

Culture Assessment Questionnaire

HOW WE THINK:

What are the top three things the leaders/owners of the company VALUE (most important... as proven by actions)?

Why are we in business?

What do we do?

LEADERSHIP:

How clear are the expectations for employees? Explain:

How are people evaluated for performance in the current culture?

How do we hold people accountable? On a scale of 1-10 (1 = not at all, 10 = extreme) how much does the organization hold people accountable?

How does the organization motivate people?

What style of leadership exists today? Circle items that are part of the current culture: Empowerment, control, hands on, hands off, active, passive, introverted, extroverted?

What are the reporting structures and what levels of authority exist with different positions?

STRATEGY:

What are the current business strategies being used to get results today?

What strategies do we believe will be necessary to be successful in the future?

CLIENTS:

What are the philosophies the company believes in pertaining to the clients?

What are personnel structures used to manage client relationships, service, and value delivery?

What is the Producer/Consultant's role in working with clients?

Are clients served with a pool of Account Managers or are clients assigned to Producer teams that stay consistent?

MARKETING (external to prospects and clients):

How does the company communicate with Prospects and Clients?

What social media is being used today? List any social media policies.

What are expectations of any personnel pertaining to marketing?

MARKETING: (Internal to insurance companies):

Who does the marketing in each line of business?

Does the organization do the marketing on the Producer team or is it pooled and/or done with a marketing department?

OPERATIONS:

What is the structure of leadership and management in operations?

How were the process and procedures developed?

How disciplined is the organization to the current processes/procedures?

How receptive will the people be to changing the processes and procedures?

AUTOMATION:

What automation system is currently being used?

What level of usage is the organization experiencing today (1-10, 1=Not utilized at all; 10=Maximizing the system).

What accountability is in place for the use of automation today?

PRODUCERS / SALES:

What is expected of a Producer?

What is the expense management process in place with Producers today?

What style of management is used with sales people in the organization today?

NORMAL BEHAVIORS:

What behaviors, both positive and negative, would be normal in the company today that have not been listed in the above answers?

SUMMARY

What items are the same?

What items are different?

What items will be most difficult to change? Why?

Are any items potential deal killers?

How much do we expect to spend in blending the “cultural” part of the business?

Action Items from this Assessment: