

## Stage 2: Organisational Assessment – Expertise-Driven Organisation

### Purpose:

*Assess your firm's organisational expertise, linking strategy (Stage 1) to execution, and providing a clear view of strengths, gaps, and priorities.*

### Objectives



Assess Organisation Capabilities



Link Strategy to Execution



Establish a Measurable Benchmark



Prioritise Development Areas

### Assessment Domains

The Organisational Assessment evaluates each SBU or functional unit against the following internal and external domains using weighted scoring to produce a Priority Score for each area.

#### EXTERNAL EXPERTISE DOMAINS



Sector Authority – credibility in industry



Client Relationships – trust & influence



Technical & Advisory Expertise – applied skill



Brand & Visibility – market presence

#### INTERNAL EXPERTISE DOMAINS



Methodology & Process – structured frameworks



Relationships & Networks – collaboration & knowledge sharing



Data & Technology – analytics, platforms, AI readiness



Ethics & Sustainability – values-driven execution

## External Domains

External domains measure a firm's market-facing influence including its ability to attract, retain, and impress clients through expertise, credibility, and visibility. Each domain is scored 1–5 across four key criteria:

1. **Experience:** Breadth and depth of involvement in relevant sectors, client types, or engagements, demonstrating practical understanding and versatility.
2. **Track Record:** Documented evidence of past successes, including completed projects, client testimonials, and measurable results.
3. **Knowledge & Skill:** Domain-specific expertise, technical ability, and applied proficiency, supported by education, certifications, and hands-on experience.
4. **Credibility & Reputation:** Perceived trustworthiness and authority, built through consistent performance, ethical conduct, and recognition in the market.

## Internal Domains

These domains capture the firm's internal strengths that enable high-quality service delivery, effective collaboration, technological leverage, and adherence to ethical and sustainable practices. They include:

1. **Methodology and Process:** Focuses on the frameworks, procedures, and structured approaches that guide how work is performed.
2. **Relationships and Networks:** Encompasses both internal collaboration and external connections that support knowledge sharing, partnerships, and professional influence.
3. **Data and Technology:** Covers the tools, systems, and data-driven capabilities that enhance decision-making, automate processes, and support innovation.
4. **Ethics and Sustainability:** Represents the firm's commitment to integrity, responsible practices, and long-term societal and environmental impact.

## Domain Scoring

Each domain is evaluated using five criteria: Capability, Consistency, Scalability, Knowledge Codification, and Alignment with Values, with performance rated from 1 (Emerging/Minimal) to 5 (Leading/Best in class) as guided through our proprietary rubric.

## Strategic Outcomes

The results of the assessment are integrated into a Diagnostic Map, providing a comprehensive view of strengths, gaps, and alignment:

1. **High-Performing Domains:** Areas where the firm exceeds market standards and can leverage competitive advantage
2. **Alignment Analysis:** Comparison of current capabilities with your intended Target Expert Profile
3. **Gap Identification:** Domains requiring investment, capability development, or digital enablement

**Outcome:** Identified gaps and priorities to be addressed in a detailed actionable roadmap to be prepared in subsequent stages.

## Why Stage 2 Matters

Stage 2 transforms insight into action. It ensures your firm:

- Leverages existing strengths effectively
- Prioritises areas for development
- Aligns strategy with execution
- Establishes a clear path to becoming an Expertise-Driven Organisation