

▶ PRE-PLANNING SURVEY

Instructions:

- Complete this form to prepare for the Pre-Planning Survey at <https://coach.win/survey>
- The insights from the Pre-Planning Survey will help guide the leadership team in creating the company's strategies and priorities in the next strategic planning meeting.
- The final report will contain your exact feedback without attribution. As you provide your insights, please avoid including any personal identifiers or specific references that could inadvertently reveal your identity. This step will ensure your privacy is maintained while enabling us to gather honest and impactful feedback.
- The survey features a series of open-ended questions crafted to give you the freedom to share your insights and experiences.



WINS

WINS: WHAT, IN YOUR OPINION, WERE THE MOST SIGNIFICANT ACHIEVEMENTS OF YOUR ORGANIZATION IN THE PAST 90 DAYS, AND WHY DO YOU CONSIDER THEM NOTEWORTHY? (EXAMPLE: "HIRING, ONBOARDING, AND TRAINING FIVE NEW SALES REPRESENTATIVES.")

START

START: BASED ON THE COMPANY'S PERFORMANCE IN THE PAST 90 DAYS, WHAT IS ONE THING YOU BELIEVE WE SHOULD START DOING TO IMPROVE? PLEASE BE SPECIFIC. (EXAMPLE: "MOVE ALL INTERNAL COMMUNICATION FROM EMAIL TO TEAMS.")

STOP

STOP: BASED ON THE COMPANY'S PERFORMANCE IN THE PAST 90 DAYS, WHAT IS ONE THING YOU BELIEVE WE SHOULD STOP DOING TO IMPROVE? PLEASE BE SPECIFIC. (EXAMPLE: "STOP HAVING MEETINGS WITHOUT CLEAR OBJECTIVES AND AGENDA.")

CULTURE

CULTURE: IN REFLECTING ON THE PAST 90 DAYS, HOW WOULD YOU DESCRIBE THE ORGANIZATION'S CULTURE, PARTICULARLY IN TERMS OF APPRECIATION, INDIVIDUAL GROWTH, DEVELOPMENT, TRUST, AND RESPECT AMONG COLLEAGUES, AND WHAT ACTIONS COULD BE TAKEN TO FOSTER A MORE POSITIVE CULTURE? (EXAMPLE: "OVERALL THE CULTURE IS GOOD, BUT LEADERSHIP DOESN'T CELEBRATE OUR WINS ENOUGH.")

COMMUNICATION

COMMUNICATION: IDENTIFY ONE AREA WHERE YOU BELIEVE COMMUNICATION COULD HAVE BEEN BETTER IN THE PAST 90 DAYS, AND SUGGEST A SPECIFIC STEP TO IMPROVE IT. (EXAMPLE: "A RECAP OF ALL MAJOR MEETINGS SHOULD BE DISTRIBUTED TO RELEVANT PARTIES ON TEAMS.")

FOCUS

FOCUS: BASED ON YOUR EXPERIENCE, WHAT SHOULD BE THE ORGANIZATION'S PRIMARY FOCUS IN THE NEXT 90 DAYS? BE SPECIFIC WITH YOUR RECOMMENDATION. (EXAMPLE: "DEVELOPMENT OF A CONSISTENT TRAINING AND ONBOARDING PROGRAM FOR NEW TEAM MEMBERS.")

ALL-STARS

ALL-STARS: WHO WOULD YOU CONSIDER THE ALL-STAR TEAM MEMBERS IN THE PAST 90 DAYS, AND WHAT SPECIFIC ACTIONS OR BEHAVIORS MADE THEM STAND OUT? REFERENCE APPLICABLE CORE VALUES, WHERE APPROPRIATE. (EXAMPLE: "MARY SAVED THE DAY BY STAYING LATE TO COMPLETE INVENTORY. #HIGHMOTOR.")
