

The Quarterly Strategic Health Check



A quick check for what is working, what needs attention, and what may need to change.

ORGANIZATION OR TEAM		REVIEW PERIOD	DATE
MARK ONE RESPONSE FOR EACH CHECK. Discuss the pattern, then record only the material decisions.			

AREA	#	QUARTERLY CHECK	WORKING	NEEDS ATTENTION	NOT IN PLACE
MISSION	1	Does our Strategic Foundation still reflect who we are and where we are going?			
MISSION	2	Are important decisions consistent with that foundation?			
MONEY	3	Are our 3-5 Strategic Objectives still the right investments?			
MONEY	4	Do our resources and trade-offs match those objectives?			
METRICS	5	Does each objective have a useful measure, current state, and target?			
METRICS	6	Have the Metrics helped us make a decision this quarter?			
MAP	7	Is every active Key Initiative connected to an objective and owned?			
MAP	8	Is the sequence still realistic for the next horizon?			
SHARED CLARITY	9	In everyday conversations, are people naming the same priorities?			
SHARED CLARITY	10	Are leaders making consistent choices when new requests or trade-offs arise?			
STRONGEST AREA 			AREA NEEDING ATTENTION 		

MATERIAL DECISIONS Record only decisions that change the plan, its commitments, or its assumptions.

#	MATERIAL DECISION	AREA	OWNER	BY WHEN
1				
2				
NO MATERIAL DECISIONS ☐ Continue the plan 1-2 MATERIAL DECISIONS ☐ Make focused adjustments 3+ OR ONE FOUNDATIONAL CHANGE ☐ Revisit the full plan				