

Decision Support Tool: Transformation Diagnostic

A self-assessment to decide if large-scale transformation is right
for your business at this time

Fill out the template and make judgment calls based on results

Case examples given

Example Diagnostic: Publicly-Traded Global Enterprise

Incremental Improvements Required in Several Areas - Targeted Interventions -

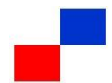


Example Diagnostic: Privately-Held, Post-Series A Tech Firm

Advantages Eroding
- *Urgent Need for a Pivot* -



What would you address first? Second? Third?




Self-Assessment

(Please Be Objective and Brutally Honest)

	<i>On-Track</i>	<i>Eroding</i>	<i>Eroded</i>
Customer Satisfaction	[Blue bar]		
Offering Differentiation	[Blue bar]		
Competitive Position	[Blue bar]		
Disruptive Capabilities	[Blue bar]		
Earnings	[Blue bar]		
Sales Growth	[Blue bar]		
Cost Optimization	[Blue bar]		
Talent Retention	[Blue bar]		
Operations Effectiveness	[Blue bar]		
Social Responsibility	[Blue bar]		
Firm Valuation	[Blue bar]		



Marker for you to copy and place on the spectrum



Spectral Analysis: *Questions to Answer*

1. Do you need to transform your business?
 - If so, what is your vision of the transformed business?
2. Where is your business strongest?
 - How will you leverage those strengths to your advantage?
3. Where is your business in need of intervention?
 - How and when will you start making improvements?
4. What part of your business can remain *status quo* (for now)?
 - What are your priorities?
5. How would your leadership team complete the assessment?
 - Is there consensus?
6. How would you assess your competitors?
 - How will you change your competitive strategy given competitors' weaknesses?
7. How will you align owners and your employees to transformation objectives?
 - Do you anticipate any roadblocks and resistance to change?
8. How will you ensure your transformation is well received by customers?
 - If you change offerings, are there legitimate customer needs to fulfill?
9. What are your immediate next steps?



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