



Team Strategy Checklist

for _____

4 Key Qualities of a Crystal Clear Strategy

A. SIMPLICITY

Does your team have a simple and easy-to-understand strategy that everyone knows?

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|----------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|--------------------------|
| No Strategy or Complicated | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Simple Strategy in Place |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

B. CLARITY

Are all team members very clear about team goals and objectives, how you're going to achieve them, how everyone should act to enable them and your measures of success?

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| Unclear Goals and Objectives | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Clear Goals and Objectives |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

C. FOCUS

Do all team members have guidelines, metrics and accountability processes to keep them focussed on the critical activities that will help achieve strategic goals?

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| No Reminders of Critical Focus Areas | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Regular Reminders of Critical Activities |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

D. ALIGNMENT

Does your team have suite of strategically linked action plans to communicate, coordinate and connect the activities of different business units to ensure everyone is working towards the same common goals?

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| Team Not Focussed on the Same Goals | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | All Focussed on the Same Goals |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

7 High Impact Levers for a Crystal Clear Strategy

1. SIMPLE PLANNING FRAMEWORK

Does your team have a 'road map for success' with a clear and simple planning framework that is easy-to-use and understand?

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|-----------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| No Plan or Very Complicated | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Clear and Simple Plan |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

2. CLEAR STRATEGIC OBJECTIVES

Does your strategy have clear strategic objectives that include a vision, mission, values, purpose, key goals & key results areas that provide the 'big picture' for all strategies in the plan?

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| Unclear Strategic Objectives | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Clear Strategic Objectives |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

3. CLEAR TARGETS & BENCHMARKS

Do you have a 'Balanced Scorecard' that organises critical activities into a system of metrics to measure key results areas and key performance indicators for the organisation, teams and individuals. Are links to the vision, mission and key goals clearly demonstrated? Do you have data that provides benchmarks to illustrate the gap between current performance and future targets?

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| Unclear Targets and Benchmarks | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Clear Targets and Benchmarks |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

4. CLEAR EXPECTATIONS OF BEHAVIOUR

Does your strategy articulate clear expectations of behaviour through meaningful values and ground rules. Are people held accountable to those behaviours?

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| Unclear Expectations of Behaviour | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Clear Expectations of Behaviour |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

5. REGULAR PERFORMANCE FEEDBACK

Do your people get clear regular feedback about organisational, team and individual performance and results. Are there processes in place to recognise successful outcomes and processes for improvement to address poor outcomes.

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| No Feedback | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Regular Feedback |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

6. COMMUNICATE THE STRATEGY

Are all aspects of your strategy (vision, mission, values, key goals and metrics) communicated through a wide range of communication channels? Does every team member know them off-by-heart?

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| No Communication of Strategy | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Excellent Communication of Strategy |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

7. CONNECT PEOPLE TO THE STRATEGY

Does your company/team have programs, events and activities to get your team engaged, motivated and excited about their strategy? Are people made accountable for performance and results? Are people recognised when they demonstrate behaviours and are they given adequate resources to support and enable the strategy?

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| People Not Connected to the Strategy | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | People Well Connected to the Strategy |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

3 Enabling Mindsets for a Crystal Clear Strategy

i. DESIRE TO PLAN

Does your team recognise the importance of planning and allocate an adequate amount of time, energy and resources for planning?

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| Little Time and Resources for Planning | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Ample Time and Resources for Planning |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

ii. DESIRE TO MEASURE

Do your managers demonstrate that they value the use of relevant metrics to set, track and monitor individual and team performance?

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| No Desire to Measure and Track Performance | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Strong Desire to Measure and Track Performance |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

ii. DESIRE TO IMPROVE

Does your team demonstrate a desire to streamline and improve strategic planning processes?

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|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---|
| No Effort to Improve Strategic Planning | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Strong Desire to Improve Strategic Planning |
| | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |