

# Your Roadmap to Sustainable Mission

By The FiscalDoctor®



Name: \_\_\_\_\_

As you safeguard your organization's mission, where is there a better, safer, faster road? On a gradient from 1 (Strongly disagree) to 10 (Strongly agree), select where you are inside the colored gradient in terms of your board should address this. Use "X" = Now or "n/a" = not applicable to spotlight and record your priorities and plans.

Strongly disagree Strongly agree

1. **Accelerated blurred lines:** what will we look like in 10 years?

Strongly disagree Strongly agree

2. **Political correctness run amok:** erring on politeness when actually speaking out is more appropriate.

Strongly disagree Strongly agree

3. **Too many of us:** we might not survive future consolidation.

Strongly disagree Strongly agree

4. **Gold watch syndrome:** do we have the right board?

Strongly disagree Strongly agree

5. **Too much Motorola or Sears:** too much reliance on past success.

Strongly disagree Strongly agree

6. **Prioritize scarce resources:** Reallocate resources of people and money to think bigger.

Strongly disagree Strongly agree

7. **Follow the Money:** Value delivered on all activities justifies supporting all stakeholders' interests.

Strongly disagree Strongly agree

8. It seems to take forever to make a decision around here.

Strongly disagree Strongly agree

9. **Dying donors:** We need to replace donors who are dying.

Strongly disagree Strongly agree

10. **Too much rear view mirror:** Need more timely, right or accurate information for management and leadership.

Strongly disagree Strongly agree

11. Squandering director skills.

Strongly disagree Strongly agree

12. **Why should you exist:** we could benefit from clearer, more passionate stories delivered by all our people to illustrate our message?

Strongly disagree Strongly agree

13. **Balance fees charged and cost of delivery:** We could review if financial or social value received justifies financial and human delivery costs.

Strongly disagree Strongly agree

14. **Conservative balance sheet and processes:** some account balances are optimistic at this time.

Strongly disagree Strongly agree

15. **Long term accountability:** we could improve our long-term strategic plan with clearer numbers, more concrete objectives, and key results.

Strongly disagree Strongly agree

16. Grow customer use of our services.

Strongly disagree Strongly agree

17. **Failing the 3 M test:** we are not sufficiently focused on new products and services.

Strongly disagree Strongly agree

18. **Unwilling to take enough risk:** too much hedging rather than investing in "game changing" initiatives.

Strongly disagree Strongly agree

19. **Find new opportunities:** It is too comfortable to keep doing what we have been doing.

Strongly disagree Strongly agree

20. **Ostrich syndrome or Land of De Nile:** We don't do enough benchmarking of our company against other firms in our space or even outside our space.

Strongly disagree Strongly agree

## ACTION PLAN

What are your top three priorities?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Who can help you?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

When to start?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_