

BUSINESS PLANNING ASSESSMENT INFORMATION

1. Customer or Client Assessment

- a. Decide each set of customers or clients (e.g., consumers/end users, distributors, etc.); obtain data for each.
- b. Performance Feedback:
 - (1). What constitutes the “report card” used by the customer in evaluating suppliers? Here they usually use quality, cost, schedule, financing/payment terms, packaging, delivery modes, etc. What specifically are their evaluation elements and in what order of priority?
 - (2). How do your customers score or grade your organization for each element?
 - (3). What is the nature of your relationship with them? What, from their perspective, would improve that relationship?
 - (4). What else, if anything, can your organization do to improve its products, services, or any other aspect of the relationship?
- c. Marketing:
 - (1). How does the customer define “value”? Value is usually NOT simply quality, cost or schedule. It is usually “utility”... the need or want being satisfied.
 - (2). What will your customers need or want in the future? What elements of their future planning could or should you be planning to supply?
 - (3). What problems do they have that they want solved?
 - (4). What do your customers see in your industry or market that would be beneficial for you to consider in your planning?
- d. What message or “positioning” concerning your company do you want to convey to them while obtaining the assessment data?

2. Supplier Assessment

- a. What are the elements of their “report card” and in what order of priority?
- b. What is the nature of your relationship from their perspective?

- c. How do they score or grade your organization?
- d. How could your relationship be changed for mutual improvement or benefit?
- e. What are their future plans vis-a-vis your organization?
- f. What do they see in your industry or market that you should consider in your planning?

3. Environment Assessment

- a. What demographics most impact your business? What are the trends for these demographics?
- b. What demographic trends could impact your business and how can you use these trends?
- c. What are the dominant trends in your industry and market?
- d. What technological changes will most impact your business? How? How can you capitalize on these changes?
- e. What laws, regulations, policies or practices are currently being enacted or planned at the local, state and federal levels that will impact your business or organization? How? How will you address these?
- f. What changes in our society or culture will be affecting your business in the future? How?
- g. Are there any changes taking place in the demographics or geographic locale that will affect your work force? What will the impact be?
- h. What are your competitors doing or planning? How will they impact your customers, market, business or company?
- i. Other areas of interest or concern.

4. Organization Assessment

- (S) a. What is going well that can be continued, emphasized or built upon? What are the strengths of the organization?
- (W)b. What could or should be changed in order to increase effectiveness? What are the weaknesses of the organization?
- (O) c. What are the opportunities facing the organization that could or should be capitalized upon?
- (T) d. What are the threats facing the organization that must be addressed?

- e. An assessment of the organization that is more detailed than the “SWOT analysis” noted in 4.a. through 4.d. above could include the following areas:
- (1). Organization Purpose. This section deals with perceptions concerning “why the organization exists,” or its “reason for being”; the end results produced for customers or clients; the services and products offered, market definition and the organization's uniqueness in the marketplace.
 - (2). Vision of the Future. This section addresses perceptions concerning “where the organization is going” or “what the future holds for the organization.” These are observations concerning whether there is a known “picture” of the organization's desired future state, what the key elements of that desired future state are known to be and how this information has been acquired.
 - (3). Organization Goals and Objectives. This section deals with perceptions concerning knowledge of or understanding of the specific long-term results (“goals”) and short-term results (“objectives” for the current fiscal year) that the organization intends to achieve.
 - (4). Leadership. This section deals with perceptions of Leadership. “Leadership”, as addressed in this section, is concerned with clarification of the organization's business purpose, the development of a clear and compelling vision of the organization's future and with communication of that vision in ways that engender understanding and enthusiastic commitment to its realization by all members of the organization, and with articulation and demonstration of the values that will guide and inform the behaviors of all employees.
 - (5). Management. Here are sought perceptions on organizational management. “Management” is here concerned with the support, facilitation and oversight functions necessary to insure that day-to-day organization efforts can be executed with optimal effectiveness. These functions include: insuring that clear performance objectives are established for departments, teams and individuals; resources are appropriately allocated; impediments to desired performance are eliminated; performance feedback is provided in a timely, continuous and effective manner; plans are adjusted as necessary; continuous development of products, people and systems is maintained; order and balance are maintained and other unique needs or issues are addressed in a timely and effective manner consistent with the organization values, goals and policies.
 - (6). Structure and Relationships. In this section “structure” addresses perceptions concerning the way work is obtained, organized and executed; the major organization work-flow paths and reporting relationships; the formal and informal “ways that things get done or are expected to get done.”

- (7). Operating Values. This section deals with perceptions concerning the organization's "operating norms"; what is really important at the organization; "the way that things are done here"; behaviors desired and behaviors that will be sanctioned; behaviors that portend success or failure in the organization.
- (8). Plant, Office, Equipment and Technology. This section addresses the amount, effectiveness, quality, and availability of work space, equipment, technology and other resources used or needed in executing business operations.
- (9). Rewards and Recognition. This section deals with perceptions concerning wages, salaries, benefits, bonuses, incentives, awards, praise ... any formal or informal way of compensating or acknowledging people for their work performance or other efforts on behalf of the organization.