

STRATEGIC PLANNING & TEAM ALIGNMENT ASSESSMENT

Does your team have a shared direction - and the discipline to execute it?

Rate how consistently each statement describes your organization today. Ask leadership team members to complete this independently, then compare answers.

Scale: 1 = Never | 2 = Rarely | 3 = Sometimes | 4 = Often | 5 = Consistently

Name: _____ Company: _____ Date: _____

STRATEGIC CLARITY

Score: 1-5

1. Our leadership team shares a clear understanding of where the business is heading over the next three years. _____

2. We have agreed on a small number of measurable priorities for the next 12 months. _____

3. We use our strategic priorities to decide which opportunities to pursue - and which to decline. _____

TEAM ALIGNMENT

Score: 1-5

4. Each leader can explain how their department contributes to our company priorities. _____

5. Leaders resolve competing departmental priorities in the best interest of the business. _____

6. We openly discuss disagreements and leave meetings with clear decisions. _____

EXECUTION & ACCOUNTABILITY

Score: 1-5

7. Each strategic initiative has one accountable owner, a deadline, and a measurable outcome. _____

8. We regularly review progress and address missed commitments. _____

9. Our people have the time and resources needed to execute our priorities. _____

REVIEW & ADAPTATION

Score: 1-5

10. We track a small set of indicators that show whether our strategy is working. _____

11. We regularly step back from daily operations to review strategic progress. _____

12. We adjust our plans when evidence changes and clearly communicate those adjustments. _____

YOUR RESULTS

Strategic Clarity: ____ /15

Team Alignment: ____ /15

TOTAL: ____ /60

Execution & Accountability: ____ /15

Review & Adaptation: ____ /15

12-29: Establish a clearer shared direction and a basic execution process.

30-41: Identify gaps that make alignment and follow-through inconsistent.

42-51: Strengthen your lowest-scoring areas to improve execution.

52-60: Sustain your practices and compare perspectives across the team.

These ranges are discussion guides, not validated benchmarks. Differences between leaders' answers may be as useful as the total score.

Our lowest-scoring area: _____

One action in the next 30 days: _____

Who will own it, and by when? _____

TURN YOUR ASSESSMENT INTO A FOCUSED CONVERSATION.

Book a complimentary 20-minute introductory call with Pablo J. Pérez to discuss your results and explore how Ingenium can support your team.

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