

# Strategic Audit Template

**The goal of this Strategic Audit Template is for you to uncover how your organization can advance to the next level as fast as possible.**

This Strategic Audit Template is a short version of the full strategic audit/assessment we offer. It gives you valuable insights and pinpoints which area/s will provide you with the most return-on-investment when given extra attention.

By answering the eight questions in the table below, you have the opportunity to gain a fresh, well-rounded perspective on your business or organization.

Each of the eight Strategic Audit Categories comes with an overall question:

**How well you think your organization is doing in that category?**

Please estimate a rating on a scale of 1-10 (10 = best). In the fourth column of the table, we give you a few more questions to consider for each category as you develop an overall rating.

It should **not take more than a few minutes to fill it out.**

I invite and encourage you to email this assessment to me ([DrStephie@TopNotchCEO.com](mailto:DrStephie@TopNotchCEO.com)) and receive a free 15-minute conversation about it. We can give you a visual representation of your assessment as well.

<b>Strategic Audit Category</b>	<b>Overall Question</b>	<b>Rate this aspect</b> <i>Use a scale of 1-10 (10=best)</i>	<b>Questions to Help You Rate</b> <i>These questions help you to reflect and estimate an overall rating for this Strategic Audit Category</i>	<b>Space for You</b> <i>Jot down your thoughts and ideas</i> <i>A suggestion: Write down what you would do if you had a "magic wand" that could accomplish <u>one thing</u> in this area; what would it be?</i>
<b>Vision, Mission, Legacy</b>	<p><b>How well has your organization defined and put into action its MISSION?</b></p> <p>An ideal mission statement is short and memorable and tells the world what your purpose is.</p>		<ul style="list-style-type: none"> <li>• Do you have a mission statement?</li> <li>• Is it memorable?</li> <li>• How familiar is everyone in your organization with the mission? Do they know it by heart?</li> <li>• How much do you use it as a "compass needle" to steer your daily activities?</li> </ul>	
	<p><b>How well has your organization defined and put into action its VISION?</b></p> <p>The vision statement contains your vision for your organization's future. It is detailed, and parts of it might be confidential.</p>		<ul style="list-style-type: none"> <li>• Do you have a vision statement?</li> <li>• How long has it been since you have looked at it?</li> <li>• Is it up-to-date?</li> <li>• To what extent are your actions in alignment with your vision?</li> </ul>	
	<p><b>How sustainable is your organization? To what extent do you have plans to create a LEGACY?</b></p>		<ul style="list-style-type: none"> <li>• How future-proofed is your organization?</li> <li>• Which key people are near retirement?</li> <li>• To what extent have you prepared for transferring critical knowledge, especially expertise that is only in someone's brain and not otherwise documented?</li> <li>• How well prepared is your company to deal with a critical person being gone or absent for a long time without notice?</li> <li>• To what extent has the current owner/s contemplated what legacy he/she/they want to leave behind?</li> <li>• Which risks do you see, and how could you mitigate them?</li> </ul>	

<i>People</i>	How well do the people dynamics function in your organization?		<ul style="list-style-type: none"> <li>• How would you describe the people in your organization concerning <ul style="list-style-type: none"> <li>○ Leadership</li> <li>○ Team spirit and harmony</li> <li>○ Integrity</li> <li>○ Accountability</li> <li>○ Efficiency</li> <li>○ Communication</li> <li>○ Knowledge and skills</li> <li>○ Workload</li> <li>○ Well-being</li> <li>○ Handling of conflict</li> </ul> </li> <li>• What is working best; what could be improved?</li> </ul>	
<i>Work Environment</i>	To what extent does your work environment support your organization's people in accomplishing their job?		<ul style="list-style-type: none"> <li>• Are your people happy with their work environment?</li> <li>• How functional, uplifting, and efficient is it?</li> <li>• To what extent does it support focused work and well-being?</li> <li>• What is working best; what could be improved?</li> </ul>	
<i>Finance</i>	How satisfied are you with the organization's finances?		<ul style="list-style-type: none"> <li>• How profitable is your organization? What is your profit margin?</li> <li>• How does your organization's key financial indicators compare to your competitors?</li> <li>• What is working best?</li> <li>• What needs improvement?</li> </ul>	
<i>Operations</i>	How well do the operations work?		<ul style="list-style-type: none"> <li>• How organized and systematized are your operations?</li> <li>• If your organization is in <ul style="list-style-type: none"> <li>○ Providing a service: How happy are your customers? How efficient are you in delivering your services?</li> <li>○ Research and Development: How well are you meeting your development targets? How happy are your investors/sponsors?</li> </ul> </li> <li>• To what extent is your organization considered "best-in-class?"</li> <li>• What is working best; what could be improved?</li> </ul>	

<p><i>Sales &amp; Marketing</i></p>	<p>How well do your sales &amp; marketing efforts function?</p>		<ul style="list-style-type: none"> <li>• How well are your marketing and sales efforts integrated?</li> <li>• To what extent have you modernized your approach to sales and marketing via <ul style="list-style-type: none"> <li>○ Incorporating an online strategy?</li> <li>○ Implementing or updating systems?</li> <li>○ Pivoting to adapt to changes in the industry?</li> </ul> </li> <li>• How happy are you with the way you price your services or products?</li> <li>• How many clients/customers do you have?</li> <li>• How much repeat business do you get?</li> <li>• What is working best; what could be improved?</li> </ul>	
<p><i>Systems</i></p>	<p>How systematized are the activities in your organization?</p>		<ul style="list-style-type: none"> <li>• How well is your company's expertise/intellectual capital documented and trainable (or to what extent is critical knowledge in the brains of key people on your team)?</li> <li>• To what extent are policies, procedures, and processes documented?</li> <li>• How happy are you with the integration of systems you use?</li> <li>• What is working best; what could be improved?</li> </ul>	
<p><i>Training</i></p>	<p>How well does your organization train its people?</p>		<ul style="list-style-type: none"> <li>• How much focus does your organization place on training both new and existing team members?</li> <li>• To what extent do you <u>systematically</u> educate your clients/customers or prospects about questions they have?</li> <li>• What is working; what could be improved?</li> </ul>	