

Measuring for Peak Performance Checklist

This questionnaire by Roger Haggerty of The Interlochen Group is used to gauge your ability to achieve peak performance in your organization. rhaggerty@interlochengroup.com ; www.interlochengroup.com

Name, Company, Email:

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The Mission

1. Have you defined your overall business objectives?

- Yes
- No

2. Have you identified the strategies you will need to achieve the overall objectives?

- Yes
- No

3. Have you put together the tactical plan that will support your strategic initiatives?

- Yes
- No

4. Have you allocated the resources (people & capital) necessary to achieve your overall business objectives?

- Yes
- No

How many questions did you answer yes (calculate & record before clicking next)

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Getting There

1. Does your company use budgets (profit-and-loss statements, cash-flow and capital expenditures) as an integral part of your planning process?

Yes

No

2. Does your budget process have the support of your key managers?

Yes

No

3. Does your budget include a write-up on how the plan will be achieved?

Yes

No

4. Do you belong to trade organizations that publish key financial indicators for your industry?

Yes

No

5. Do you compare your results to published information on your industry and do you incorporate that information into your budget process?

Yes

No

6. Do capital budget items over \$10,000 have a required ROI time frame?

Yes

No

7. Do all employees know what their roles are in achieving the financial plans of the company?

Yes

No

How many questions did you answer yes (calculate & record before clicking next)

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Reporting

1. Have you identified key performance indicators and do you get timely information on those indicators?

- Yes
- No

2. Are your financial results shared with your management team and reviewed in a timely fashion?

- Yes
- No

3. Is your management team required to commit to specific steps to correct budget shortfalls?

- Yes
- No

4. Do you report current results against plan and last year?

- Yes
- No

5. Do you update your plan based on trends?

- Yes
- No

6. Do you use the trailing 12 months indicators to measure results?

- Yes
- No

7. Do you report on actual ROI versus planned ROI for Capital Items requiring ROI?

- Yes
- No

How many questions did you answer yes (calculate & record before clicking next)

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Rewards

1. Are your key managers compensated based on exceeding their specific performance indicators?

- Yes
- No

2. Do all employees participate in a bonus plan based on exceeding the planned budget?

- Yes
- No

3. Are all employees encouraged to participate in profit improvement initiatives by contributing suggestions for ways to increase profits?

- Yes
- No

4. Do you discourage activities that do not have a direct or indirect impact on achieving the financial plan?

- Yes
- No

How many questions did you answer yes (calculate & record before clicking next)

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Rating Your Answers

Calculate the total number of "Yes" answers from the previous pages.

17 or more "Yes" answers -- Congratulations. You should meet your company objectives.

12-17 "Yes" answers -- You have potential, and the chance to meet your company objectives.

Fewer than 12 "Yes" answers -- Your luck is better than your business acumen. If you achieve your objectives, it is more miracle than management.

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