



Express Report

StrategyFit Index

Assessment instrument: Strategic Planning

SAMPLE

PREPARED FOR

Maria Example

Operations Director · Example Company Inc.

Date: 13/10/2026 · Order: SAMPLE

Before you read

This is a sample report, created with fictitious answers and data to show the format and content of the deliverable.

The indices, stages, profiles, comparisons and recommendations do not describe any real person or company and must not be used for decisions.

The official report is generated from the buyer's own answers, without a watermark, and sent to the e-mail given in the order.

See the products at www.ideavus.com.br/en/loja

SAMPLE

Summary

The essentials of this report on one page.

INDEX

50

STAGE

Emerging

PROFILE

Executes without a compass

Three strengths

Communication, Culture and Monitoring
Governance and Strategic Risks
Deployment and Execution

75

71

54

Three priorities

Strategy Formulation
Strategic and Context Analysis
Business Model and Viability

25

42

46

FIRST ACTION, THIS WEEK

Rewrite the vision in one sentence anyone can understand.

Your result

The index ranges from 0 to 100 and summarizes your view of the six pillars of the assessment. The stage shows where the organization stands today on the maturity path.

50

out of 100

STAGE

Emerging

Structured plan with gaps in deployment and monitoring; enabling and limiting elements coexist.

The six stages

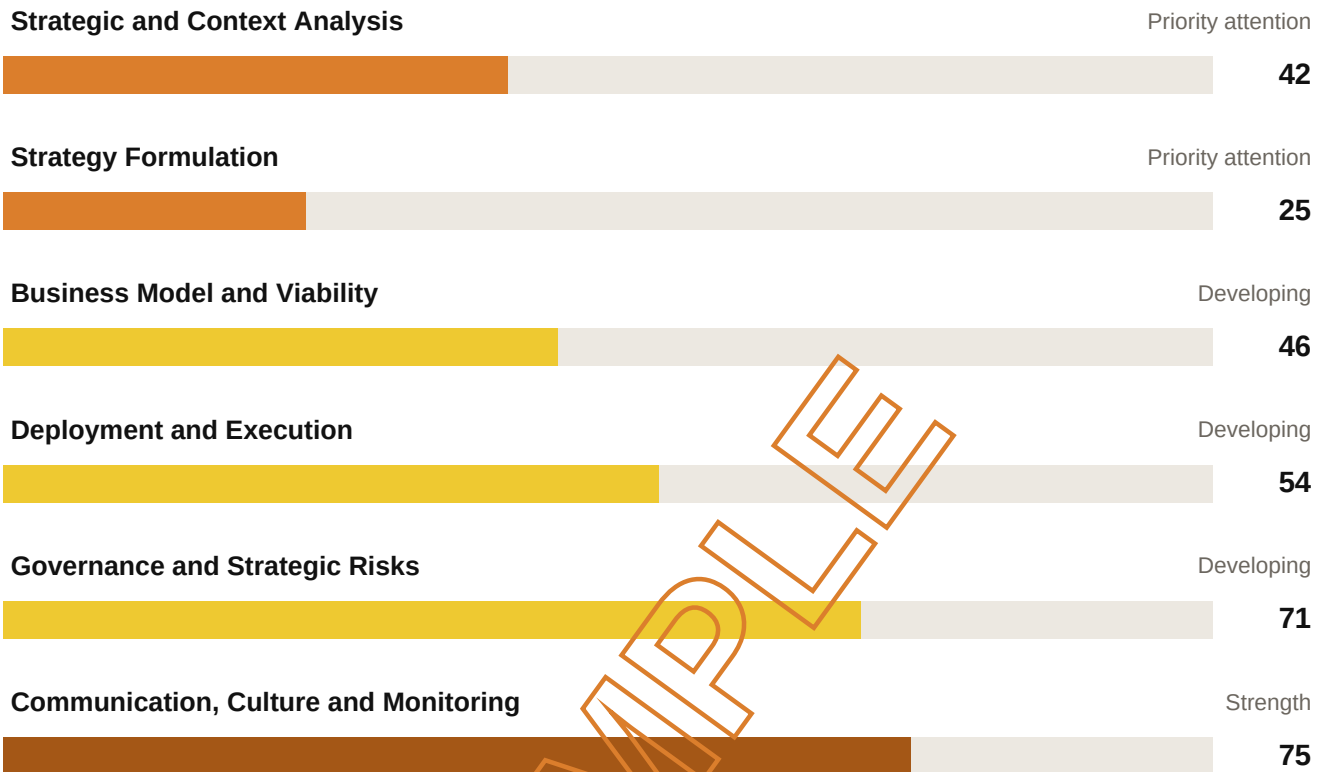


What this stage calls for now

- Break objectives down into area plans with owners and milestones.
- Set up a quarterly review routine.
- Define a few strategic indicators and track them.

The six pillars

Each bar shows the pillar result from 0 to 100. The color shows where to focus attention.



STRONGEST POINT

Communication, Culture and Monitoring · 75

POINT THAT NEEDS THE MOST ATTENTION

Strategy Formulation · 25

The organization's profile

The combination of pillars forms a pattern of how the organization works, in your view. It describes how it tends to act today, and it can change.

Executes without a compass

The organization delivers with discipline and meets deadlines. This keeps operations running well. There is little clarity on where to go, and effort may be in the wrong place.

Core recommendation

Pause to analyze the market and choose a few priorities for the next cycle.

What shaped this profile

PILLARS PULLING AHEAD

Deployment and Execution



54

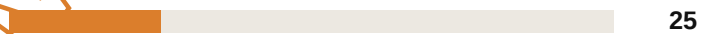
PILLARS HOLDING BACK

Strategic and Context Analysis



42

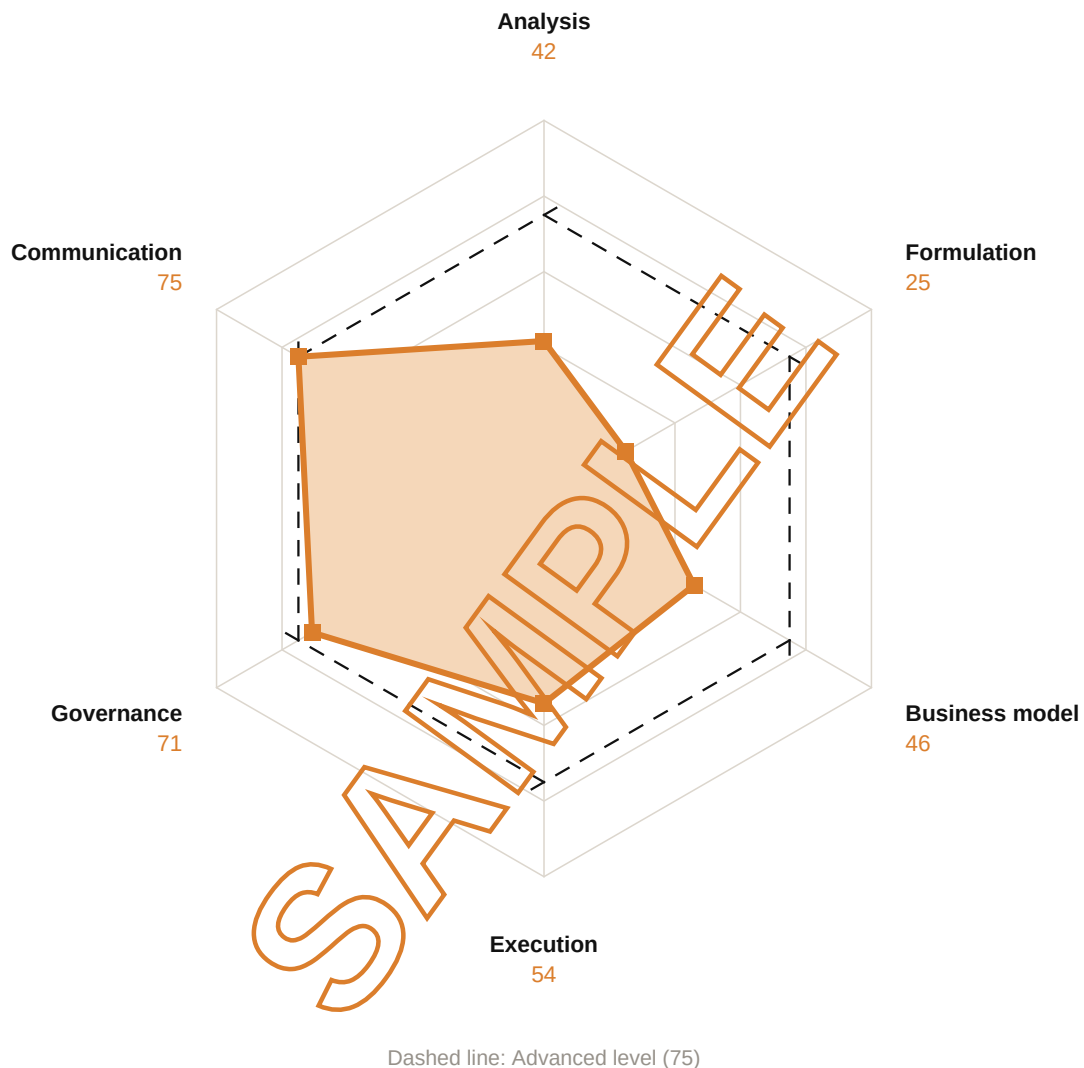
Strategy Formulation



25

Your profile at a glance

The shape shows the organization's profile in your view. Peaks and dips show where it relies on strengths and where there is room to grow.

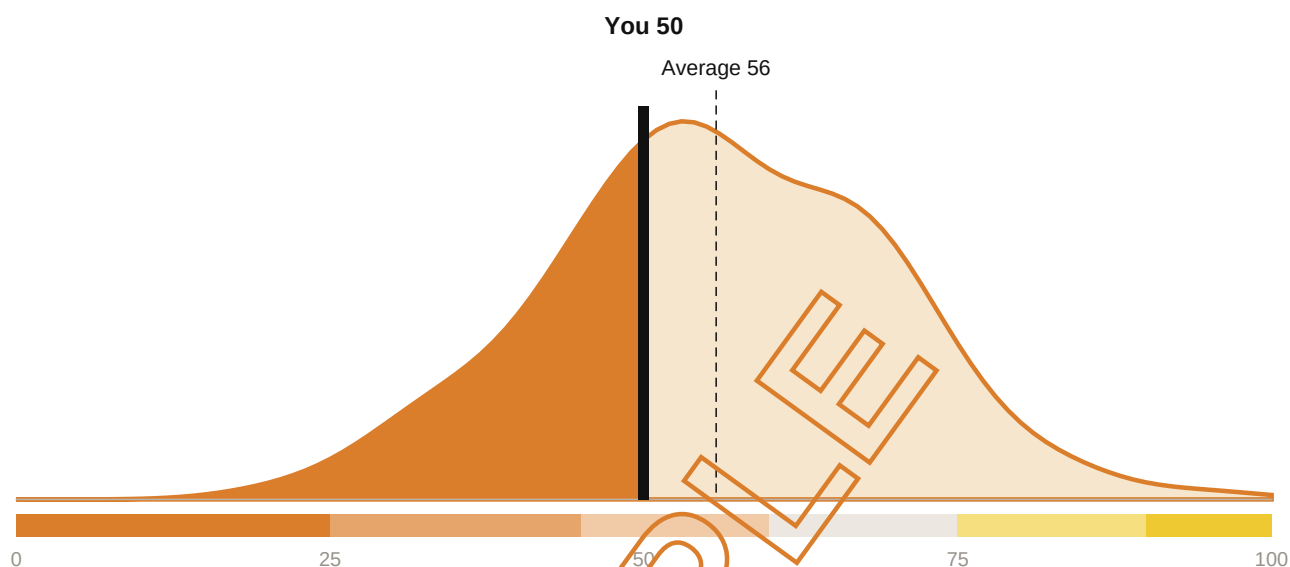


Profile balance

Gap between the highest and lowest pillar: 50 points. Profile with strong contrasts: one or two pillars are well below the rest and tend to limit the others. Start with them.

How you compare

The curve shows how the indices of people who have taken this assessment are distributed. The marker shows your position.



Your index is higher than 32% of respondents.

Comparison base: 240 respondents. Example with a fictitious base, for demonstration only.

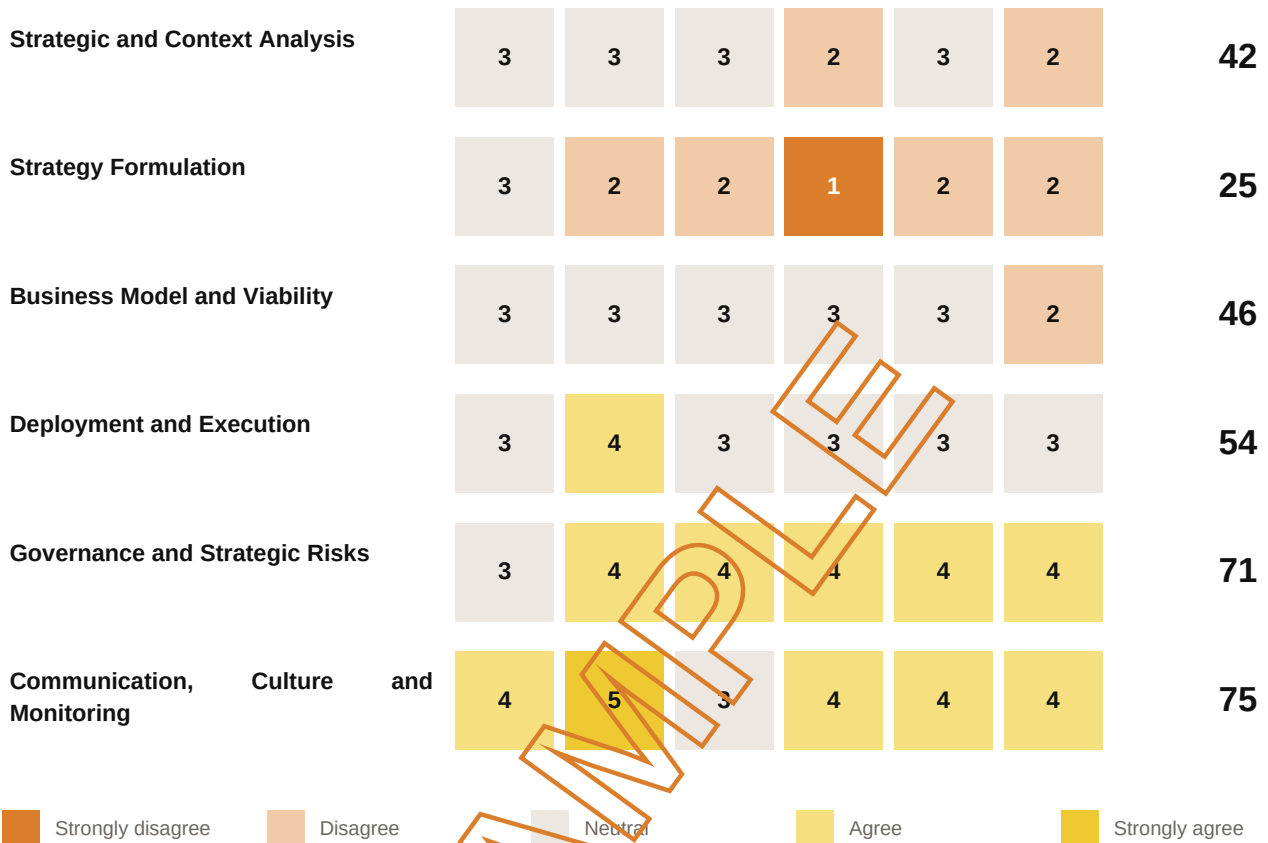
Your pillars compared to the average



The comparison shows relative position, not absolute quality. Comparison bases change over time and with the profile of respondents.

Heat map of your answers

Each square is one statement, grouped by pillar. Colors go from orange (disagree) to gold (agree) and show where each pillar result comes from.



Statements that stand out

The statements with the highest and lowest answers. They help turn the index into concrete day-to-day examples.

Where the organization is strongest

- 5** We hold regular alignment meetings about the strategy.
Communication, Culture and Monitoring
- 4** Departmental targets are linked to strategic targets.
Deployment and Execution
- 4** We formally address conflicts of interest in strategic decisions.
Governance and Strategic Risks
- 4** We conduct thorough due diligence before major investments or acquisitions.
Governance and Strategic Risks
- 4** We set exposure limits for our main strategic risks.
Governance and Strategic Risks

Where the organization most needs to advance

- 1** We consider alliances, partnerships, or acquisitions as paths to deliver our strategy.
Strategy Formulation
- 2** We are clear about the resources and capabilities that underpin our competitiveness.
Strategic and Context Analysis
- 2** We base our strategic analysis on verifiable data.
Strategic and Context Analysis
- 2** We explore uncontested market spaces with new value propositions.
Strategy Formulation
- 2** Our objectives balance financial results, customers, internal processes, and learning.
Strategy Formulation

Pillar by pillar

Strategic and Context Analysis

42

Priority attention

What this result usually indicates

Strategic decisions rely more on leadership's perception than on data about the market, customers and competitors. Industry changes are usually noticed late, once they already hurt sales.

Recommended actions for the next 90 days

1. Run a half-day external environment analysis with the leadership team, recording threats and opportunities.
2. Interview ten customers, including lost ones, to understand why they choose or leave the company.
3. List the three capabilities that most support current competitiveness and validate them with data.

Strategy Formulation

25

Priority attention

What this result usually indicates

There is no clear, written strategy; each area interprets priorities its own way. Objectives tend to be purely financial and growth opportunities are assessed case by case.

Recommended actions for the next 90 days

1. Write the strategy on one page: three-year objective, markets served and advantage over competitors.
2. Define up to five strategic objectives covering finance, customers, processes and people.
3. Publish the strategy document where all managers can access it.

Business Model and Viability

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Developing

What this result usually indicates

The company calculates the viability of its main investments, but forecasts tend to be optimistic. The business model is rarely tested for its ability to grow without costs rising at the same rate.

Recommended actions for the next 90 days

1. Compare forecasts for the last three investments with actual results and adjust the method.
2. Require a pessimistic scenario in every significant investment analysis.
3. Analyze how fixed and variable costs behave if sales double.

Deployment and Execution

54

Developing

What this result usually indicates

Area targets are linked to strategy, but plans are made in isolation and compete for the same people. Incentives and talent allocation do not yet follow priorities.

Recommended actions for the next 90 days

1. Run a joint planning session across areas to resolve resource conflicts.
2. Review who is assigned to priority initiatives and fix skill gaps.
3. Tie part of managers' variable pay to one or two strategic targets.

Governance and Strategic Risks

71

Developing

What this result usually indicates

There are decision rules and some risk management, but application is inconsistent and depends on who handles the matter. Accountability for strategic results is more informal than formal.

Recommended actions for the next 90 days

1. Set up a quarterly leadership accountability meeting on strategic results.
2. Formalize conflict of interest declarations in every significant strategic decision.
3. Add reputational risk assessment to the standard project approval template.

Communication, Culture and Monitoring

75

Strength

What this result usually indicates

People understand the strategy, indicators are tracked in defined cycles and monitoring leads to revisiting assumptions. Managers know how to drive execution.

Recommended actions for the next 90 days

1. Record the decisions made at each review and check in the next cycle whether they were carried out.
2. Hear from front-line teams before the annual strategy review.
3. Avoid repetitive alignment meetings; shorten them when there are no decisions to make.

What your set of results indicates

More than each pillar alone, the combination says a lot about what to do first.

Strengths to use in your favor

Your highest pillars are Communication, Culture and Monitoring and Governance and Strategic Risks. Use these strengths as leverage: they are the shortest path to improving the lowest pillars.

What may be holding the rest back

Strategy Formulation is the pillar with the lowest result. When one pillar is far below the others, it tends to limit the effect of everything that already works well.

Combination worth attention

The largest gap is between Communication, Culture and Monitoring (75) and Strategy Formulation (25). Use the first to support the development of the second in the coming weeks.

Consistency of answers

Your answers vary little within each pillar. Each pillar result is a good summary of what you marked.

SAMPLE

From the current stage to the next

For the two lowest pillars, what day-to-day looks like at the current level and what it looks like at the next.

Strategy Formulation · 25

TODAY

- Mission and vision are not written or not used.
- There are many objectives without priority.
- Nobody knows what the organization decided not to do.

AT THE NEXT LEVEL

- Objectives are written but generic.
- Priorities exist and change often.
- Hard choices are postponed.

Strategic and Context Analysis · 42

TODAY

- The plan starts from leaders' intuition.
- Competitors and customers are barely studied.
- Market changes come as a surprise.

AT THE NEXT LEVEL

- There are occasional analyses before the planning cycle.
- Data exists but is scattered.
- Analysis tools are used superficially.

Your first week

Small actions to start now, tied to the pillar that needs the most attention. Each one takes less than an hour.

Strategy Formulation

DAY 1	Rewrite the vision in one sentence anyone can understand.	☐ Done
DAY 2	List the current objectives and mark the three most important.	☐ Done
DAY 3	Write two things the organization decided not to do this year.	☐ Done
DAY 4	Set a target number and a deadline for the main objective.	☐ Done
DAY 5	Ask two managers to challenge a current strategic choice.	☐ Done

90-day plan

A plan in three waves, starting with the pillars with the lowest results. Fill in owner and deadline and review progress every 30 days.

Days 1 to 30

Focus: Strategy Formulation

1. Write the strategy on one page: three-year objective, markets served and advantage over competitors.

Owner: _____ Deadline: ____/____

2. Define up to five strategic objectives covering finance, customers, processes and people.

Owner: _____ Deadline: ____/____

3. Publish the strategy document where all managers can access it.

Owner: _____ Deadline: ____/____

Days 31 to 60

Focus: Strategic and Context Analysis

1. Run a half-day external environment analysis with the leadership team, recording threats and opportunities.

Owner: _____ Deadline: ____/____

2. Interview ten customers, including lost ones, to understand why they choose or leave the company.

Owner: _____ Deadline: ____/____

3. List the three capabilities that most support current competitiveness and validate them with data.

Owner: _____ Deadline: ____/____

Days 61 to 90

Focus: Business Model and Viability

1. Compare forecasts for the last three investments with actual results and adjust the method.

Owner: _____ Deadline: ____/____

2. Require a pessimistic scenario in every significant investment analysis.

Owner: _____ Deadline: ____/____

3. Analyze how fixed and variable costs behave if sales double.

Owner: _____ Deadline: ____/____

Follow-up and reflection

Use this page to record what changed. Come back to it at 30, 60 and 90 days.

1. Which result in this report most surprises leadership, and why?

2. What recent situation shows the organization's strongest pillar well?

3. What stops progress today on the lowest pillar?

4. Who needs to discuss this report in the next two weeks?

5. How will we know in 90 days that there has been progress?

Checkpoint	What I did	What changed	Next step
30 days			
60 days			
90 days			

Pillar glossary

What each pillar means and why it matters.

Strategic and Context Analysis

Shows whether the organization studies the market, competitors, customers and its own capabilities methodically. Strategy made without looking outside repeats the past and is surprised by predictable changes.

Strategy Formulation

Assesses whether there are clear mission, vision, objectives and choices about where to compete and what not to do. Explicit choices keep resources from spreading across too many priorities.

Business Model and Viability

Indicates whether the organization understands how it creates value, who pays for it and whether the numbers work in the medium term. A strategy only holds when the business model funds it.

Deployment and Execution

Measures whether objectives become targets, projects, owners and budget in each area. This is where most plans get lost, between the document and daily work.

Governance and Strategic Risks

Checks whether there are forums, roles and routines to decide, review strategy and handle relevant risks. Good governance keeps big decisions from depending on one person or on improvisation.

Communication, Culture and Monitoring

Shows whether strategy is communicated, understood and tracked with indicators routinely. What is not measured or discussed often stops being a priority within weeks.

Your next steps

A report shows today's picture. Progress shows up when you measure again.

Retake this assessment every 6 months

Behaviors and practices change over time. Retake it twice a year, around April 2027 and October 2027, and the new report shows your progress pillar by pillar compared with this one.

[Retake the assessment](#)

Assessments that complement this one

AIReady Index

Whether the company is ready to create value with AI.

[Learn more >](#)

ChangeReady Index

Whether the company is ready for the next change.

[Learn more >](#)

ImpactReady Index

Where the company stands on ESG.

[Learn more >](#)

Want a reading of the whole company?

With many people answering, the diagnostic shows where the organization stands, the differences between areas and an action plan for leadership.

[Diagnostics for companies](#)

Limits of this reading and next steps

This report shows one person's view. It is a good way to open the conversation, but it does not replace the team's reading.

In the full assessment, Ideavus applies the instrument to many people and delivers the map by area, the perception gaps between leaders and teams, the comparison with similar organizations and an action plan built with you.

To track progress, answer again in six months using the same criterion: think of the organization as it works today, not as it should work.

Want this picture with the whole team?

Talk to Ideavus: contato@ideavus.com.br · www.ideavus.com.br

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