LCT
Organizational
Design Group

Organizational Assessment Toolkit

Part 1: Background & How-To Guide

When core organizational systems aren't clearly defined or consistently practiced, the impact shows up quickly in day-to-day work. Leaders spend more time clarifying decisions, resolving misunderstandings, and stepping into work that should be handled elsewhere. Teams experience role confusion, inconsistent processes, missed handoffs, and meetings that feel repetitive rather than productive. Over time, this creates frustration, burnout, and a constant sense of firefighting, even in otherwise successful organizations.

Because these issues often develop gradually, they can be difficult to spot without intentionally stepping back. Periodically assessing your internal structure helps surface where informal workarounds have replaced clear systems and where growth or change has outpaced existing processes. This assessment is designed to provide that checkpoint, allowing leaders to objectively evaluate whether their organization is set up to operate smoothly, stay aligned, and sustain performance as demands evolve.

This assessment helps business leaders evaluate the strength and consistency of their internal organizational systems across **five critical focus areas** that directly impact performance, clarity, and sustainability:

- **Leadership & Alignment Focus:** How clearly leaders define priorities, make decisions, and stay aligned around goals.
- **Accountability & Role Clarity:** How well roles, responsibilities, and ownership are defined and understood across the organization.
- **Processes & Workflow Standardization:** The extent to which core work is documented, repeatable, and consistently executed.
- **Internal Communication & Rhythm:** How information flows, meetings are structured, and updates are shared to keep teams aligned.
- **Strategic Planning & Readiness:** How effectively the organization plans, reviews progress, and prepares for future growth and risk.

Testing Instructions:

The testing steps included with each control are intentionally **specific and tactical**. This approach ensures you are measuring organizational strength consistently over time, rather than relying on assumptions or general impressions. Clear evaluation criteria make it easier to spot patterns, compare results quarter over quarter, and translate insights into practical, actionable improvements.

1. Read the control statement
2. Follow the “How to Test” guidance to evaluate your current state
3. Rate each control from **1 (not in place)** to **5 (fully in place and functioning successfully)** based on the current state of your organization.
4. Add notes to capture examples, gaps, or ideas
5. After completing the assessment, use the recommended actions and action plan template to guide quarterly or annual planning

Time Commitment & Best Practices

This assessment can be completed in two ways, depending on how deeply you want to engage with the testing steps. A **45–60 minute version** works well for a single leader completing the assessment independently using existing knowledge and documentation. For the most accurate and actionable results, many organizations choose the **2–3 hour version**, which includes reviewing materials, speaking with a few team members, and completing the tactical testing steps as designed. Both approaches provide valuable insight, but the deeper version offers a more complete picture to support quarterly and annual planning.

Best Practices for Completing the Assessment:

- Block uninterrupted time and treat this as a planning exercise, not a task to squeeze in.
- Score each control based on what is actually happening today, not what should be happening.
- Resist the urge to fix issues as you go; the goal is to assess the current state, not solve problems in real time.
- Use the notes sections to capture observations, examples, and ideas.
- Look for patterns across focus areas rather than aiming for perfection.
- Use the results to identify 2–3 priorities to address through intentional planning.

Part 2: Assessment

	Control	How to Test	Score	Notes
Pillar 1: Leadership Alignment & Focus	1. Leadership team has clear annual priorities	Ask each leadership team member to list the top 3–5 annual priorities. Compare responses for alignment and consistency.	Not Rated	
	2. Quarterly goals/KPIs exist and are visible	Review quarterly goals in your system, dashboard, or shared workspace. Confirm they are documented, accessible, and reviewed during meetings.	Not Rated	
	3. Leaders meet on a predictable cadence	Review the last 8–10 weeks of leadership calendars to confirm meetings occurred consistently and followed an agenda.	Not Rated	
	4. Decisions follow a consistent process	Select 2–3 recent decisions and trace how they were made. Look for a repeatable structure (criteria, inputs, owner, timeline, communication).	Not Rated	

Pillar 2: Accountability & Role Clarity	5. Every role has a clear job description	Interview 3–5 employees and ask them to describe their primary responsibilities in their own words before reviewing their job description. Then compare their responses to the documented role expectations and recent changes in the role. Ask: • *"What tasks are you handling today that aren't reflected in your job description?"* • *"What responsibilities listed here are you not consistently able to get to?"* Look for patterns of role drift, workload imbalance, or unclear ownership.	Not Rated	
	6. Org chart accurately reflects how work gets done	Compare the current org chart to actual workflows. Interview employees to confirm who they report to, who they collaborate with, and whether informal structures override formal ones.	Not Rated	
	7. Job descriptions are easily accessible and actively used to clarify expectations, priorities, and performance.	Verify job descriptions are stored in an accessible location. Ask 3–5 employees if they know where to find their job description and when they last used it. Ask managers how job descriptions are used in onboarding or performance discussions. Limited awareness or use indicates gaps.	Not Rated	
	8. KPIs/metrics tied to roles are documented	Review each role's KPIs. Confirm that they: • exist in writing • are tied to responsibilities • are reviewed at least monthly	Not Rated	

Pillar 3: Processes & Workflow Standardization	9. Core processes are documented (SOPs)	Review 3–5 critical processes. Confirm documentation includes steps, owners, required tools, and success criteria.	Not Rated	
	10. Team follows documented processes	Shadow a workflow or observe a working session. Compare what team members do with the documented process. Note where steps are skipped, improvised, or outdated.	Not Rated	
	11. Handoffs between departments are clear	Select 2–3 cross-team handoffs, verify the handoff steps are documented and consistently followed, and assess whether downstream teams can use the information without rework, clarification, or data cleanup.	Not Rated	
	12. Tools and systems are used consistently	Pull system usage logs (CRM, PM tool, HRIS). Compare entries across team members to confirm consistent use, naming conventions, and data completeness.	Not Rated	
Pillar 4: Internal Communication & Rhythm	13. Weekly team meetings follow a consistent agenda	Review agenda templates and past 4–6 weeks of meeting notes. Confirm structure, follow-ups, and accountability sections.	Not Rated	
	14. Leaders provide consistent updates	Examine communication channels (Slack, email, dashboards). Verify that leaders provided weekly or biweekly updates tied to metrics, priorities, or decisions.	Not Rated	
	15. Issues are captured and resolved systematically	Review your issue-tracking system or meeting notes. Confirm that issues are logged, prioritized, assigned, and resolved using a consistent method.	Not Rated	

	16. Clear communication channels are defined	Review your internal communication guide (or create one). Ask employees what tools they use for: • announcements • collaboration • decisions • urgent issues Compare responses for alignment.	Not Rated	
Pillar 5: Strategic Planning & Readiness	17. Annual planning is completed intentionally	Confirm that annual planning included inputs (data, KPIs, retros), facilitated sessions, documented plans, and assigned owners.	Not Rated	
	18. Quarterly planning reviews progress	Review quarterly planning artifacts. Check whether previous quarter's goals were evaluated and whether new goals reflect learnings or shifts.	Not Rated	
	19. Operating model supports future growth	List the top 5 recurring workflows (e.g., onboarding, fulfillment, reporting). For each, assess: • Is the process documented? • Can team members complete it without owner involvement? • How many errors, delays, or rework cycles occurred in the last 90 days? Processes requiring frequent owner fixes or oversight signal gaps.	Not Rated	
	20. Leadership proactively addresses risks	Review risk logs, project plans, or meeting notes for the past 6–8 weeks. Confirm risks were identified early, assigned owners, tracked, and followed through.	Not Rated	
		Total		

Part 3: Recommended Actions

The recommendations that follow are intended to help you translate your assessment results into focused, practical next steps. Use your scores and notes to identify the areas with the greatest opportunity for improvement, then review the corresponding recommendations to understand where to focus first.

The goal is not to address everything at once, but to select **two to three priority areas** that will reduce friction, improve clarity, and strengthen your organization over time. These recommendations are designed to guide planning discussions and inform your action plan.

Recommended Actions Based on Score:

0–49 = REACTIVE STAGE (High Risk)	50–79 = TRANSITION STAGE (Needs Strengthening)	80–100 = PROACTIVE & STABLE (Optimize & Maintain)
Recommendation: Immediate organizational design support is recommended. Priorities: • Leadership alignment • Job descriptions & org chart • Process documentation • Weekly/monthly operating rhythms • Clear accountability structures	**Recommendation:** Prioritize quarterly improvement projects. Priorities: • KPI development • SOP refinement • Communication standards • Cross-department handoffs • Leadership meeting cadence	**Recommendation:** Focus on optimization and strategic planning. Priorities: • Annual and quarterly planning • Succession planning • Performance systems • Scaling readiness projects

Recommended Actions Based on Focus Area:

Structural Clarity	Operational Consistency	Leadership Alignment	Performance & KPIs	Communication & Decision Pathways
Update or redesign org chart Clarify roles and decision-making ownership Define or refresh job descriptions	Create, update, or standardize SOPs Identify redundant steps and streamling processes Implement shared templates for consistency	Introduce quarterly leadership planning cadence Establish shared priorities and accountability Set communication expectations and rhythms	Build or refine KPIs for key roles Create monthly or quarterly reporting cadence Align KPIs with strategic goals	Improve how information flows across teams Clarify when to escalate vs. when to own decisions Introduce operating norms and meeting structure

Part 4: Action Plan Template

Use this Action Plan to translate insights from your assessment or planning session into clear priorities, structured actions, and accountable next steps. Each priority should focus on strengthening your internal operations, leadership alignment, communication, or organizational systems.

Priority 1:

Why this matters:

Action Steps:

Action	Owner	Due Date

Resources Needed:

Success Indicators:

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Priority 2:

Why this matters:

Action Steps:

Action	Owner	Due Date

Resources Needed:

Success Indicators:

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Priority 3 (Optional):

Why this matters:

Action Steps:

Action	Owner	Due Date

Resources Needed:

Success Indicators:

-
-

Part 5: Monthly/Quarterly Check-In Notes

(Use this section during your monthly or quarterly reviews.)

Check In (Date):

What progress has been made?

What barriers or roadblocks emerged?

What adjustments are needed next quarter?

Check In (Date):

What progress has been made?

What barriers or roadblocks emerged?

What adjustments are needed next quarter?

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