



ORGANISATIONAL DIAGNOSIS QUESTIONNAIRE

PRIVATE & CONFIDENTIAL

The following questionnaire is split into four parts – each asking for a different set of information. Some, you will be able to complete relatively quickly. Others, you will need to go and do some research before you get back to us. It's okay to split it down and send it back to us separately, providing you make the name of your organisation clear on each section.

We use the information you provide us to better help you. Refer to the Business Gym document, **Building Better Business** for details about how the Business Gym model works, and why we ask for the information in this questionnaire.

You can be assured that the information you provide us will be treated in **confidence**. We repeat this statement throughout this document. The only people who will have access to the information you provide us are those within the Business Gym who are directly involved with your business. The only people with whom we will discuss specifics about your business are those who are identified by you. The rest of this is a confidential discussion between you and us. For learning purposes, we may ask you if we can write case studies based on your business. Where we do this we will ensure that neither you nor your business can be identified, unless you give us permission to do so.

PART 1

BACKGROUND INFORMATION

1. Information about your business. Complete the following information about your organisation. The boxes will expand as required to enable you to fit as much information in as you can.

1	Name of Organisation.	
2	Type of Organisation – e.g. Ltd., Plc., Partnership, Charity, etc.	
3	What best describes the type of business you are in?	
4	Country in which your organisation is registered	
5	Company Registration Number (if applicable).	
6	Registered Address:	
7	Name of Subsidiary using Business Gym (if different)	
8	Name of Parent Company (if different)	
9	Contact Telephone Number	
10	Fax Number	

11	Email Address	
12	Web address	WWW.
13	Name of Senior Sponsoring Director	
14	Name of Sponsoring Manager	
13	Number of Employees	

2. What are your biggest income-generating lines? From which parts of the business do you derive the most income? Complete the grid, below, giving details of your best-selling lines. There are 15 rows in this table. You can put in additional rows if you wish to tell us about more lines.

Period the Income Refers to (how many months)	Quarters/Months/Weeks
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	Income Line Descriptor	Income	Costs	Unit Price	Units Sold
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					

12					
13					
14					
15					
	TOTALS				

3. In the next grid, insert some further information that you will find on your balance sheet, or schedule of annual accounts.

1	Earnings before Interest & Tax	
2	Earnings after tax	
3	Value of Fixed Assets	
4	Value of Current Assets	
5	Value of Current Liabilities	
6	Value of Long-Term Liabilities	

This information is **confidential**. We will only use it to help us understand your business better, and to help you to appreciate how each product or service line performs within the context of your overall business.

The grids, above, have been designed in Microsoft Word format, so you can fill in the numbers on your computer. We have also formatted it with larger size boxes so you can print the form off and complete it by hand. If you choose the latter, please ensure that you write in **black ink** and that you use **block capitals**.

PART 2

HOW EFFECTIVE IS YOUR BUSINESS?
SELF-ANALYSIS

In the questionnaire that follows, there are 49 statements, followed by 7 boxes marked O, and A through F. Put a mark in the box that best describes your organisation's approach to each statement. Be as honest as you can. We will use the information you give us to form the basis of your development plan.

FOR EACH STATEMENT, ONLY TICK ONE BOX

The scoring grid is defined as follows:

- O** This is not relevant to us.
- A** We do not do this. This is definitely not true.
- B** We rarely do this – infrequent, from time to time. This is rarely true.
- C** We sometimes do this – from time to time, normally in response to something happening. This is sometimes true.
- D** We do this from time to time, more often than not – it is reactive. This is occasionally true.
- E** We frequently do this – often reactively, in response to something. This is often true.
- F** We usually do this – it is something that we typically do as part of our normal working. This is definitely true.

SECTION 1: STRATEGY & VISION

How well does your organisation plan for the future? Do you have a vision for how your organisation will develop, and a plan for how you will reach your goals?

No	Statement	Not Relevant	A	B	C	D	E	F
1	We have both strategic and business plans in place.							
2	We review the relevance of our strategy and vision.							
3	We review the business' progress against strategy.							
4	We monitor the competence of our organisation to deliver strategy							
5	We ensure that our organisation is healthy – finance, people, etc.							
6	We grow the value of our organisation							
7	We communicate our strategy and vision to appropriate stakeholders							

SECTION 2: ORGANISATIONAL PROCESSES

How effectively do you get goods and/or services from the drawing board to your customers? Are your organisational processes both efficient and effective, are they subject to continuous programmes of improvement, and do you effectively communicate with each other?

No	Statement	Not Relevant	A	B	C	D	E	F
8	We have defined quality – and are working to improve it.							
9	We have effective processes in place to deliver our business.							
10	We have efficient processes in place to deliver our business.							
11	Processes are integrated across our organisation.							
12	We continuously improve our processes.							
13	We continuously improve our overall products or services.							
14	We have effective communication about our processes.							

SECTION 3: BUSINESS SYSTEMS

How do you know how each part of your business is performing? Do you have effective information systems that tell you which parts are working, and which are not?

No	Statement	Not Relevant	A	B	C	D	E	F
15	We have effective planning in place across our organisation.							
16	We have robust financial systems in place.							
17	We have routine monitoring of our business systems.							
18	We have a high quality information system that tells us what we need to know.							
19	We have effective risk management systems in place.							
20	We have effective business control systems in place.							
21	We actively develop our organisation's memory.							

SECTION 4: PEOPLE

How effective are you at getting the right people into positions, and then developing their knowledge and skills so that you can maximise the contribution each makes to your business?

No	Statement	Not Relevant	A	B	C	D	E	F
22	We have effective recruitment systems in place.							
23	We continually develop the competence of our people.							
24	We have an effective performance management system in place.							
25	We have effective mechanisms for our staff to give feedback to management.							
26	We develop our teams, in terms of skills, knowledge and attitude.							
27	We have a robust set of Human Resources Policies and Procedures.							
28	We effectively communicate with our staff.							

SECTION 5: CUSTOMERS, SUPPLIERS & THE PUBLIC

How connected are you to your customers, suppliers and the market in general? Do you have a handle on how satisfied they are in dealing with your organisation? How effective are you at attracting new customers, whilst retaining existing ones?

No	Statement	Not Relevant	A	B	C	D	E	F
29	We measure 'customer experience' of dealing with our organisation.							
30	We monitor how stakeholders perceive our organisation.							
31	We routinely collect, monitor and evaluate customer feedback.							
32	We are effective at communicating with customers, suppliers and the market.							
33	We are aware of, and manage, our organisational body language.							
34	We are effective at retaining existing customers.							
35	We are effective at attracting new customers.							

SECTION 6: BUSINESS ENVIRONMENT

What do you know about the environment in which your organisation operates – from political influences, to the state of the economy? How well do you understand your customers, and what their needs and aspirations are?

No	Statement	Not Relevant	A	B	C	D	E	F
36	We monitor and review external political influences on our organisation.							
37	We monitor and review external economic influences on our organisation.							
38	We monitor and review other external influences on our organisation.							
39	We conduct and review regular market analyses.							
40	We monitor and review the market demographics relevant to us.							
41	We monitor and review technological developments in our market.							
42	We have an excellent understanding of our 'competitors' – others in the market.							

SECTION 7: VALUES & CULTURE

Sitting at the heart of your organisation are its values and its culture. What do your values say about you (if anything), and do you have a culture that properly supports your values?

No	Statement	Not Relevant	A	B	C	D	E	F
43	We have defined and published our organisation's values.							
44	We concentrate our energy on what matters most to our organisation.							
45	The culture of our organisation fully supports our published values.							
46	We have developed our own highly-effective 'Company Way'.							
47	We regularly review and renew our organisation's values.							
48	We encourage staff and other stakeholders to challenge us on our values.							
49	We effectively communicate our values inside and outside the organisation.							

Ensure that you have completed each section. We will treat any statements that are not marked as "Not Relevant".

We will use your self-analysis as the basis of a development strategy that we will propose to you. It is important that you complete your answers as honestly as possible. Your returns to us will be treated in the **strictest confidence**, unless you give us explicit permission to share it. We will not share this with anyone inside our company not directly connected with this project. Nor will we share it with anyone in your company other than you. Finally, we will not share this with anyone outside our organisation, unless you specifically give us permission to do so.

PART 3

VALUE-ADDING and VALUE-CREATING ACTIVITIES

This section is best undertaken by multiple members of your team, working separately. You may wish to make copies of the pages in this section, and distribute them to people you wish to involve. In this section, we want to get a sense of what you perceive to be the most value-adding, or value-creating activities that your organisation undertakes. There are three categories of value-adding, and value-creating activities:

- **CATEGORY A:** Those activities for which you get **paid** – the things that you would normally expect a business to do; e.g. the production and sale of goods and services. Things that put money onto your balance sheet – add to the bottom-line, etc.
- **CATEGORY B:** Those activities that you do because they add to the body of **knowledge**, e.g. undertaking continuous professional development, undertaking market research activities. Also included in this category are things that add to the overall knowledge of the organisation, not just its individuals.
- **CATEGORY C:** Activities you do because they are **good things to do**, but that don't add to either the financial health, or knowledge of the business – e.g. charitable, or community activities, giving staff time off for things that you are not required by law to do, etc.

Together, make a list of all the activities you do as an organisation that you would consider to be value-adding or value-creating. Put as many things down as you can.

Working individually – or together as a team if you prefer, grade each activity according to how much value it adds or creates to each of the three categories listed, above. Use a scale of 0-100 (where 0 = adds/creates no value, and 100 indicates that the activity creates a huge amount of value) for **each** category. It is possible, for example, that an activity adds value to more than one category (e.g. something might put money on the bottom line **and** add to knowledge, so you could score both sections on the 0-100 scale).

Follow the instructions on the grid, overleaf, and calculate an **overall score** for each activity. Multiply each score in CATEGORY A by **0.8**, each score in CATEGORY B by **0.15**, and each score in CATEGORY C by **0.05**. Put these new values in the boxes, and then add these up to give you a weighted score – which you should insert in the **RIGHT** hand box.

Where you have done this individually, aggregate the scores from each individual, and bring them together as an overall-overall score for each.

Rank each activity according to how well it scored – with those activities that scored the most at the top of the list, and those that scored least further down. You have now created a list of **activities that YOU and YOUR TEAM consider to be the most important to your organisation – e.g. the activities from which your organisation derives most of its value**. List these on the second grid.

RANKED VALUE-CREATING AND VALUE-ADDING ACTIVITIES GRID – SELF PERCEPTION

RANK	ACTIVITY	AGGREGATED SCORE
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		

PART 4 WHAT YOU SPEND YOUR TIME DOING

Go back to your master list of activities that you undertake as a business. In this section, you will measure the amount of time that you and your colleagues spend on each of these activities **AND** all other activities that you do during the day. The purpose of this exercise is to develop a better understanding of whether **you spend time focusing on activities that matter**.

The best way to complete this section is to run a diary exercise for a period of time. The longer the period, the more accurate the results are likely to be. We would recommend that the **minimum time** should be 1 week. You should aim to measure this activity for around 1 month if possible. All the better, if you can develop a diary system that measures this information on an on-going basis over time, but that does not get in the way of doing your normal jobs.

On the next page is a sample blank diary, that you can adapt for this purpose. Ask everyone in the business to complete a diary outlining how they spent their day. We have divided each day into four periods of time – two in the ‘morning period’ and two in the ‘afternoon period’. This is based on normal working hours. For shift workers, you would need to alter this.

Wherever you can, codify each activity, and ensure that everyone uses the same codes.

Name of Employee:

Department, Team, Location:

Activity for Week Commencing:

In each period's box, insert the activities you were working on, and the approximate amount of time you spent on it. Wherever you can, record the activity code for each. It's okay to add rows as appropriate, so that you can record **everything** you do.

	MORNING PERIOD			AFTERNOON PERIOD		
	ACTIVITY	CODE	UNITS	ACTIVITY	CODE	UNITS
MONDAY						
TUESDAY						
WEDNESDAY						
THURSDAY						
FRIDAY						
SATURDAY						
SUNDAY						
TOTAL UNITS						

