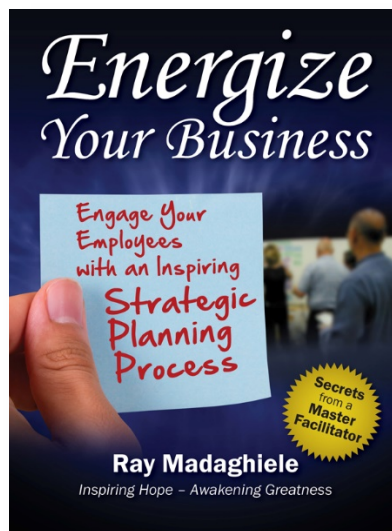


CIRCLE OF SUCCESS ASSESSMENT GUIDE

A Companion to

Energize Your Business:
Engage Your Employees with an Inspiring
Strategic Planning Process



by Ray Madaghiele

Clarify ~ Organize ~ Act ~ Realize™



- Clarify
 - Organize
 - Act
 - Realize
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This guide contains excerpts from *Energize Your Business: Engage Your Employees with an Inspiring Strategic Planning Process* by Ray Madaghiele, published in 2015 by Transformational Learning Center.

Published by
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INTRODUCTION



Here's a simple assessment tool for you and your employees to see the "flat spots" in your organization and where you are maximizing your potential. It is an organizational medicine wheel that I call the Circle of Success

I have been using this simple, yet revealing strategic planning tool for many years with the organizations I serve. It provides leaders with a quick visual assessment of many of the ingredients that breed success and profitability in organizations. It's also a great, engaging teambuilding exercise.

In a nutshell, when you can maximize each of these sectors, you will be maximizing your organization's potential.

In general:

- when each of the "Planning" sectors is well-defined and clear to all your employees, everyone will be on the same page and moving in the same direction;
- when "Staffing" your organization, you hire the right people, assign them to the right jobs, and know that they have a clear understanding about their roles and responsibilities;
- when "Teambuilding," your employees have been given the right training, coaching, and mentoring so that they will make the right decisions; and
- when you have established the right "Processes"—measurements, systems, procedures, accountabilities, etc.—you will have primed your organization and employees to succeed in serving your customers.

I invite you to give it a try. I think you will like its simplicity and the visual impact it will have on you and your leaders. It is a most effective way to see where you need to focus energy and resources (the flat spots).

Let's see how well does your organization's wheel roll?

Much success and fulfillment,

Ray Madaghiele, Chief Inspiration Officer
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FACILITATING THE CIRCLE OF SUCCESS ASSESSMENT

The Circle of Success is a simple assessment tool that will enable you and your employees to see at a glance the "flat spots" in your organization as well as the areas in which you are maximizing your potential. See Figure 17. I consider it an organizational medicine wheel.

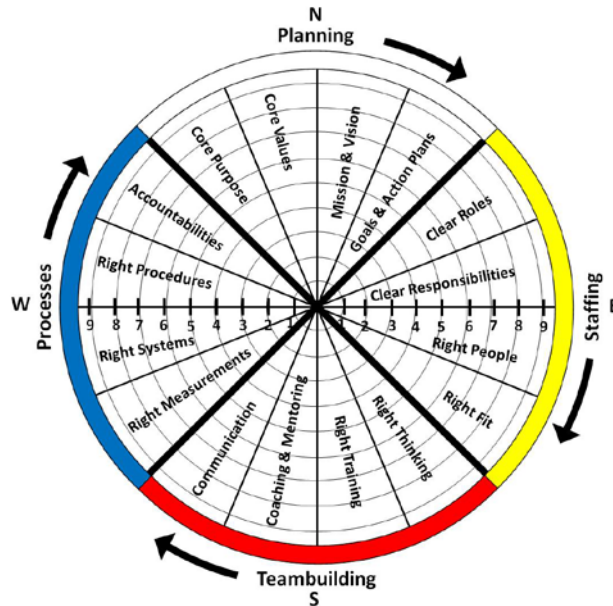


Figure 17: Circle of Success Assessment Tool (revisited)

I have been using this simple, yet revealing strategic planning tool for many years when I work with the organizations I serve. It provides leaders, like you, with a quick visual assessment of many of the ingredients that generate success and profitability in organizations. It's also a remarkable, engaging teambuilding exercise. Here's how it works:

1. You'll notice that there are four quadrants in this wheel: (1) Planning; (2) Staffing; (3) Teambuilding; (4) Processes. Each quadrant has 4-sectors, or focus areas, (in which to invest energy and resources)—a total of 16 focus areas to assess.
2. Superimposed on the Circle of Success is a horizontal scale identified by 10 concentric circles with zero ("0") in the center and "10" on the outer circumference.
3. Here's how it works: First, decide what you want to assess—the organization as a whole or any individual department you choose. Invite your leaders to do the same to see how your collective points-of-view align or differ.
4. Now it's time to score how you think/feel your organization is doing. The scoring works like this: Zero ("0") is the lowest score and indicates that your organization or department is performing poorly in that particular area. Ten ("10") means your organization or department is functioning in an exemplary manner in that particular area and couldn't do better if you tried.

5. Score each sector separately by asking yourself, “At this point in time, how well has our organization (or department) defined, communicated and performed in this particular area?” (As a first step, you can score each sector on the matrix shown on the following page if you desire.) For each sector, put an “X” on the scale in the center of the wedge you are scoring.
6. When you have scored all 16 sectors, connect the dots. (See the example in Figure 18.)

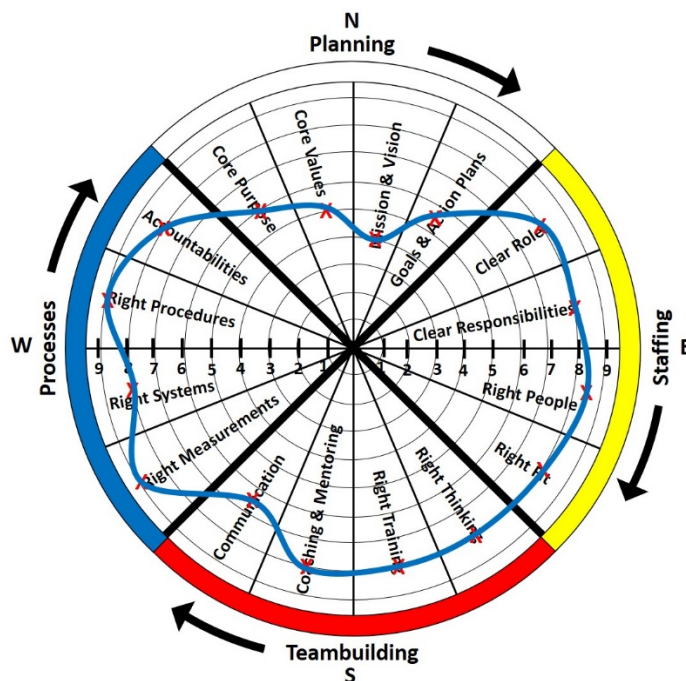


Figure 18: Example of completed Circle of Success Assessment

7. Now look at the “wheel” of connected dots you have just created. Would the “wheel” roll? Do you happen to see any interesting shapes? (Similar to looking for shapes in cloud formations, some of my perceptive clients have enjoyed identifying shapes resembling birds, bells, and other outrageous images. Have fun with it!)
8. Compare your wheel with others who have joined you in doing this exercise. Discuss the similarities and differences.
9. Now identify low, “flat spots” on the wheel that need attention. These are notable areas in which to set goals and invest resources, maximizing your potential by bringing those areas back into alignment and balance.
10. Use this tool at least quarterly to see how well your organization (or department) is progressing. There will always be new sectors of your organization that need attention because organizations are living, breathing organisms constantly ebbing, flowing, and morphing.

It's your turn now. Give it a try. I think you'll like its simplicity and effectiveness.

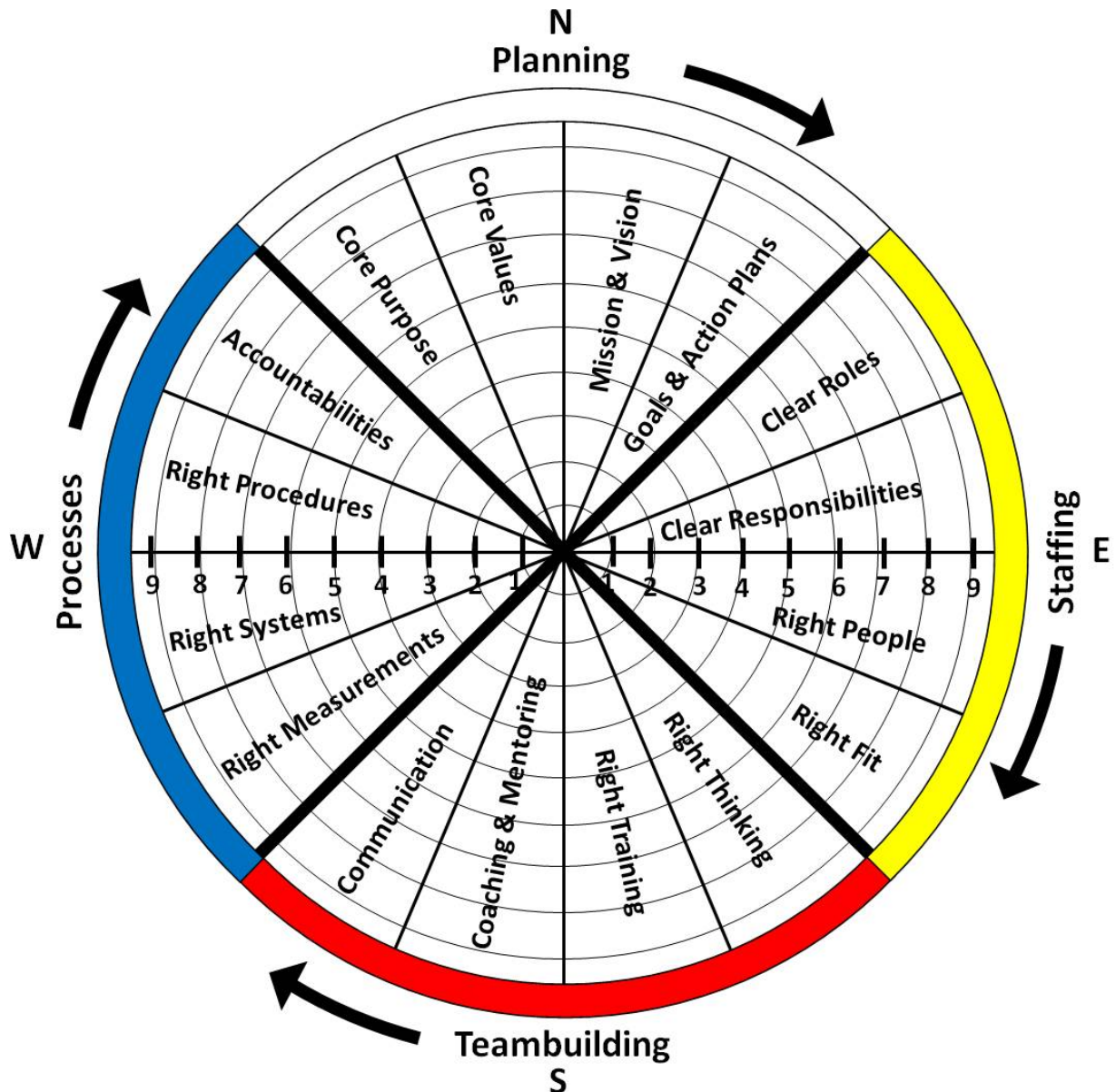
CIRCLE OF SUCCESS MATRIX ASSESSMENT

Instructions: Rate your present level of success in each of the key sectors identified below that contributes to the prosperity of your organization. A ten (10) indicates that you are effective and efficient in that area and couldn't be more successful if you tried. A zero (0) indicates that your organization is performing extremely poorly in that area and couldn't do worse if you tried.

Key Sectors	Rating (0 to 10)
PLANNING	
Core Purpose: You have a written core purpose that identifies why your organization exists—your employees understand it and factor it into the heart of their decisions and actions.	
Core Values: You have a set of written core values that guide employees' behaviors and how they treat each other and your customers. They are promoted and enforced consistently.	
Mission & Vision: You have a written mission statement that clearly defines your business, and a vivid vision of your desired future state that provides your employees clear direction.	
Goals & Action Plans: You have identified in writing the goals, objectives, strategies, tactics, schedules, and resources required to achieve your purpose, mission, vision, and values.	
STAFFING	
Clear Roles: Your employees understand their unique roles in the organization—their piece of the puzzle—and how their roles are important to the success of the organization.	
Clear Responsibilities: Your employees understand their job duties and responsibilities and their bosses' desires and expectations of them so they can be successful.	
Right People: You have hired the right people who possess the necessary attitude, skills, and knowledge for the organization to be successful and for them to be fulfilled.	
Right Fit: You have placed your employees in the right jobs that match their talents, skills, abilities, and passions to maximize their potential and optimize their contribution.	
TEAM BUILDING	
Right Thinking: Your employees make good, confident decisions—with minimum supervision—that are in the best interest of the organization, customers, and their team.	
Right Training: You provide employees with the necessary training for them to develop the right attitude, skills, and knowledge to perform their jobs effectively and efficiently.	
Coaching & Mentoring: You provide employees with coaching and mentoring developmental opportunities to help them reach their goals and achieve success.	
Communication: Communication flows effectively and efficiently throughout the organization such that employees are kept informed and given ample opportunity for feedback.	
PROCESSES	
Right Measurements: Progress is measured so that it is always clear how well things are going toward fulfilling the values, mission, vision, goals, objectives, strategies, and tactics.	
Right Systems: Required systems (high-tech & low-tech) are established to make the goals, objectives, strategies, and tactics operational and deliverable—effectively and efficiently.	
Right Procedures: Procedures are identified in writing for effectively and efficiently accomplishing the different processes in the different departments.	
Accountabilities: Employees understand their commitments and responsibilities and are encouraged to be self-accountable—supervision holds them accountable if necessary.	

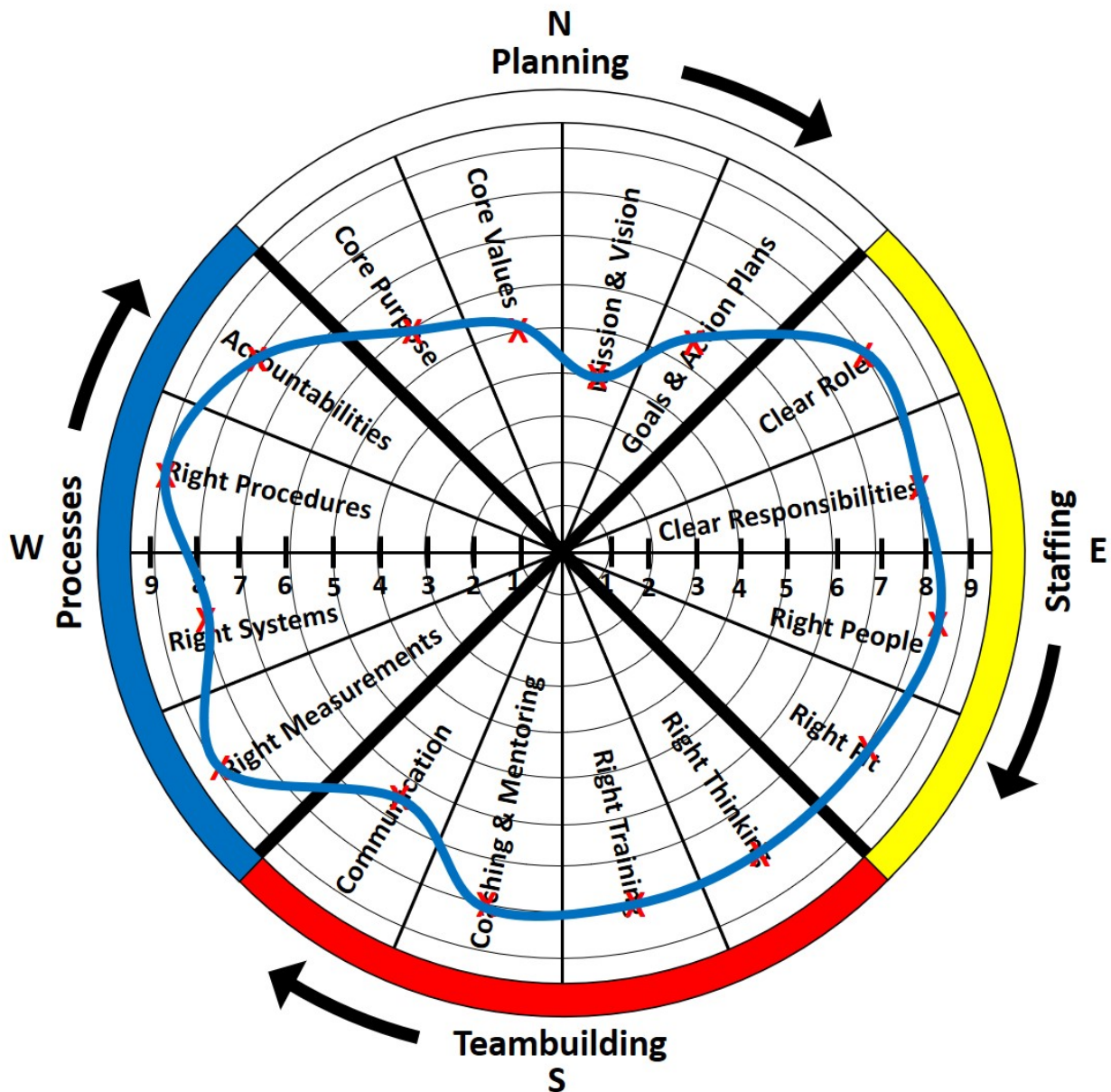
CIRCLE OF SUCCESS

Optimizing Alignment and Performance



CIRCLE OF SUCCESS EXAMPLE

Optimizing Alignment and Performance



Ray Madaghiele's History, Success and Capabilities

Strategic Planning • Meeting Facilitation • Training • Coaching



Ray Madaghiele is a master facilitator, trainer, coach and speaker who has 30 years of experience helping hundreds of organizations improve their performance and solve big problems.

Ray guides organizations to make quantum leaps forward and quickly maximize their return on investment (ROI) in leadership and organizational development.

Ray has vast experience working with a diverse array of companies, non-profit organizations, and Native American communities and their enterprises.

Outcomes

- **Clarify** your unique organizational culture and strategic direction
- **Organize** to achieve your vision, mission and goals
- **Act** with everyone on the same page and moving in the same direction
- **Realize** results that exceed your desires and expectations

Client Focus

Ray works with enlightened leaders who want to create an energized, fulfilling environment in which individuals and teams grow and thrive.

Resource

Ray is the author of ***Energize Your Business: Engage Your Employees with an Inspiring Strategic Planning Process*** in which he shares insights into building a more collaborative, high-performing organizational culture and a more profitable business.

Services

- **Strategic Planning**
Gain enthusiastic support for your organization's Strategic Plan through a well-engineered, engaging process.
- **Meeting Facilitation**
Assure you have an inspiring, engaging and productive meeting that accomplishes your desired objectives.
- **Leadership Training**
Create an empowering, customer-driven culture in which leaders and employees grow and thrive.
- **Coaching for Leaders**
Accelerate your leadership team's professional success and fulfillment.



Contact Ray to speak at your next event
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Business Services

Strategic Planning • Meeting Facilitation • Training • Coaching

Create a successful, energized and fulfilling organization



Results

- Increase profitability
- Improve productivity
- Generate greater employee engagement, satisfaction and retention
- Enhance work/life balance

Services

- **Strategic planning**
 - Strategic planning retreats
 - Visioning focus groups
 - Strategic project planning
- **Meeting facilitation**
 - Leadership retreats
 - Employee engagement
 - Teambuilding
 - Group problem-solving
- **Leadership Training**
 - How to Facilitate Strategic Planning
 - Build High-Performing Teams
 - Effective Communication
 - Relationship building
 - Creative problem-solving
 - Goal-setting
 - Customer service
 - Project management
 - Time management
 - Create Work/Life Balance
- **Coaching for Leaders**

Clients

- Established and start-up companies
- Non-profit organizations
- Native American communities and their enterprises

Outcomes

- **Clarify** your unique organizational culture and strategic direction
- **Organize** to achieve your vision, mission and goals
- **Act** with everyone on the same page and moving in the same direction
- **Realize** results that exceed your desires and expectations



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