



Workforce
Cultivation

Grow Your Business Success Intentionally

Leadership
Development

A Comprehensive Needs Assessment

This assessment is designed to give you a fresh perspective on your organization. Feel free to use this on your own or let us know if we can help!

Internal
Operations

Name: _____

Company: _____

Date: _____

External
Relationships



Immediate Action

Rank these key areas of business where you see the most urgent need for change or improvement. (Rank in an A,B,C,D,E order with A being most important.)

- Organization
- Management development
- People management and accountability
- Sales development and sales management
- System development and better controls

Leadership/Executive Skills

This list addresses the importance of your self-development as the leader, planner, and chief decision-maker. Indicate your choice of the top four items you would work on, if you had plenty of time.

Check up to four - - - **only four.**

- | | |
|--|---|
| <input type="checkbox"/> Developing subordinates | <input type="checkbox"/> Problem solving |
| <input type="checkbox"/> Evaluating performance | <input type="checkbox"/> Defining and clarifying roles |
| <input type="checkbox"/> Making decisions | <input type="checkbox"/> Improving delegation |
| <input type="checkbox"/> Using feedback | <input type="checkbox"/> Improving team effort |
| <input type="checkbox"/> Developing inter-personal relations | <input type="checkbox"/> Impact on others |
| <input type="checkbox"/> Improving goal setting and planning | <input type="checkbox"/> Getting solid input from key employees |



Business Priorities

Rate the following as to where you would like to see improvement regarding the business.

Scale is:
 4 very important
 3 important
 2 slightly important
 1 not certain
 0 does not apply

	Importance to You				
	0	1	2	3	4
1. More sales/higher profitability.	0	1	2	3	4
2. Less costly mistakes.	0	1	2	3	4
3. Better or more product/service.	0	1	2	3	4
4. Employees focused on customers.	0	1	2	3	4
5. Develop stronger managers.	0	1	2	3	4
6. Develop a 12 to 18 month growth plan.	0	1	2	3	4
7. Clarify the thinking and unity of your top group.	0	1	2	3	4
8. More consistent results.	0	1	2	3	4
9. More employee involvement/cooperation/caring.	0	1	2	3	4
10. Other: _____					



Sales and Marketing Development

Rate the following as to where you would like to see improvement regarding the business.

Scale is:

4 very important

3 important

2 slightly important

1 not certain

0 does not apply

	Importance to You				
	0	1	2	3	4
1. Upgrading the performance of the sales force.	0	1	2	3	4
2. Creation of a goals-centered sales plan.	0	1	2	3	4
3. Position the firm for the future.	0	1	2	3	4
4. A motivational way to train salespeople.	0	1	2	3	4
5. Develop a stronger sales manager.	0	1	2	3	4
6. Improve how sales people are hired/qualified.	0	1	2	3	4
7. Create a true customer service mindset/process.	0	1	2	3	4
8. Determine major account strategy.	0	1	2	3	4
9. Create a selling system.	0	1	2	3	4
10. Develop higher sales standards for salespeople.	0	1	2	3	4



Management and Organization Development

Rate the following as to where you would like to see improvement regarding the business.

Scale is:
 4 very important
 3 important
 2 slightly important
 1 not certain
 0 does not apply

	Importance To You				
1. Improving employee morale.	0	1	2	3	4
2. More time to spend working on the business.	0	1	2	3	4
3. Everyone knows their accountabilities.	0	1	2	3	4
4. More effective decision making, better decisions.	0	1	2	3	4
5. A process for hiring or promoting the right people.	0	1	2	3	4
6. A process for enforcing company policies while keeping spirits high.	0	1	2	3	4
7. A way to improve communication across the company.	0	1	2	3	4
8. Job descriptions for every position with pinpoint accountabilities.	0	1	2	3	4
9. A unified approach to performance management, development and results for all lead people.	0	1	2	3	4
10. Develop a better way to identify the true issues and opportunities facing the business.	0	1	2	3	4



11. Develop 30, 60 and 90-day performance targets to provide direction and maintain momentum. 0 1 2 3 4

People Development & Accountability

Rate the following as to where you would like to see improvement regarding the business.

Scale is:
 4 very important
 3 important
 2 slightly important
 1 not certain
 0 does not apply

	Importance To You
1. Improving employee morale.	0 1 2 3 4
2. Developing a results-oriented culture.	0 1 2 3 4
3. Creating a more practical way to evaluate employee performance.	0 1 2 3 4
4. Establishing a solid relationship between employees and managers.	0 1 2 3 4
5. Creating a method to terminate employees without the emotionalism.	0 1 2 3 4
6. Interviewing, evaluating and selecting employees who will best meet job demands.	0 1 2 3 4
7. Creating a climate of high employee responsibility and accountability for their own performance.	0 1 2 3 4
8. Eliminating conflict.	0 1 2 3 4



9. Increasing employee involvement and commitment to the changes you need to make. 0 1 2 3 4
10. Reduce/eliminate the “disconnects” between departments and individuals. 0 1 2 3 4
11. Increase performance standards and still keep morale high. 0 1 2 3 4

Personal Priorities

Rate the following as to where you would like to see improvement regarding the business.

Scale is:
 4 very important
 3 important
 2 slightly important
 1 not certain
 0 does not apply

- | | Importance
To You |
|--|------------------------------|
| 1. Be able to do more with my family. | 0 1 2 3 4 |
| 2. Improve the focus and direction as to where the business is heading. | 0 1 2 3 4 |
| 3. Live a more authentic life and still run this business. | 0 1 2 3 4 |
| 4. Develop self as a stronger, more effective leader of people. | 0 1 2 3 4 |
| 5. Build better relationships. | 0 1 2 3 4 |
| 6. Gain more fulfillment, personal success and satisfaction through my business. | 0 1 2 3 4 |



7. Make more money and enjoy it. 0 1 2 3 4
8. Have more time for other interests, pursuits. 0 1 2 3 4
9. Gain better control over the business without being fried by overwork and stress. 0 1 2 3 4
10. Continue to grow and develop as a person. 0 1 2 3 4
11. Have the independence to do things the way I want to do them. 0 1 2 3 4
12. Re-discover my passion, purpose and energy. 0 1 2 3 4