

BENEPLACE



Beneplace ***Culture Audit***

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"If you get the culture right, most of the other stuff will just take care of itself."

Tony Hsieh, founder and CEO of Zappos.com

How to Use This

This culture audit is designed to help you and your organization evaluate where you are and where you want to go as a company. We aren't focused on strategy, but on your culture.

"The fact is, culture eats strategy for lunch."
- *Richard Clark, retired CEO of Merck & Co.*

You are going to look at your company's culture **quantitatively** and **qualitatively**.

Quantitatively, you will evaluate your organization in five (5) areas:

- Values & Mission
- Retention & Loyalty
- Social, Environmental & Governance Responsibilities
- Communication
- Diversity & Inclusion

You'll score your organization's performance against questions or statements in the document. At the end of each section, you'll add up the total score. For instance, four (4) Strongly Agree responses would be worth twenty (20) points ($4 \times 5 = 20$), and three (3) Agree responses are worth twelve (12) points ($3 \times 4 = 12$). The score for that section would be 32 points.

Qualitatively, you will assess your company across four (4) major dimensions:

- Values
- Leadership
- Leadership & Employees
- Employees

You'll respond to questions with short written answers.

To Get Started—

- Breathe deeply. This feels like a lot. This isn't an initiative that should wait till after open enrollment or two years later. (Culture is too important for that!)
- Start. Don't put a committee together. Don't delegate this. Don't hire a resource to handle this and survey everyone.
- Choose a section to begin with. The qualitative section is likely to provoke more thought while the quantitative section can often be completed more quickly. Simply start in either section, and spend about 30–45 minutes answering to the best of your ability.
- You'll want to compare your scores in the quantitative section with your answers in the qualitative section to identify if there's alignment between overlapping sections.
- Review your answers as well and ask a few colleagues in your department or in other departments to also spend some time on this. Again, this will take 30–45 minutes.
- Over a lunch or coffee, share your findings.
- If you are in the C-Suite, begin a plan to engage other leaders and frontline employees in a complete and anonymous culture audit. This will have a huge positive impact.
- If you are in a place to drive the change, identify two or three tactical items you can begin working on.
- If you need a team or other managers to help begin this process, identify one or two items you can begin with together. In the meantime, identify other stakeholders who can help and are invested in the culture.
- In six months, evaluate where you are and begin sharing the results of actions you and/or other managers have taken. This will build internal and personal momentum to continue with this process.
- Continue the process annually for constant improvement for the employees and the organization.



Values



Values & Mission

	Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Values	The organization has a set of values it identifies with.	<input type="checkbox"/>				
	Employees agree with the company values.	<input type="checkbox"/>				
	Customers and clients ultimately benefit from the company values.	<input type="checkbox"/>				
Mission	The organization identifies with a mission statement or vision.	<input type="checkbox"/>				
	The organization's mission statement and/or vision are inspired by the company values.	<input type="checkbox"/>				
Knowledge of Company History	The organization employs a strategic narrative to tell employees and outsiders about its own history.	<input type="checkbox"/>				
	The company's narrative conveys the idea that employees are working toward a shared purpose.	<input type="checkbox"/>				

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Rigidity of Company Values/ Mission

The company values and mission statement have evolved through the years.

Knowledge of Company Mission

All employees are aware of the company's mission.

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Communication

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Employees at all levels are regularly updated about the company's direction and future plans.

Communication channels are open across all departments and seniority levels.

Score:

_____ Strongly Agree _____ Agree _____ Undecided _____ Disagree _____ Strongly Disagree

Total Score: _____





Retention & Loyalty

	Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Onboarding Practices	New hires go through some type of onboarding program.	<input type="checkbox"/>				
	New hires receive training before they begin working in their roles.	<input type="checkbox"/>				
Employee Engagement	Employee engagement is actively monitored.	<input type="checkbox"/>				
	The organization developed a strategy to improve employee engagement.	<input type="checkbox"/>				
Supplemental Benefits	Employees have access to supplemental benefits and employee perks.	<input type="checkbox"/>				
Turnover Rate Trend	The organization is satisfied with its turnover rate.	<input type="checkbox"/>				
	The turnover rate has decreased through the years.	<input type="checkbox"/>				
Turnover	The organization has a strategy to decrease turnover.	<input type="checkbox"/>				
	Employees are asked to complete exit surveys when they decide to leave the firm.	<input type="checkbox"/>				

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Reason for Turnover

Employees usually leave the company for external reasons, such as relocation, change of industry, personal reasons, etc.

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Diversity & Inclusion

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
The company's workforce is representative of a diverse population.	<input type="checkbox"/>				
The organization promotes diversity and inclusion through its recruitment practices.	<input type="checkbox"/>				
The organization promotes diversity and inclusion through its hiring practices.	<input type="checkbox"/>				
The company's policies promote diversity and inclusion beyond what is mandated by law.	<input type="checkbox"/>				
The company's diversity and inclusion policies extend to gender and sexual identity.	<input type="checkbox"/>				

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____



Social, Environmental & Governance Responsibilities

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Charitable giving to the local community is important to the organization.	<input type="checkbox"/>				
Volunteering opportunities are available for employees wishing to connect to the local community.	<input type="checkbox"/>				
The organization considers social, environmental, and governance factors when evaluating corporate plans.	<input type="checkbox"/>				
The organization values and promotes compliance and transparency.	<input type="checkbox"/>				

Score:

_____ Strongly Agree _____ Agree _____ Undecided _____ Disagree _____ Strongly Disagree

Total Score: _____

Section Score: _____

Leadership



Leadership Style

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Leadership delegates authority and responsibility when needed.	<input type="checkbox"/>				
Leadership openly shares information and knowledge with employees.	<input type="checkbox"/>				
Leadership welcomes constructive criticism and discussion.	<input type="checkbox"/>				
Leadership handles disagreements professionally.	<input type="checkbox"/>				
Leadership makes decisions in a transparent and fair fashion.	<input type="checkbox"/>				
Leadership shows tolerance and flexibility.	<input type="checkbox"/>				
Employees are involved in decision-making regarding their day-to-day work.	<input type="checkbox"/>				
Leadership communicates effectively.	<input type="checkbox"/>				

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Leadership displays excellent communication skills.	<input type="checkbox"/>				
Leadership's behavior is consistent with the company values.	<input type="checkbox"/>				
Leaders are role models for employees.	<input type="checkbox"/>				

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Performance

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Regularity of Performance Evaluation Leadership's performance is evaluated regularly.	<input type="checkbox"/>				
Formality of Performance Evaluation Leadership's performance undergoes formal evaluation.	<input type="checkbox"/>				
Accountability Leaders are held accountable for their decisions, actions, and performance.	<input type="checkbox"/>				

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____



Origin of Leaders

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

The organization prefers to fill leadership and managerial roles in-house, rather than externally.

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Learning & Development

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Training Preceding Promotion

Employees are required to complete mandatory training before transitioning into leadership roles.

Continuing Development

Leadership is required to fulfill training and learning obligations regularly.

Voluntary learning and development opportunities are available to leadership.

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Relative Demographics

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Leadership's demographics is representative of a diverse population.

Leadership's demographics mirrors the company's overall demographics.

Score:

_____ Strongly Agree _____ Agree _____ Undecided _____ Disagree _____ Strongly Disagree

Total Score: _____

Section Score: _____



Leadership & Employees



Role Expectations

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Employees are aware of what is expected of their role.	<input type="checkbox"/>				
Employees are aware of the purpose of their work.	<input type="checkbox"/>				
Leadership holds regular team meetings.	<input type="checkbox"/>				
Leadership holds regular 1-on-1 meetings with employees/team members.	<input type="checkbox"/>				

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____



Rewards & Recognition

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Employees are publicly acknowledged for their performance (e.g., through company intranet, emails, social media, company events, etc).

Employees receive financial rewards for their performance (e.g. bonus checks, gift cards, free lunches, etc.).

Employees receive non-financial rewards for their performance (e.g., additional vacation days, remote work opportunities, etc).

Leadership/management shares rewards and acknowledgment for performance and achievements with its team and co-workers.

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____



Feedback Exchange

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
The organization has formal channels for employees to provide feedback to leadership.	<input type="checkbox"/>				
The organization has formal channels for leadership to provide feedback to employees.	<input type="checkbox"/>				
Employees are encouraged to exchange feedback whenever it is needed.	<input type="checkbox"/>				
Employees have the option of providing their feedback anonymously.	<input type="checkbox"/>				
Leadership acts upon employees' feedback.	<input type="checkbox"/>				
Leadership still addresses employees' feedback even if it doesn't act upon it.	<input type="checkbox"/>				

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____



Nature of Employee-Leadership Relationship

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

It is leadership's responsibility to ensure employee morale remains high.

Leadership shows interest for employees' well-being and personal life.

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Coaching/Mentorship Opportunities

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Leadership and employees engage in coaching and mentorship opportunities.	<input type="checkbox"/>				
Leadership is able to convey complex concepts in a simple and effective way to other employees.	<input type="checkbox"/>				

Score:

_____ Strongly Agree _____ Agree _____ Undecided _____ Disagree _____ Strongly Disagree

Total Score: _____





Team Building & Sense of Community

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Encouraged During Work Hours

Employees are encouraged to socialize with their co-workers during work hours (e.g., coffee breaks, common lunch areas, etc).

Encouraged Outside of Work Hours

Employees are encouraged to socialize with their co-workers outside of the office (e.g. company events, dinners, sport events, etc.).

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____

Section Score: _____

Employees



Recruitment

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Information About Company Values & Mission (Applicants) Information about the company's values, mission, and history is readily available to job applicants (e.g., through the company website).	<input type="checkbox"/>				
The organization's recruitment efforts target a diverse population.	<input type="checkbox"/>				
Cultural Fit of Candidates Job applicants are screened for cultural fit during the recruitment process.	<input type="checkbox"/>				

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____



Day-to-Day Work

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Resources & Support

Employees receive adequate support and resources to perform their job.

Purpose & Goals

Employees understand the purpose and the goals of their work.

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Career & Pay Progression

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Career Progression					
Employees have clear expectations about what career opportunities are open to them within the company.	<input type="checkbox"/>				
Horizontal mobility is encouraged within the firm (e.g., across different teams, departments, etc).	<input type="checkbox"/>				
Career progression follows an institutionalized path that is disclosed to employees.	<input type="checkbox"/>				
Employees need to fulfill quantitative requirements before transitioning to a more senior role.	<input type="checkbox"/>				
Employees need to fulfill qualitative requirements before transitioning to a more senior role.	<input type="checkbox"/>				
Pay Increase					
Information about pay increase following career progression is available to employees.	<input type="checkbox"/>				

Score:

_____ Strongly Agree
_____ Agree
_____ Undecided
_____ Disagree
_____ Strongly Disagree

Total Score: _____



Learning & Development

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

L&D Opportunities

Voluntary learning and development opportunities are available to employees.

Employees regularly attend mandatory training and development sessions.

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Performance Evaluation

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
Employees' performance is evaluated regularly.	<input type="checkbox"/>				
Employees' performance undergoes formal evaluation.	<input type="checkbox"/>				
Performance evaluation criteria are disclosed to employees.	<input type="checkbox"/>				

Score:

_____ **Strongly Agree** _____ **Agree** _____ **Undecided** _____ **Disagree** _____ **Strongly Disagree**

Total Score: _____





Morale & Stress Management

Question	Strongly Agree (5)	Agree (4)	Undecided (3)	Disagree (2)	Strongly Disagree (1)
----------	-----------------------	--------------	------------------	-----------------	--------------------------

Strategy

The organization has developed a strategy to improve employee morale and reduce workplace-related stress and burnout.

Channels to Report Stress & Burnout

Employees can report workplace-related stress and burnout through institutional channels.

Response to Reporting

The organization addresses all reported cases of workplace-related stress and burnout.

The organization addresses cases of workplace-related stress and burnout in a timely fashion.

Score:

_____ Strongly Agree _____ Agree _____ Undecided _____ Disagree _____ Strongly Disagree

Total Score: _____

Total Section Score: _____

Score Breakdown

Score	Excellent	Above Average	Average	Below Average	Needs Improvement
Range	450-378	377-306	305- 234	233-162	161-90





Values

Clear Values and Mission Statement:

- What are the values the organization identifies with?

- Have these values evolved through the years? If yes, how?

- What is the company's mission statement or vision, and how does it relate to the organization's values?

Narrative & History:

- What elements of the company's history are actively narrated within the organization, and why?

- How often and openly are employees updated about the company's future plans and direction?

Value Sharing, Traditions & Sense of Community:

- What are the ways the organization's values and mission statement/vision are communicated and reinforced within the company?

- What are the traditions and rituals of the organization?



Demographics:

- What are the organization's demographics? How do these influence the company's values?
- How have these demographics evolved through the years?
- What are the organization's strategies to promote inclusiveness within the company?

Connection to Local Community & Social Responsibility:

- How does the organization connect with the local community?
- Does the organization provide employees with opportunities to volunteer and give back to the local community?

Leadership

Values & Mission Reinforcement:

- How can leadership's management style be characterized?
- What role does leadership have in shaping the company's values?

Performance Evaluation:

- How often is leadership performance evaluated?
- How is leadership performance assessed? What metrics and evaluation systems are put in place to keep leadership accountable?

Learning & Development:

- How are employees prepared to transition into a leadership role?
- What development and continuing learning opportunities are available to leadership?



Leadership & Employees

Expectations, Rewards & Recognition:

- How are role expectations effectively communicated to employees?

- How is desired behavior encouraged and rewarded? What recognition programs are in place?

Feedback Exchange:

- What formal channels exist for employees to provide feedback to leadership?

- How often can employees provide feedback to leadership?

- What formal channels exist for leadership and management to provide feedback to employees?

- How often can leadership provide feedback to employees?

- How does leadership address employees' feedback and requests?





Decision-Making Process:

- Are decisions made in a collaborative or hierarchical fashion?
- To what extent are employees consulted about decisions affecting their day-to-day job?

Mentorship & Coaching:

- What coaching and mentorship opportunities are available within the organization?

Relative Demographics:

- How do the demographics of the company's leadership compare to those of the main workforce?



Employees

Recruitment:

- How can job applicants learn about the company's mission statement and values? Is this information readily available to them?
- What demographics are the target of the company's recruitment efforts, and why?
- How and when are candidates screened for cultural fit?

Retention & Employee Loyalty:

- What onboarding processes and practices exist in the organization?
- Is employee engagement monitored? If yes, how?
- What employee benefits does the organization offer?
- What is the organization's turnover rate, and what is its historical trend?
- What strategies are implemented to improve the turnover rate?
- Why do employees usually decide to leave the firm?



Career & Pay Progression:

- Is career progression clearly explained to employees?

- Are both vertical and horizontal mobility encouraged within the company?

- How can employees access leadership roles? Is there an institutionalized process? Are the requirements qualitative, quantitative, or both?

- Can employees have clear expectations about pay increase following career progression?

Learning & Development:

- What training and development opportunities are offered to employees?

Performance Evaluation:

- How often is employee performance evaluated?

- How is employee performance assessed? What metrics and evaluation systems are put in place to keep employees accountable?

- Are employees aware of the criteria used to evaluate their performance?



Employee Morale & Stress Management:

- What strategies does the company implement to promote employee well-being and stress management?

- What channels are available for employees to report burnout and stress in the workplace?

- How are these concerns addressed?

Team Building & Sense of Community:

- To what degree is teamwork encouraged during day-to-day work?

- How is socialization encouraged during work hours (e.g. common dining areas, break times, birthday celebrations)?

- How is socialization encouraged outside of the office?

- What other team-building strategies are implemented?

Quantitative Summary

1. Does the score align with your sense of the company's cultural health? Why or why not?
2. Would other leaders agree with this score? Why or why not?
3. Would employees agree with this score? Why or why not?
4. Which area with the lowest score is of the most concern? Why?
5. Are you surprised by where you scored highest? Why or why not?
6. What areas (**Values & Mission, Communication, Retention & Loyalty, Diversity & Inclusion, Social, Environmental & Governance Responsibilities**) are the most important to address in the next 12-18 months?



Qualitative Summary

1. After evaluating your organization, what are the top two or three themes that emerged?
2. Based on your evaluation of your organization, do you think alignment exists between stated values and company practices? Where are the gaps?
3. Is there alignment between the organization's stated mission and company practices? Where are the gaps?
4. Which areas are strengths?
5. Which areas (**Values, Leadership, Leadership & Employees, or Employees**) are the highest priority in the next 12–18 months?



General Summary

1. Between the quantitative and qualitative sections, which are the most pressing areas to improve?
2. Between the two sections, which strengths does the company need to continue to invest in?
3. What are the 2-3 most crucial themes from this audit for the company to focus on?
4. What initiatives that follow from those themes will have the greatest impact?
5. What are action items HR can take?
6. What are action items the C-suite can take to either improve a weakness or maintain a strength?
7. What are action items individual managers can take?
8. What actions can individual employees or teams take?
9. Will others agree and provide the needed resources and support to make the changes?
10. Who will spearhead these initiatives?
11. How will the company stay on track with these efforts?
12. How will the company measure the effectiveness of efforts?

Now that you've completed this audit, how do you feel about your company culture?

Got questions on what to do next? Register for our next educational webinar at www.beneplace.com!