

## Organizational Fitness Self-Assessment

**Give each statement a score from 1-4 (based on the scoring legend) and then total them up for each fitness category.**

	<b>STATEMENT</b>	<b>1 = Strongly disagree</b> <b>2 = Moderately disagree</b> <b>3 = Moderately agree</b> <b>4 = Strongly agree</b>
<b>I.</b>	<b>Committing to Fitness</b>	
	We have a clearly stated goal of continuous improvement for individual processes and operations within the company.	
	We have clear and well-understood metrics for improvement.	
	We view problems as opportunities for improvement.	
	People feel encouraged to identify problems, and do so freely, without fear.	
	We recognize and reward small improvements when people make them.	
	We consistently teach scientific thinking (Plan-Do-Study-Adjust) and problem solving.	
	We have a clear process for teaching PDSA thinking.	
	Leaders participate in improvement activities.	
	Leaders give people time each day/week for improvement.	
	We have a structured way of soliciting employee ideas for improvement that is <b>not</b> a suggestion box (e.g., improvement boards, daily/weekly team meetings, etc.)	
	Supervisors/managers/executives respond to employee suggestions within 2-3 days.	

	We implement most employee ideas, even if we have to modify the original suggestion with the employee.	
	<b>Total</b>	
<b>2.</b>	<b>Focus on value, not cost cutting</b>	
	We have non-financial metrics and measurements to assess our operations.	
	When face with financial pressures, we focus on improving capabilities (increasing quality, shortening lead times, etc.) instead of simply cost cutting.	
	<b>Total</b>	
<b>3.</b>	<b>Thinking Horizontally</b>	
	We segment our customers into different groups with different needs.	
	We use different systems, processes, or metrics for our different types of customers.	
	We measure and track customer satisfaction.	
	We actively ask customers for ideas about new products and services, or improvements in current products or services.	
	<b>Total</b>	
<b>4.</b>	<b>Standard Work</b>	
	All jobs have documented, up-to-date, easy to use standard work descriptions.	
	The workers doing the jobs create the standard work for those jobs.	
	Our leadership team has standard work that is clearly visible and known to all.	
	Our leaders adhere to their standard work most of the time.	

	Our leaders go to the front lines of the company (the shop floor, the accounting department, HR, marketing, etc.) as part of their regular, daily work.	
	<b>Total</b>	
<b>5.</b>	<b>Visual Management</b>	
	Most processes in our organization (e.g., product development, hiring, new client opening) have visual controls.	
	Our visual controls are regularly referred to and updated.	
	We have visual controls that show work quality.	
	We have visual controls that indicate whether a process is ahead or behind.	
	We have visual controls that show what stage the work is in (i.e., where it is in the process).	
	<b>Total</b>	
<b>6.</b>	<b>Coaching</b>	
	Our leadership team regularly coaches employees (at least several times per week)	
	Our managers and supervisors regularly coach employees (at least several times per week)	
	We have specific training and coaching around problems solving/scientific thinking.	
	We typically coach at the person's workplace.	
	We regularly evaluate the progress of the people being coached.	
	<b>Total</b>	

### **Committing to Improvement**

Your Score: \_\_\_\_\_ (Max = 48)

### **Focus on value, not cost-cutting**

Your Score: \_\_\_\_\_ (Max = 8)

### **Thinking horizontally**

Your Score: \_\_\_\_\_ (Max = 16)

### **Standard work**

Your Score: \_\_\_\_\_ (Max = 20)

### **Visual management**

Your Score: \_\_\_\_\_ (Max = 20)

### **Coaching**

Your Score: \_\_\_\_\_ (Max = 20)

## **Recommendations**

### **Committing to Improvement: You are actively embedding a mindset of continuous improvement into the fabric of the company.**

If you scored low (< 40) in this area, the leadership team has to begin modeling the desired behavior. Start your own projects—even small ones—and make them public. Show people that they shouldn't be afraid to try to solve problems. Ask people for improvement ideas, respond to them quickly, and celebrate those who make suggestions. Participate in employee improvement projects.

### **Focus on value, not cost-cutting: Your organization sees people as assets to be developed, rather than costs to be minimized.**

If you scored low (< 6) in this area, sit down a mixed group of front line workers, supervisors, and executives and brainstorm measurements that you can use to assess the performance and efficiency of your internal processes. Think about lead time, quality, and safety metrics for each process.

### **Thinking horizontally: You put the customer at the heart of your activities, and seek to tie all functions to customer satisfaction.**

If you scored low (< 12) in this area, work with a cross-functional team to segment your customer base and identify specific needs for each group. Create new (or modify existing) metrics for each department that enable you to serve those customer segments better.

**Standard work: Both front line workers and leaders create standards to enable the pursuit of excellence.**

If you scored low (< 13) in this area, ask front line workers to begin documenting their work processes and posting it on the walls in the work area. Executives, managers, and supervisors should create weekly plans for walking through the front lines of their areas and identify specific topics they'll discuss during each visit. Reviewing fundamental time management principles (such as the ones I explain in my book, *A Factory of One*) will be useful.

**Visual management: You create controls to improve adherence to standards and quality.**

If you scored low (< 13) in this area, start simple: ask each team to think of basic charts to show either production rate (in a repetitive process, like invoice processing) or status (in multi-step processes). Have people meet daily around the charts to update and discuss problems. At the outset, leaders **must** attend these meetings.

**Coaching: Leaders at all levels are committed to developing people.**

If you scored low (< 13) in this area, executives, managers, and supervisors should allocate time in their calendars each day/week for focused coaching. Because coaching is such a nuanced and subtle dialog, it's also worth studying books such as Mike Rother's *Toyota Kata* or researching the "coaching conversation model."