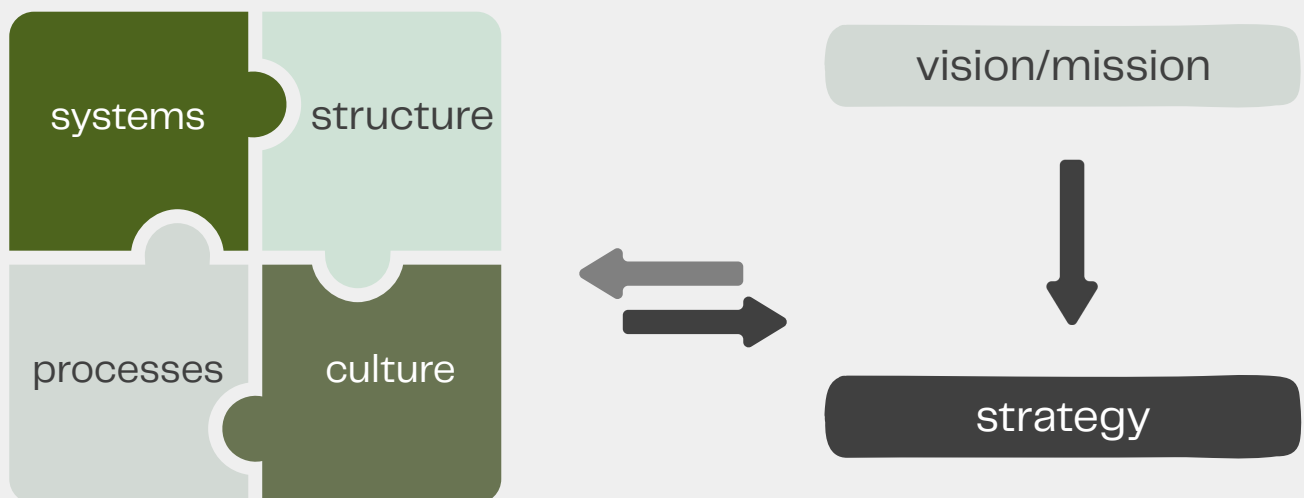




CULTURE ASSESSMENT WORKBOOK

A guide to understanding your culture with steps that guide you on creating a plan to change it.



1 What Business Culture Is and Isn't

Business culture is a combination of artifacts, values, and beliefs that guide employees' behavior.

It is not your values posted in the breakroom. It's how people behave when no one's watching. Culture shows up in who gets promoted, how feedback is given, and what leaders tolerate or reinforce.

Myth 1: Business culture cannot be changed

- **Fact:** It can change and morph for many reasons. Examples include new leaders joining the team, a shift in the company mission, and things like a crisis.

Myth 2: Business culture is just a vibe

- **Fact:** Nope, it affects retention, customer experience, and your bottom line.

Myth 3: Business culture is too fluffy to measure

- **Fact:** Not true, you can measure its influence through key metrics.

Signs Your Culture Needs Attention

How do you know that your culture needs attention? Often, culture is neglected until it becomes a big problem, yet there are often small signs that can be easily overlooked.

- ▶ High turnover in one department
- ▶ Customer complaints about service tone or empathy
- ▶ Leadership avoids tough conversations
- ▶ Employees aren't participating in engagement initiatives
- ▶ Values aren't reflected in promotions or rewards



What signs do you notice in your company that indicate your culture isn't exactly right? Write them here:

3

Culture Mapping Exercise

Use this space to capture where your organization is today. Then identify where you want your company to be. This is your ideal version, don't worry about whether it's possible yet.

Be honest with yourself about where the company is now. If you're not sure and people will be honest with you, ask around. If you aren't sure your people will be honest with you, you're the business owner/CEO/senior leader after all, figure out who they will be honest with and enlist their help.

	Current State	Ideal State
How is your company's mission shared with staff?		
What are the current company values and team norms?		
What behaviors do you reward?		
Note: You can also review exit and stay interviews, employee engagement and pulse surveys, skip-level meeting notes, and variable compensation plans.		

Review your current state against your ideal state.

Where lies the biggest gap between the two?

Are the gaps leader, team, or department specific?

→ What is the root cause of the gaps?

Culture follows structure. If your systems and behaviors aren't aligned with your ideals, your culture will drift.

Develop high-level plans for changes that you want to make to company incentive plans, policies, and procedures.

Write down a few ideas here. And remember, you can't change culture overnight, so while you may have seven plans, start with two or three.

EXAMPLES

1. Let's say that fostering collaboration is a priority with your new culture, and you noticed that current incentive programs are too heavily focused on individual incentives and not enough on team incentives, leading to competition for individual success. Your high-level change may be reworking variable compensation plans to incentivize team/department success.
2. Let's say company innovation and continuous learning are a gap in your culture plan. And you identify that teams are pushed to meet lofty deadlines and goals, which leaves little time or energy for creativity, brainstorming, learning, and trying new things. A high-level change may include adding in 4-hours of paid continued education credit hours per quarter and reimbursing up to \$500 per year for continued education. You may also require that project managers add in 1-2 "buffer" days per project step to allow time in the development process for brainstorming and creativity.

Ideas:

6 What Gets Measured, Gets Managed

How can you measure your culture, and what business data is important that can be measured?

The first objective here is to figure out what metrics can be tracked that reflect your company's goals **and** could be affected (positively or negatively) by culture and the projects you outlined on the previous page.

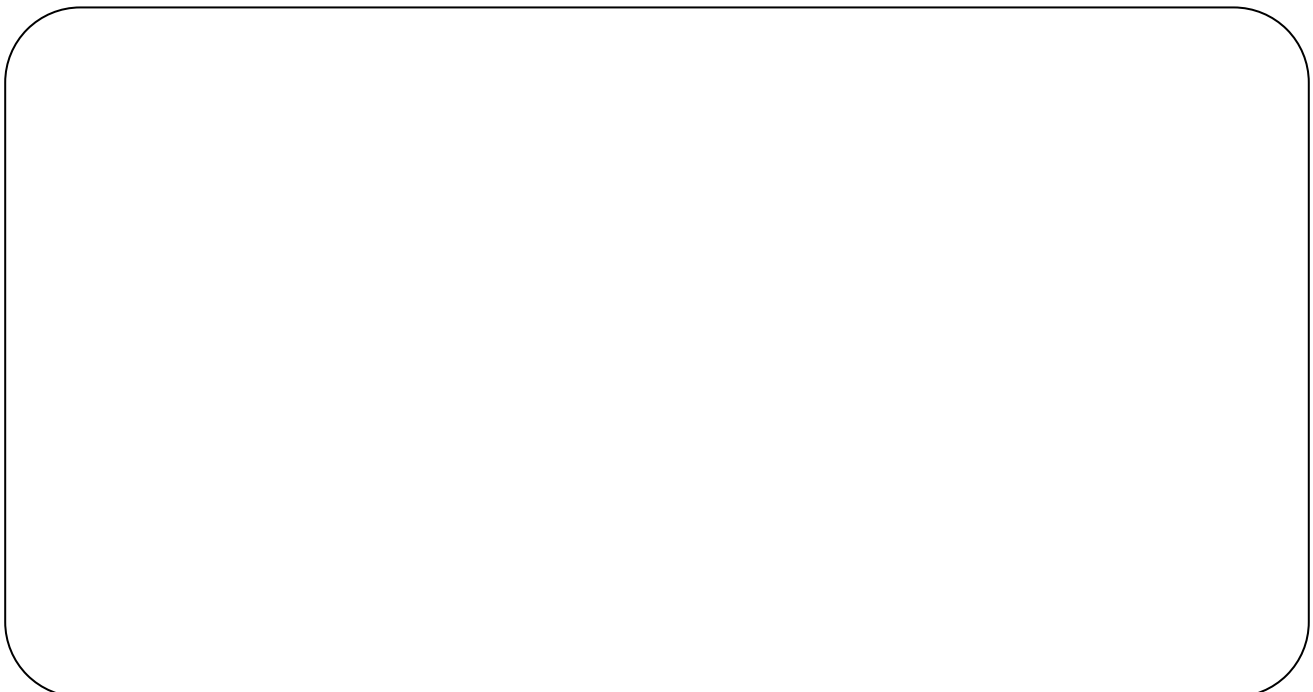
Start here and select 2–3 key metrics. For example:

- Customer retention / NPS
- Employee retention / eNPS
- Time-to-market / innovation index

For each metric, list the influencing factors:

- **Example for employee retention:** Leadership, compensation, training, flexibility, culture.

Write it here:



The next step is to create reporting methods that align the metrics and predetermined factors that affect those metrics.

Using the employee retention example from the previous page:

- Exit interviews should allow departing staff to select the top two or three drivers that affected their reason to leave, with the options being leadership, compensation, training, flexibility, and culture.
- Stay interviews can also ask for the top two or three reasons staff choose to stay with the employer, using those same pre-determined factors.

How do your reporting metrics need to adjust?

Then decide and develop ownership.

- Who is responsible for reporting on these metrics?
- How often will the metrics be assessed?
- When will the metrics be discussed?

Document here:

Metric: _____
 Owner: _____
 Cadence: _____
 Review Method: _____

Metric: _____
 Owner: _____
 Cadence: _____
 Review Method: _____

Metric: _____
 Owner: _____
 Cadence: _____
 Review Method: _____

Metric: _____
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The last step in this workbook is to make a plan to phase the rollout of your new/changed programs.

- Built a project plan using the blank page following this, or in a project management software of your choice. The goal is to roll out the changes in a manner where they are build upon each other.
- Manage the change through effective change management tactics.

Consider this abbreviated approach to culture change.

- Assign dates and dependencies.
- Start with quick wins.
- Communicate clearly and often.
- Train managers to model the new behaviors.
- Use feedback loops to adjust.

Sample/Basic Gantt Chart

Task	Owner	Month 1	Month 2	Month 3	Month 4
		01 Aug 2025	01 Sep 2025	01 Oct 2025	01 Nov 2025
Develop Programs with Sr Leaders	CEO				
Share Plan with Management	CEO				
Share Plan with Staff	Managers				
Launch Program 1	DIR of HR				
Assess Metrics	CHRO				
Launch Program 2	DIR of OPS				
Assess Metrics	COO				

Draft Your Plan Here

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Closing Thoughts

Reassess often. Culture shifts and can change in unintended ways if left to manage itself.

I'm a firm believer that follow-through must be driven by the top of the company. If senior leadership doesn't ask about culture and driving factors, then they're focusing on other priorities; which means the rest of the organization will also be focused on those other priorities.

How often are you asking your leaders what they're doing to reinforce the ideal culture?

What stories are you telling at all-hands meetings? Do they reflect your cultural goals?

And remember, while culture falls on every member of the organization, it always starts at the top and can stall at any level of the org chart.