The FOR Organizational Assessment

This tool was designed to help you close the gap between what you want to be known for and what you are known for.

To begin this assessment, start by asking your key internal stakeholders to answer the questions below. The combination of their scores will help you determine the gaps in your organization. The FOR Company is here to help you close the gap between what you want to be known for and what you are known for.

WHO SHOULD COMPLETE THIS SURVEY

The survey is designed to be taken by key team members who are part of your organization.Ideally, those who complete the survey will first read the book to understand the ideas that are the basis for the questionnaire. There is value to be gained from all levels in the organization:

1. Leaders – they are responsible for sharing vision/purpose and for leading other team members

2. Team Members – they experience being part of the organizational culture as well as interacting with customers and the community

3. Other Internal Stakeholders – this includes board members, donors, volunteers, and others

who are a part of fulfilling the purpose of the organization. Some of the questions on the survey require internal stakeholders (leaders and team members) to give their perceptions of the opinions of customers and community members. They should answer drawing on what they know from customer interaction and all of their experiences. Their responses to these questions are still valuable but must be evaluated with the understanding that they are putting themselves into the mind of the customer and making some assumptions.

Ideally, the organization should also obtain feedback on these issues from actual customers and community members.

Apply the Survey to the Context

In this tool, the word "customer" is used for simplicity (rather than using multiple words/options each time the concept is mentioned). For businesses this may refer to consumers orbusiness-to-business customers. In other cases, the term may be best interpreted as"constituents," "supporters," "members," "donors," etc. When "customer" is used, it refers tothose your organization serves – by providing products or services. In this tool "organization" is also used for simplicity and clarity. For many of you this is best interpreted as "company" or "business." For some it may be "church," or "association." In this tool the designation "team member" is likewise used to make it simple. In your situation, these might be "employees," or "volunteers." When "team member" is used, it refers to those who work together as a team to fulfill the vision of your organization. The concept of "sales" likewise may refer also to acquiring new members, patients, donors, etc.

INSTRUCTIONS FOR INVITING TEAM MEMBERS TO COMPLETE THE SURVEY

It is critically important to create a "safe context" for team members to complete the survey. Only honest and candid responses will be of value. Leadership must provide the safety of anonymity as much as possible and share that the purpose is to help us close the gap between what we say we want to be known for and what we are actually known for.

Core FOR Survey

Complete each question using the 5-point scale provided. The scoring instructions will be at the end of the survey.

FOR

FOR The Customer

OUR SYSTEMS AND PRACTICES

1. Is the focus of our marketing and social media on our products or on our customers?

ON OUR PRODUCTS				ON OUR CUSTOMERS
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- Are we narcissistic (we love ourselves) or are we fans of customers? Specifically, how is this manifested?
- What specific content in our vision, mission, and core values can help us focus on becoming fans of our customers?
- How can we have a healthy balance of sharing our strengths and capabilities (feeling good about/promoting us with being fans of our customers?
- How do we as leaders communicate and motivate our team to be fans of our customers?
- What changes are needed – even in the pillars of our organization (how we view ourselves)?
- Who is responsible for this area?

2. Is our approach to acquiring new customers focused only on making a sale or do we have intentional systems to help us demonstrate that we care about more than the transaction? Are our sales efforts and interaction...

MOSTLY TRANSACTIONAL				MOSTLY RELATIONAL
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- How can we have a healthy balance in our social media strategy between promoting the company vs. engaging the customer?

3. As we provide service to our customers, do we focus mostly on selling them more (atransaction) or do we also have intentional systems to help us demonstrate we are FOR them (a relationship)? Is our service to customers...

MOSTLY TRANSACTIONAL				MOSTLY RELATIONAL
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- What specific business rules (systematized actions) are in place to clearly communicate "we are FOR you" and "we want a relationship with you?"
- Where are the opportunities for us to create these systems?
- At what point on the customer journey can we/should we communicate relationally with the customer?
- How are we leveraging Before, During and After moments of a purchase?

FOR ↑

4. When we analyze messages from our most recent ads/publications/posts (at least our last 10), does this show we're only FOR ourselves (how great we are) or in a balanced way also FOR our customers (how great they are)? Does our messaging show that we are...

FOR OURSELVES				FOR OUR CUSTOMERS
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- Are we balancing talking about ourselves and our capabilities (how great we are) with talking about customers (how great they are)?
- What "filters" are in place (can be) to help us test our messaging to make sure to reduce narcissism and show we are FOR customers and prospects?
- For example, of the last 10 Facebook or Instagram posts, how many are about the organization and how many are about the customer/community?

INTERACTION WITH CUSTOMERS

1. How consistent and effective are our strategies and systems in helping us connect an interact with customers to build relationships and intentionally show that we are FOR them?

NOT AT ALL EFFECTIVE				VERY EFFECTIVE
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- Are we balancing talking about ourselves and our capabilities (how great we are) with talking about customers (how great they are)?
- What "filters" are in place (can be) to help us test our messaging to make sure to reduce narcissism and show we are FOR customers and prospects?
- For example, of the last 10 Facebook or Instagram posts, how many are about the organization and how many are about the customer/community?

2. How intentional and effective are we in providing opportunities for and encouraging customers to give us feedback?

NOT AT ALL EFFECTIVE				VERY EFFECTIVE
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- Do we clearly convey to customers that we want their input and feedback?
- Do customers know how to communicate their opinions and perspectives to us?
- Specifically, how are we doing this? (Social media, conversations, etc.)
- Who is responsible for this area? (Do we have capable leadership and team members here?)
- What improvements do we need to make?

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3. How intentional and effective are we at systematically listening to our customer's feedback and perspective, to build relationships and show we are FOR them?

NOT AT ALL EFFECTIVE				VERY EFFECTIVE
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- What systems do we have in place to process and understand the feedback customers provide?
- What business rules or systems are in place that ensure we are regularly and carefully listening to them?
- Who is responsible specifically to make sure we listen?
- What improvements do we need?

4. How intentional and effective are we at creating sustainable and meaningful individual interactions with our customers?

NOT AT ALL EFFECTIVE				VERY EFFECTIVE
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- Do we follow our customers where they are active on social media?
- Do we have systems to ensure that we like our customer's posts?
- Do we follow and like as much as we post? (What goals do we need to set here?)
- Are we making any efforts to know customers individually on their terms (their social media, where they are themselves)?
- Who is responsible specifically to make sure we are doing this?
- What improvements do we need?

HOW CUSTOMERS SEE US

1. Most of the time, when our customers talk about our organization and our service how do they describe us? Are they...

VERY NEGATIVE				VERY POSITIVE
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- Do we know what they're saying about us? How do we know?
- Where are they communicating about us?
- What specifically are they saying about us, and why?

FOR →

2. Most of the time, when our customers talk about us to potential customers how likely are they to recommend and encourage others do business with us? Are they...

VERY UNLIKELY				VERY LIKELY
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- How do we know what is happening here – do we understand when we get referrals?
- Have we created a "sales force for free" by being FOR our customers?
- How can we grow our positive word-of-mouth ("sales force for free")?
- Who is responsible specifically to make sure we are doing this?
- What improvements do we need?

3. Most of the time, when our customers describe our organization, our reputation and our brand (identity) how closely does what they say match what we want to be known FOR?

NOT AT ALL				COMPLETELY
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- What are the brand associations (words, descriptions, ideas) customers use to describe us?
- Have we clearly defined what we want to be known for and shared it with every stakeholder?
- Are we intentionally and effectively shaping customer perceptions through our messaging and customer relationships? If so, how? If not, why not?
- How can we ensure that there is alignment between these two critical questions?
- Who is responsible specifically to make sure we get this right?
- What improvements do we need?

4. Most of the time, when they talk about what really matters to our organization how much would our customers say we care about them? Would they say...

NOT AT ALL				COMPLETELY
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- What are we specifically doing (if anything) to communicate that we care about customers?
- How do we respond when it's clear a customer does not feel cared for?

FOR The Team

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1. Is our purpose clear and often repeated so that every team member understands what we as an organization want to be known FOR (by our customers and our community)?

VERY UNCLEAR				VERY CLEAR
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- Have we clearly defined what we want to be known FOR?
- Can every team member recite clearly what we want to be known FOR?
- Is our purpose/vision being modeled by the organizations' leaders?
- How is our purpose communicated and owned by our team?
- Do we help team members be part of something larger then themselves?
- Does what we see in our team space reinforce our purpose?
- Do we reinforce/celebrate team members' actions that are consistent with our purpose?
- Who is responsible for making sure this happens?

2. How intentional and effective are we at building a healthy organizational culture where team members feel the organization is FOR them?

NOT AT ALL EFFECTIVE				VERY EFFECTIVE
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- What intentional cultural values have we identified which reinforce that we are FOR our team (and individual team members)?
- How do we validate that team members whole-heartedly believe the organization is FOR them?
- If team members do not feel cared for, how do they convey this safely to leadership?
- What systems have we built to ensure healthy people and a healthy culture that is FOR team members?
- Who is responsible specifically to make sure we are doing this?
- What improvements do we need?

3. Is our organizational leadership characterized more by belief in team members and their ability to fulfill the organizational purpose; or by giving them specific mandates to follow?

MANDATES				BELIEF
1	2	3	4	5
☐	☐	☐	☐	☐

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Follow-up Strategic Questions

- Why is our leadership culture as it is? (What has caused this?)
- Is this an area of growth for our organizational leaders?
- Are we hiring team members who fit our purpose and who are FOR customers?
- How can we help our team members become more confident and competent so that belief in them can continue to grow?
- Who is responsible specifically to grow our team and a healthy organizational culture?
- What improvements do we need?

4. How intentional and effective are we at listening and responding to our team members; do we value and welcome their ideas and innovations?

NOT AT ALL EFFECTIVE				VERY EFFECTIVE
1	2	3	4	5
☐	☐	☐	☐	☐

Follow-up Strategic Questions

- What opportunities and channels have we created for our team members to give us their feedback and ideas?
- How do we communicate and demonstrate to team members that we value their ideas and contributions?
- Can we give examples of where team members ideas were heard and implemented to make an impact?

Scoring

Score each area individually. For each sections (groups of 4 questions) there are 20 possible points. Use the following instructions to help you apply what you have learned in the book.

SCORE	STATUS	ACTIONS
17-20	Advanced (Higher FOR SCORE)	• Your team is generally following FOR principles, celebrate what your team is doing right. • Identify areas needing improvement – set goals to become expert (5) in all areas. • Review the corresponding section of the book for practical ideas to create more focus and growth in lower-scoring areas. • Shore up systems to ensure that FOR principles are executed consistently.
13-16	Developing (Moderate FOR SCORE)	• Your team is making progress and should be encouraged that you can be a FOR organization. • Begin with areas where scores are lowest – lead your team through the sections of the book that apply to these. • Work together to set goals and create systems to address areas of weakness. • Maintain discipline where scores are higher so as not to lose momentum in these areas. • Be sure to identify a champion who will passionately promote the CORE FOR within your organization.

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SCORE	STATUS	ACTIONS
8 – 12	**Stalled (Lower FOR SCORE)**	• Be honest abut your organization's priorities – you need to change. Look for the ways narcissism infects your processes, systems and interactions. • Review the prologue of the book to understand the reasons to focus on the CORE FOR with the organization's leaders. • Ask your leadership team to make a commitment to the Core FOR – to do the hard work to become a FOR organization. • With this commitment in place, identify the areas of relatively higher scores that can be starting points to move forward. • Look for opportunities to build systems that address the CORE FOR using the corresponding sections of the book to learn practical suggestions. • Learn to celebrate even small wins that show the impact of being FOR others. You must create a belief within your team that you can transform your focus and then your organization.
1-7	**Weak (Negative FOR SCORE)**	• Your organization is upside down and needs to make a 180° turn in some critical areas. Only then can you grow and be FOR the right things (like your customers and community). • You need to decide if this model is for you – will you commit to the CORE FOR? • If your organization wants to live the values presented in the FOR construct, use the instructions for the Stalled group to move forward.