

<b>NAME:</b> _____	<b>DATE:</b> _____
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This review is meant to focus on 4-areas (lanes) on a regular basis to evoke positive strategic change and growth for the team and the organization. Those areas are **operations, sales/marketing/promotion, human resources and finance.**

## Phase #1: ORGANIZATIONAL CHECK-UP

<b>Organizational Check Up</b>	<b>Score 1-10</b>
<i>Have a clear mission/vision in writing that is properly communicated and shared by the entire team.</i>	
<i>Establish clear core values that are implemented in every facet of operations and promotions.</i>	
<i>Create fluent Job Descriptions, org chart (current and future), team calendars that makes every position clear and focuses on the mission, using the core values metrics for success.</i>	
<i>Creating an effective meeting culture, using the "preparation, engagement and follow-through" process, coupled with a new "ownership" mentality for each team member.</i>	
<i>Create clear work-flow processes for each department and team member.</i>	
<i>Create clear messaging to make the staff and (and any promotion) advocates for growing your organization.</i>	
<i>Creating a leadership model that evokes openness, honesty and trust. (Every team member fulfilling their roles, having ownership and being accountable for their duties.)</i>	
<i>Setting quarterly goals for each team member that help the organization stay on course with the mission and reach the overall goals of the organization.</i>	
<i>Gather systematic feedback from team members AND clients to make quarterly strategic decisions to meet goals.</i>	
<i>Establish a quarterly strategy meeting that reviews "scorecards" for each "lane" to make adjustments in each area in a more timely fashion to meet the overall goals of the organization.</i>	
<b>Total Score</b>	

## Phase #2: SPIRITUAL CHECK-UP

Spiritual Check Up	Score 1-10
<p><b>Leadership.</b> How often do you pray for the ability to think and act more like Jesus so you can grow into a stronger leader? Confess your mistakes and repent when you fall short; hold yourself and the people who work for you accountable to deliver results; and serve others regularly.</p>	
<p><b>Develop a Clear Vision.</b> Does your team know where you are going and why they are following you? Define your company's vision, core values, and performance expectations. Have a clear mission/vision in writing that is properly communicated and shared by the entire team. Establish clear core values that are implemented in every facet of operations and promotions.</p>	
<p><b>Pride.</b> Pride is a particularly dangerous sin because it not only separates you from God, it causes you to attack God by attempting to dethrone Him in your life and enthroning yourself as your own god. Are you asking God to help you cultivate humility, which will bring you both peace and success? Recognize that you're a sinner just like all other people and are not superior to anyone else. Don't always insist on having your own way just because you own the business. Seek out and be open to biblical instruction, reproof, rebuke, and constructive criticism. Learn from others and accept help from them whenever you need it.</p>	
<p><b>Godly Character.</b> Do you ever find yourself telling "white lies" or ask the people who work for you to do so? Tell the truth even when it's not easy, cheap, popular, or convenient. Follow through on your commitments even if they become more costly, inconvenient, or time-consuming than you'd estimated. Always do more than just enough to get a job done; put forth the extra effort necessary to do an excellent job. Don't give others false impressions, such as by omitting facts that reveal reality or offering excuses to disguise reality.</p>	
<p><b>People Skills.</b> Do you genuinely care about people? Value working with people more than doing paperwork. Learn how to be efficient with things but effective with people. Listen more than you speak. Ask the right questions to engage others in good conversations. Don't keep score with people; serve them to express your love for God rather than because you're expecting something in return. Don't judge people or try to debate them toward YOUR agenda, instead, love them and show humility (without stuffing). Control your attitudes and emotions to make them positive rather than negative. Look for ways to meet others' needs. Speak respectfully to people and well of them. Invest in your employees' development by giving them the resources they need to be successful. Care enough to confront them when they're off track. Pray for them regularly.</p>	

<p><b>Team Building.</b> Do you hire people prayerfully and strategically? Establish a culture that promotes accountability and includes Jesus in every facet of operations. Develop your team with the highest upward potential in your business and delegate work to them, encourage them, and hold them accountable for results.</p>	
<p><b>Refuse Offense and Frustration.</b> Do you get easily offended and frustrated? Learn how to confront and not stuff. Let go of grudges against people who hurt or offend you; forgive and reconcile right away. Always be honest and up front, keeping a short leash on your emotions. Don't be a stuffer!</p>	
<p><b>Time Management.</b> How well do you focus your time on the tasks that you can do best accomplish in the least amount of time? Identify your priorities and base your schedule on them. Don't let trivial tasks consume too much of your attention; focus on what's most important. Whenever you need to add something to your "to-do" list, take something off the list to make room for the new task. Trust God in every part of your life and tell Him that you want to use your time to fulfill His purposes for you. He will guide you to use your time well.</p>	
<p><b>Managing Money Well.</b> Remember that all the money you and your company have comes from God. Give generously as God leads you. Avoid unnecessary debt and pay existing debt off as soon as possible. Don't concern yourself with the prosperity of dishonest people; keep doing what's right yourself and trust God to judge everyone fairly. Pay all the taxes you owe to the government. Don't enter into business partnerships with nonbelievers.</p>	
<p><b>Work-Life Balance.</b> Build mental balance into your life by learning new information and developing new skills. Build emotional balance by constantly investing in your relationships. Build physical balance by getting enough sleep and exercise regularly and eating a healthy diet. Build spiritual balance by celebrating disciplines like prayer, Bible study, scripture meditation, and participating in church worship services. Build structure for all quadrants of life and make sure you are addressing them all with the same amount of passion (for Jesus).</p>	
<p><b>Total Score</b></p>	

## Phase #3: SWOT ANALYSIS

### Analyzing strengths, weaknesses, opportunities, threats (SWOT)

SWOT (strengths, weaknesses, opportunities, and threats) analysis is a framework used to evaluate an organization's competitive position and to develop strategic planning. SWOT analysis assesses internal and external factors, as well as current and future potential. It is important to be able to reflect on and analyze the strengths but also to consider areas that you need to develop, so that you can recognize what opportunities are available and where you might have problems in the future. To be of value you need to take an honest and critical view of each lane in your organization.

<b>Strengths (Current)</b>	<b>Opportunities (Future)</b>
<b>Weaknesses (Current)</b>	<b>Threats (Future)</b>

## Phase #4: PERFORMANCE IMPROVEMENT PLANNING

The purpose of this Performance Improvement Plan is to define areas of potential growth, and reiterate **STRATEGIC** expectations, that allows the opportunity to demonstrate improvement.

**Step 1: Improvement Goals:** These are the goals related to areas of concern to be improved and addressed:

1.
2.
3.
4.
5.

**Step 2d: Detail Goals and Activities:** Listed below are activities that will help you reach each goal:

**Goal #1:** \_\_\_\_\_

**Activity How to Accomplish:** \_\_\_\_\_

\_\_\_\_\_

**Start Date:** \_\_\_\_\_ **Projected Completion Date:** \_\_\_\_\_

**Goal #2:** \_\_\_\_\_

**Activity How to Accomplish:** \_\_\_\_\_

\_\_\_\_\_

**Start Date:** \_\_\_\_\_ **Projected Completion Date:** \_\_\_\_\_

**Goal #3:** \_\_\_\_\_

**Activity How to Accomplish:** \_\_\_\_\_

**Start Date:** \_\_\_\_\_ **Projected Completion Date:** \_\_\_\_\_

**Goal #4:** \_\_\_\_\_

**Activity How to Accomplish:** \_\_\_\_\_

**Start Date:** \_\_\_\_\_ **Projected Completion Date:** \_\_\_\_\_

**Goal #5:** \_\_\_\_\_

**Activity How to Accomplish:** \_\_\_\_\_

**Start Date:** \_\_\_\_\_ **Projected Completion Date:** \_\_\_\_\_

**Step 3: Resources:** Listed below are resources available to you to complete your Improvement activities.

1.
2.
3.
4.



# Simple Organizational Review

**Step 4: Progress Checkpoints:** The following schedule will be used to evaluate your progress in meeting your Improvement activities.

Goal #	Checkpoint Date	Type of Follow-up	Progress Expected	Notes
1.				
2.				
3.				
4.				
5.				