

Culture Self-Assessment Checklist

10 Questions to Evaluate Your Firm

Answer **Yes** or **No** to each question. Count your Yes responses to determine your score.

COMMUNICATION

- Yes** **No** Can every team member accurately describe the firm's top three priorities for the next 12 months?
- Yes** **No** Do team members consistently hear important news from leadership before hearing it through informal channels?

GROWTH PATHS

- Yes** **No** Can you name the specific next role or growth opportunity for each of your top three performers?
- Yes** **No** Have you discussed individual development paths with each team member in the past six months?

DECISION RIGHTS

- Yes** **No** Do team members have clearly defined decisions they can make without seeking approval?
- Yes** **No** Has decision-making authority expanded for team members as they have demonstrated competence?

RECOGNITION

- Yes** **No** Do you regularly recognize contributions beyond revenue production (mentorship, collaboration, client outcomes)?
- Yes** **No** Can you recall specific examples of public recognition you gave in the past 30 days?

DEVELOPMENT

- Yes** **No** Does your firm have a documented budget line item for training and professional development?
- Yes** **No** Has your investment in team development increased over the past three years?

YOUR SCORE: _____ **Yes responses out of 10**

8-10: Culture by Design	Your firm has intentional practices across all five elements. Focus on reinforcing what works and documenting systems so they scale.
5-7: Partial Design	You have strength in some areas but gaps in others. Identify the lowest-scoring category and prioritize improvement there first.
2-4: Culture by Default	Most of your culture emerged without intention. Start with communication rhythms as the foundation for other improvements.
0-1: Urgent Attention Needed	Culture gaps are likely affecting retention and performance now. Consider external support to accelerate change.

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