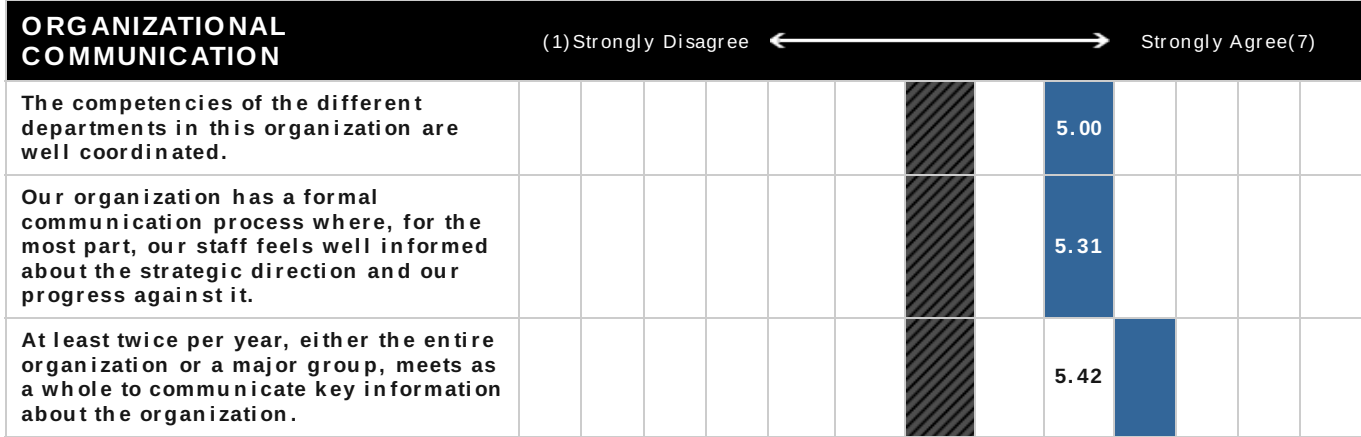


| | |
|----------------|-------|
| Your Score | 21.04 |
| All Scores | 17 |
| Top Performers | 21.8 |

4-12 – Red
 The first place to improve performance management and drive effective execution is through cascading goals from the corporate level to department/division managers to individual contributors. In addition to an effective cascade (this occurs when the goals are 100% within the responsibility and authority of the owner to accomplish), goals must have clear measurables and targeted outcomes. The SMART goal structure really does have a purpose. These two best practices are the basis for improving any activity in this area.

13-21 – Yellow
 While you have pieces of a performance management process in place, there are still opportunities for improvement to drive better execution. Most of the time organizations struggle with linking compensation to goals and sticking to a regular progress review process. Pick one of these two to improve this year.

22-28 – Green
 Nice job! It looks like you have a well-functioning performance management process. Take this process to the next level by rigorously tracking group decisions and then, most importantly, assessing how they played out quarter over quarter or year over year. The purpose of this is to get tighter and better at corporate decision making.



| | |
|-----------------------|--------------|
| Your Score | 15.73 |
| All Scores | 12.1 |
| Top Performers | 16.5 |

3-9 – Red

The bad news - you've got some work to do here. The good news - it's not hard. Effective organizational communication is a foundational activity to getting the full results from your strategic planning effort. Pick one of the three competencies in this area to improve this year. They are all important and will yield results. Make sure to use key parts of your strategic plan, such as mission, values, vision and critical goals/objectives as message points.

10-16 – Yellow

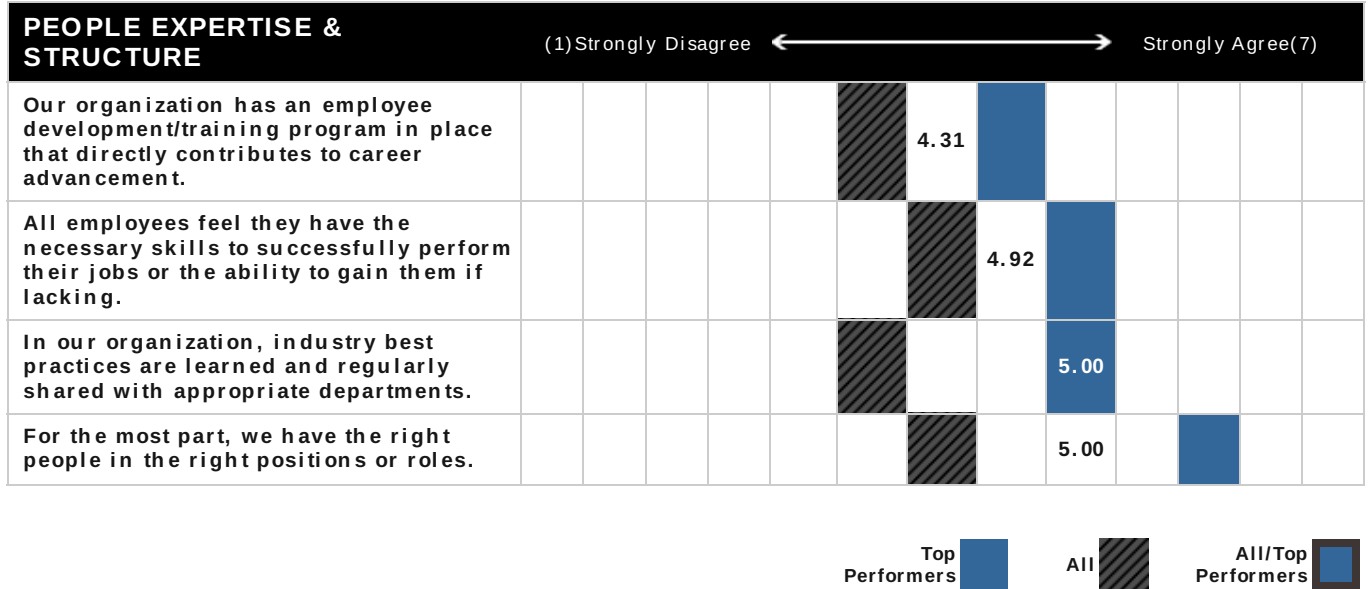
While there is some level of effective organizational communication, there is opportunity for improvement. Leverage the strategic planning process as a way to implement those improvements. Because the plan is intended to function as a management tool that drives informed decisions at every level of the organization, set up a schedule to rollout the plan as well as communicate the progress monthly. In the schedule, identify levels in the organization, channel (all-hands meeting, email, intranet, etc) and key messages.

17-21 – Green

Congrats! Everyone feels like the organizational communication competencies are effective. If you have not already, make sure to embed progress against your strategic direction into your communication schedule. If you have already done this, keep it interesting through gamification, publicly displayed strategy dashboards and other contests.

Success Factor #6: Human Capital Management

Human capital is an amalgamation of an organization's inherent talent, skills and knowledge required to effectively deliver against an organization's mission. Investing and nurturing an environment, which develops human capital aligned to the requirements of effective strategic management is a competitive advantage often separating those who succeed and those who don't.



| | |
|----------------|-------|
| Your Score | 19.23 |
| All Scores | 15.8 |
| Top Performers | 21.4 |

4-12 – Red

Of all the possible areas of focus in this section, people expertise needs to be your highest priority. Low performance in these competencies is leading indicators to many of the other strategic competencies in this benchmark. Set this as a high-priority for this planning process. Select one or two of the competencies listed above to work on and establish them as corporate goals for next year's plan.

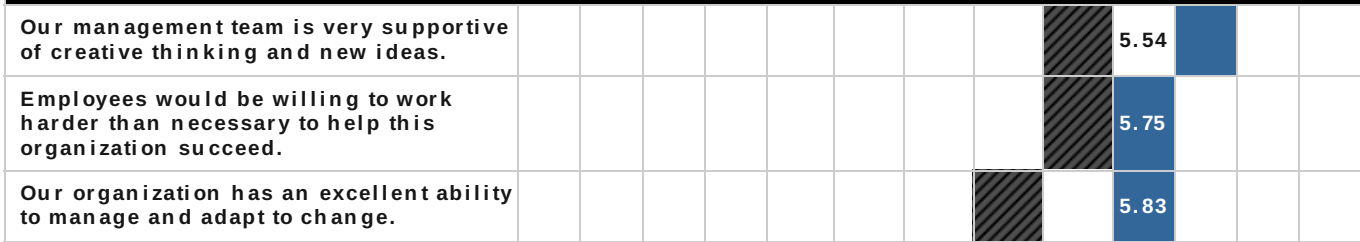
13-20 – Yellow

You're standing still in the area of people expertise – some competencies are working well and others are not. Identify those that are high scores as strengths and those with low scores as weaknesses. Turn this whole area into a strength next year by selecting the two lowest performing competencies as strategic areas of focus for next year. Does two feel overwhelming? Select one and hit it out of the park!

21-27 – Green

Your organization must be a great place to work! Congrats and note the competencies in this area as strengths. Depending on how the rest of this benchmark looks, you might consider either noting this area for maintenance or select the lowest scoring activity to improve.

CULTURE OF LEARNING & GROWTH (1) Strongly Disagree ← → Strongly Agree(7)



| | |
|----------------|-------|
| Your Score | 17.12 |
| All Scores | 14.7 |
| Top Performers | 18.1 |

3-11 – Red

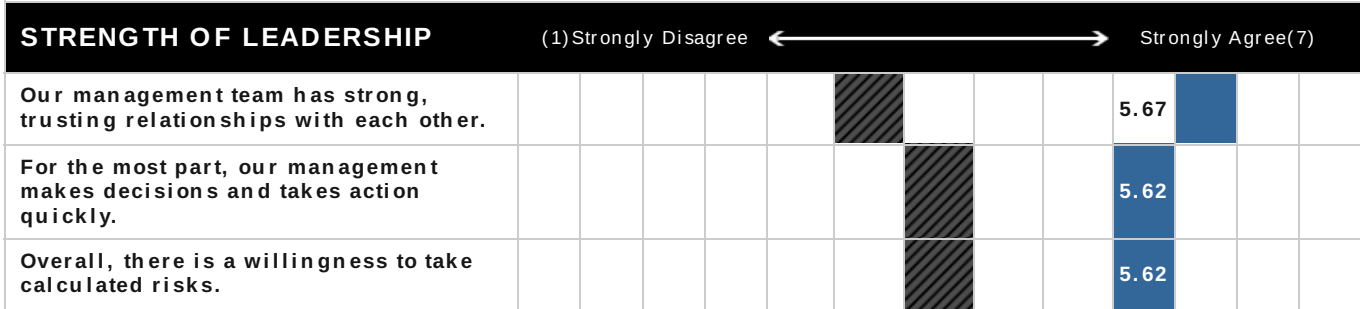
Building a culture of learning and growth is critical to high performance. Because this area is holding you back, note it as a weakness. For this planning process, pick the lowest scoring activity to work on in an effort to build the organizational culture you want to be known for. Establish this activity as a corporate goal with the performance metric of employee engagement.

12-17 – Yellow

A culture of learning and growth is neither holding you back nor accelerating your performance. Determine what competencies are weaknesses and which ones are strengths based on the scores in the grid above. With the executive team, select the one activity you think will make the biggest difference in turning this area into one that is an accelerator. Establish this activity as a corporate goal with the performance metric related to the outcome of the activity.

18-21 – Green

A culture of learning and growth is an accelerator for your high performance and is a strength on your SWOT! Unless there is something jumping out to you that is a low score in this area, consider putting this into maintenance mode for this year.



| | |
|----------------|-------|
| Your Score | 16.91 |
| All Scores | 11.6 |
| Top Performers | 17.5 |

3-8 – Red

Proceed with your strategic planning process cautiously because a team that does not have a foundation of trust will struggle to create an objective corporate strategy. Consider building in trust-building exercises into your planning offsites or retreats.

9-16 – Yellow

Depending on which of these three behaviors is low-trust, decision making and/or risk taking—take one of the following actions. For low trust, build in trust-building exercises into your planning offsite. For slow decision making and risk aversion, conduct a "5 Whys" discussion with the management team to figure out the root cause of low performance in these areas.

17-21 – Green

Teams that have a high level of trust not only accelerate their effectiveness, they are able to move more quickly to take advantage of opportunities and mitigate risks. Collectively all respondents view your management team as high performing. Your planning offsites or retreats should go smoothly!

| PERFORMANCE METRICS | (1) Declined Substantially ← → Increased Substantially (7) | | | | | | | | | |
|--|--|--|--|--|--|--|--|------|------|--|
| | Our sales volume has: | | | | | | | | 4.58 | |
| Our net profit has: | | | | | | | | 4.75 | | |
| The number of key accounts has: | | | | | | | | 4.92 | | |
| The percentage of the company's repeat customers has: | | | | | | | | 4.92 | | |
| Our operational efficiency has: | | | | | | | | 5.17 | | |
| The complaint level for our company's principal product/service has: | | | | | | | | | 5.55 | |
| The skills of our workforce that support corporate strategy have: | | | | | | | | 5.33 | | |
| Employee engagement in our company has: | | | | | | | | | 5.55 | |



| | |
|----------------|-------|
| Your Score | 40.77 |
| All Scores | 11.6 |
| Top Performers | 17.5 |

5-15 – Red

In terms of innovation and operational effectiveness, both of these are weaknesses in your organization right now. While these are certainly two distinct set of competencies, they are interrelated by way of being core to a well-run operation. Select either the innovation competencies (the first two items in the grid) or the operational effectiveness competencies to focus on in this year's upcoming plan. Set this area of focus as a corporate goal with outcomes that are leading indicators of your profitability.

16-29 – Yellow

With cautionary performance in innovation and operational effectiveness, either one or both of these are weaknesses in your organization right now. Based on the scores, note which are strengths and which weaknesses to populate the appropriate competencies in your SWOT. Determine if the weaknesses identified will become a strategic area of focus after reviewing all of the possible areas to determine priority.

30-34 – Green

Great work in these two areas – note them both, innovation and operational excellence, as strengths in your SWOT. For this year, you can put these into maintenance mode allowing strategic focus to be place in other high priority areas.

Respondent Demographic Information

Respondents: 18

Titles

| Title | Count |
|------------------------|-------|
| Owner | 7 |
| Executive/C-Level | 1 |
| Senior Management | 1 |
| Middle Management | 5 |
| Individual Contributor | 1 |
| Board Member | 3 |

Your Next Steps

Your Strategic Performance Index is a broad perspective of your organization's strategic effectiveness. Evaluate your individual score against each Strategic Competency. Consider focusing on the top two largest negative scored competencies; talk with stakeholders, determine gaps, and use this information to better design or refine your organizational strategies.

About OnStrategy

OnStrategy is the enterprise, cloud-based leader in strategy management. Our online tools and hands-on services, including our flagship platform for empowering people to create and execute strategy, connects customers, employees and stakeholders to achieve enduring success.

As a strategy process leader and management partner, we believe strategy is more than simply achieving business goals. Smarter strategy builds smarter organizations. It inspires people to work hard, incite action and make things happen. Simply architected, thoughtfully executed, strategy moves mountains.

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