



General Assessment Guideline

Assessment Day 1

Opening conference w/client

Report Card - Identify the Key Operations and concerns of the company.

Review the results of the *Portaculture*™ Survey that was taken prior to arrival. Determine what corrective measures can be taken and what measure will require long term attention.

Understand Purpose - Why do we do what we do? (Clarify. This step is critical.)

Understanding Mission – What we do? (Clarified)

Clarify Vision – Where we are headed? (Understanding)

Understanding Core Values- Who we are, what we believe - the heart of the organization.

Introduce the Passion, Trust and Character Orb, the significance of a healthy culture.

Discuss ways this kind of culture would give the client an advantage, and ideas to develop leaders who model the behavior that produces.

Begin development of a Business Plan using the Portal - What do we plan to accomplish, ensure the purpose and vision are connected to core values.

CEO - Strength Finder 2.0

Assessment Day 2

Discussion with key employees (4-8 interviews on-site)

Assess organizational structure

Clarify Vision - Where are we headed?

Compile written report with relevant observation for improvement.

Understand the tactical functions of the organization in view of the strategic decisions being made. (Marketing, Sales, Project Management, Sub-contracting, etc.)

Field survey, evaluate jobs in progress.

Assessment Day 3

Provide PORTAL of tools, best practices and training modules for sustainability and future advancement.

Report presentation - Point to possible solutions, if desired.

Personality profiles and how to use them effectively.

Affirm the vision, Mission, and core values.

Review Client assessment with owner.

Conclude and finalize report, and furnish proposal to continue to grow the company with supportive coaching.

Discuss effective goal setting as it relates to projects.

Meeting with key employees (2 hours).

Evaluation of the performance of *Portacle*™

Request for recommendation, and feedback.

Cost: 5500.00 on Completion.

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