

MANAGEMENT SELF-ASSESSMENT

The Management Self-Assessment provided extraordinary results. After an hour's training, our team spotted gaps and strengths and then agreed quickly on issues to prioritize. The comprehensive standard gave me and the board confidence nothing was overlooked. But the conversation was more important: it helped everyone see how everyone contributes to success. – Ruth Schmidt, Executive Director, WECA

Introduction

The Management Self-Assessment ensures important processes are up to date. It is easy to focus only on today's problem and overlook what's being done well. The Self-Assessment can be used to prepare for planning, developing succession or manager development plans, assessing a vendor or for franchise or dealer training.



Benefits

The Center's tools minimize omissions, improve communications and foster collaboration. The **Management Self-Assessment**:

- Creates an opportunity for managers to shine in their area of expertise
- Provides owners and board members confidence nothing is being overlooked
- Identifies outdated processes so everyone can enjoy focusing on the big things

Difficulty Easy Estimated time required 3 to 4 2-hour meetings Special skills None

Instructions

Have the Self-Assessment and The GM's Index of Terms open on a large screen. Participants should prepare by scanning the list and thinking about practices of concern.

- 1. Department heads have meetings together to review each Level 2 issue.
- 2. Assign a scribe. Put an "X" for irrelevant practices. Don't overthink the ratings.
- 3. Accept the conversation will jump from department to department.
- 4. Record things to change or stop for the high priority items.
- 5. Run the Self-Assessment every year and celebrate progress.

Members can contact the Center for assistance: info@theindex.net

Make It Better

Member should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.

MANAGEMENT SELF-ASSESSMENT
For: Acme Widget Company
By: Self
When: 4-Jun-18

Rating key

X Not critical this year

E Excellent
A Adequate
N Needs attention

HML High, Medium, Low priority

This checklist will help prioritize among the many practices that might need attention. See www.theindex.net / The CMTP Index for definitions and discussion.

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| 0.0.0 Pra | | | į. | , Š | g ² | | |
| | | ş | کی آ | أي م | Comment/Question/Project 1 | Comment/Question/Project 2 | Comment/Question/Project 3 |
| 1 | STRUCTURE | | | | | · | · |
| 1.1 | Ethics and the law | | | | | | |
| 1.2 | Market position | | | - | | | |
| 1.5 | Ownership structure | - | | - | | | |
| 1.5 | Governance Planning | | | - | | | |
| 1.6 | Facilities | | | | | | |
| 2 | MARKETING & SALES | | | | | | |
| 2.1 | Market research | | | | | | |
| 2.2 | Channels of distribution | | | _ | | | |
| 2.2.1 | Retailing | | | - | | | |
| 2.2.2 | Franchising E-commerce | | | - | | | |
| 2.2.3 | Catalog sales | | | - | | | |
| 2.2.5 | Wholesaling | | | | | | |
| 2.3 | Pricing | | | | ĺ | | |
| 2.3.1 | Pricing terms | L | | | | | |
| 2.3.2 | Fee structure | | | | | | |
| 2.3.3 | Discounts | | | | | | |
| 2.3.4 | Promotions | | | _ | | | |
| 2.4 | Marketing communications | | - | - | CANADI F | | |
| 2.5 2.5.1 | Sales management | Α. | - | - 11 | SAMPLE Training in Table of Priorities | See Market Research | Run 80/20 on customers |
| 2.5.1 | Selling Negotiations | A | E A | M | See Pricing grid | Rework standard contract | Run 3 in-house workshops |
| 2.5.3 | Sales pipeline | A | N | | Use new CRM for pipeline reporting | Increase umprompted inquiries by 20% | Null 3 III House Workshops |
| 2.5.4 | Sales territories | N | X | | ose new countries pipeline reporting | mercase amprompted inquires by 20% | |
| 2.5.5 | Sales compensation | Α | N | М | Consolidate to 3-tier system | Create cross-selling incentives | Link to 80/20 results |
| 2.6 | Customer service | | | | | | |
| 3 | OPERATIONS | | | | | | |
| 3.1 | Quality | | | | | | |
| 3.2 | Work process | | | _ | | | |
| 3.3 | Production technology | | | - | | | |
| 3.4 | Supply chain Logistics | - | | \vdash | | | |
| 3.6 | Inventory | | | - | | | |
| 4 | INFORMATION | | | _ | J | | |
| 4.1 | Applications | | | Т |] | | |
| 4.2 | Internet | | | | | | |
| 4.3 | Data and reporting | | | | SAMPLE | | |
| 4.3.1 | Database design | Е | Α | М | Begin with report calendar, below | Prepare for robotics | |
| 4.3.2 | Database integration | A | Α | М | Link CRM with ERP | Develop in-house data management expertise | |
| 4.3.3 | Reporting | N | A | H | Create report calendar | Reduce no. reports by 50% | Roll out enterprise dashboard |
| 4.3.4 | Information security Research and analysis | E | Е | L | No significant changes needed | Re-examine mid-year | |
| 4.4 | Communication System | + | - | - | | | |
| 4.6 | Information Technology | + | | | | | |
| 5 | HUMAN RESOURCES | | | _ | | | |
| 5.1 | Management | | | | | | |
| 5.2 | Organizational Structure | | | | | | |
| 5.3 | Employee Relations | | | | | | |
| 5.4 | Training and Development | | | - | | | |
| 5.5 | Compensation | - | - | - | | | |
| 5.6 6 | Recruitment and Retention FINANCE | | | _ | J | | |
| 6.1 | Financial accounting | | | T | 1 | | |
| 6.2 | Managerial accounting | | | 1 | SAMPLE | | |
| 6.2.1 | Financial analysis | N | Α | Н | See report calendar | Emphasize cost accounting | Use standard CMTP Cost/Benefit analysis |
| 6.2.3 | Business valuation | N | N | М | Must have by 2QTR for succession planning | Run Management Self-Assessment | Balance with long-term quality goals |
| 6.2.4 | Financial literacy | N | Α | М | Incorporate into orientation for staff and board | | |
| 6.3 | Budgeting and forecasting | | | | | | |
| 6.4 | Financing | _ | | - | | | |
| 6.5 | Cash management | - | - | - | | | |
| 6.6 | Risk management | | | | J | | |
| | | | | | | | |

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