



Tool 4-1. Strategic Planning Analysis Questionnaire

Leonard D. Goodstein

Based on Chapter 4, “Strategic Planning: A Leadership Imperative,” in *The ASTD Leadership Handbook*, edited by Elaine Biech, © 2010 ASTD

Purpose: This questionnaire is intended to help you understand the role of strategic planning in your organization.

To be maximally useful, candor on the part of the person completing this questionnaire is essential. The questionnaire consists of 33 statements that are rated on a five-point scale indicating your degree of agreement with that statement. Rate each statement.

The organization under scrutiny is _____

Rate each of the following statements on a five-point scale, using the following scale:

- A rating of 5 means that you strongly agree with this statement.
- A rating of 4 means that you somewhat agree with this statement.
- A rating of 3 means that you neither agree nor disagree with this statement.
- A rating of 2 means that you somewhat disagree with this statement.
- A rating of 1 means that you strongly disagree with this statement.

		RATING
1.	This organization has a viable strategic plan, one that guides most of its important decisions.	
2.	The organization’s strategic plan is widely understood by most of the organization’s employees.	
3.	The organization has a clearly articulated set of values that guide the organization’s operations.	
4.	The choices the organization makes are largely based on its strategic plan.	
5.	The organization’s strategic plan is a living document that changes to reflect changes in the environment.	
6.	The organization’s strategic plan clearly spells out its desired future state.	
7.	The organization’s strategic plan is woven into its cultural fabric.	
8.	Managers in the organization are evaluated primarily on their execution of their portion of the strategic plan.	
9.	The organization allocates resources primarily on the basis the strategic plan.	
10.	Members of the organization are free to challenge leaders who fail to live up to the organization’s values and code of conduct.	

11.	The organization truly “owns” its strategic plan.	
12.	The organization’s top leadership was intimately involved in the creation of the strategic plan.	
13.	The overwhelming majority of employees buy into the organization’s strategic plan.	
14.	The organization’s strategic planning process is a crucial leadership function.	
15.	The organization routinely and continually scans its environment.	
16.	The organization typically responds promptly to threats and challenges.	
17.	The organization knows who its competitors are and has a defensive plan.	
18.	Organization leadership is clear about what kind of culture it desires.	
19.	The organization is clear about what business(es) it plans to be in.	
20.	The organization is clear about who its customers are or will be.	
21.	The organization is clear about what customer needs it intends to meet.	
22.	The organization is clear about what societal needs it intends to meet.	
23.	There is clarity about what specific businesses the organization intends to be in.	
24.	There is clarity among the organization’s leadership about how well the organization currently is performing.	
25.	There are milestones in place to keep track of how well the organization is doing in implementing its strategic plan.	
26.	The goals established by the strategic plan are attainable over time.	
27.	Each major component of the organization has its own strategic plan based on the overall strategic plan.	
28.	The organization’s leaders clearly demonstrate strategic thinking.	
29.	Elements of the strategic plan show clear sign of creativity.	
30.	The organization’s leaders are capable of making tough decisions and do.	
31.	In planning, the organization’s leaders typically challenge assumptions.	
32.	The leaders of the organization are not sentimental about any of the various lines of business in which the organization is involved.	
33.	Organizational leaders keep stressing the importance of executing the strategic plan.	
	TOTAL SCORE	

APPLICATION

Strategic Planning: A Leadership Imperative

You may use this questionnaire in a variety of ways. You can use it as an interview outline with one or more senior managers of an organization to assess the degree to which a strategic plan has been implemented. Or you may ask them to complete the questionnaire, then score and summarize the data, to be used later in a feedback session. Another potential use is to survey the entire organization with the questionnaire to determine where understanding of the plan and its implementation needs to be enhanced. In such a case, the work unit of the respondent would need to be added to the form.

Interpretation

Scores	Meaning
33-51	There is little evidence that strategic planning has occurred or been implemented. Leadership needs to begin planning from scratch.
52-94	The evidence for strategic planning is spotty and the plan has not taken root. The reasons for this weak adoption of the plan require leadership exploration.
95-137	There is clear evidence that the plan is understood and implemented. There are, however, gaps in understanding or implementation that need to be identified and addressed by the organizational leadership.
138-165	There is widespread understanding of the plan, and it is being implemented. Leadership needs to celebrate its accomplishments.