



STABLE-SPIRIT

"Where horses are living mirrors empowering positive change."

Client Goals & Expectations Assessment

Thank you for your interest in what Stable-Spirit could potentially do for your organization. We would like to learn more about your situation, your desired outcomes and get specific information so that we can see where we may best be of service.

Customer: _____ Telephone: [____] ____ - _____

Address: _____

Contact Name: _____ Fax: [____] ____ - _____

Title: _____ Email: _____

Business Unit: _____ Web: www. _____

Referral Source: _____

What is the need/situation?

1. What are the main business issues that you are facing right now? _____

2. On a scale from 1-5 with 5 being most like us and 1 being least like us, please rank the effectiveness of your organization pertaining to the following issues.

- a. ___ Have a compelling shared vision so that employees are motivated to work together in the same direction and that understanding and commitment to the overall business and its strategy is enhanced?
- b. ___ If you asked each manager individually what your company's overall business vision and strategy was, they would all be able to say the same thing.
- c. ___ All of your employees articulate the direction the company is going and their contribution to moving it forward.
- d. ___ Individual and group goals are consistent with each other and the organizational strategy.
- e. ___ The organizational structure supports cross functional communication and collaboration across business units.
- f. ___ Leaders are on the same page with respect to what needs to be done to maximize organizational performance.

- g. ___ The needed systems are in place to support the business strategy.
- h. ___ The organizational culture supports the overall direction of the business.
- i. ___ Management/Leadership team members are clear about their objectives and each other's roles.
- j. ___ There are individual and team performance measures that align with the overall business strategy.
- k. ___ Employees trust, cooperate with, and support each other.
- l. ___ There is little on no "fire fighting" and departments get planned work done on a timely basis.
- m. ___ There is a systematic way of hiring people to ensure that they fit the job as well as the organizational culture.
- n. ___ There is very little turnover within the company.
- o. ___ Revenues are consistently increasing.
- p. ___ The stress levels within the organization are minimal.
- q. ___ There is a good balance between efficiency and effectiveness.
- r. ___ There is a willingness to adapt and change as needed.

3. Which of these business issues are most pressing now? _____

4. What makes now a good time to change? _____

5. Have you ever used experiential learning before? What did the team do? What were the outcomes? _____

6. What is your desired outcome of this training? _____

7. What is your opinion of the biggest change needed within this organization? _____

THE TEAM

1. Who are the staff members who will be participating — names, titles, contact information and some background — responsibilities, etc.?

1) _____

2) _____

3) _____

4) _____

5) _____

6) _____

7) _____

8) _____

9) _____

10) _____

11) _____

12) _____



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