

B L A C K F O X S T R A T E G Y

---

# THE PGEE STRATEGY HEALTH CHECK

*A Self-Assessment for  
CEOs and Executive Directors*

---

See what's working. Find what's missing.  
Know where to focus next.

**Erin Sedor**

Executive Advisor & Strategic Performance Expert

[ErinSedor.com](http://ErinSedor.com)

*New Science. Ancient Wisdom. Better Business.*



## Why This Matters

Most strategic plans fail. You know this. The 90% failure rate reported by Kaplan and Norton at Harvard Business School has been a stubborn fixture for decades, and the reasons given haven't changed much either—poor communication, weak metrics, failure to connect strategy to operations.

But here's what I've learned in thirty-plus years of working inside organizations of every size, type, and complexity: the execution problems everyone points to are usually symptoms. The root cause sits upstream, in how strategy is designed in the first place.

The Essential Strategy Formula is built on a simple premise. Every organization—regardless of what it does, where it operates, or who it serves—needs three things to succeed long-term: Purpose that is internally compelling and externally valuable. Growth that is intentional and matched by the internal capacity to sustain it. And Evolution that actively anticipates change rather than reacting to it. These three elements, held in dynamic Equilibrium, form the PGEE foundation.

This self-assessment is designed to help you see your organization through that lens. Not to tell you what to do—you and your team are the experts on your organization. But to surface the patterns, gaps, and imbalances that traditional planning processes tend to miss.

*The score is not the end goal. It's perspective. What you can see, you can address. What you can't, runs the show without your permission.*

Answer honestly. There's no grade here—only clarity.

---

## How to Use This Assessment

For each section, you'll find a set of diagnostic statements. Rate each one on a scale of 1 to 5, where 1 means you strongly disagree and 5 means you strongly agree. Don't overthink it—your first instinct is usually the most honest one.

After the diagnostic statements, you'll find reflection questions. These are where the real work happens. The rating scale tells you where you are. The reflection questions start to tell you why.

At the end, you'll tally your scores across all four dimensions and look for the patterns—which pillars are strong, which are underdeveloped, and where the imbalance is pulling your strategy off course.



**A note on honesty:** This assessment is only as useful as you are truthful. The most common mistake leaders make in self-assessment is answering based on what they intend or aspire to rather than what actually exists today. Rate the current state. Aspiration is important—but it's not the same as reality, and confusing the two is how blind spots form.

---

## Before You Start

Before you dive in, write down in the space below a few bullet points on why you are here. What is your gut telling you? What are you trying to solve?



## Purpose

*The Essential Strategy Rule: Purpose is internally compelling and externally valuable in its contribution.*

Purpose is not your mission statement. It’s not a tagline on a wall or a page in your strategic plan. Purpose is the lived experience of why this organization exists—felt by the people inside it and recognized by those it serves. When purpose is authentic and actively cultivated, it becomes the gravitational center that holds strategy together. When it’s hollow, everything downstream drifts.

This section examines both dimensions: how compelling your purpose is internally—to the people doing the work—and how valuable it is externally—to those you serve and the broader ecosystem you operate in.

### Diagnostic Statements

	1	2	3	4	5
	Disagree			Agree	
Our employees can articulate why this organization exists in their own words—beyond what we sell or deliver.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a visible connection between our stated purpose and the day-to-day experience of working here.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our leadership team is authentically aligned around a shared cause—not just shared goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The value we create for those we serve is distinctive—not easily replicated by a competitor.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New hires understand within their first 90 days not just what we do, but why it matters.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our purpose actively informs strategic decisions—it’s a filter, not a footnote.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



## Reading Your Purpose Score

**25–30:** Purpose is a genuine strategic asset. The cause is alive inside the organization. Protect it—this is rare.

**18–24:** Purpose exists but may be unevenly felt. Leadership likely connects to it; the question is whether the rest of the organization does.

**12–17:** Purpose is stated but not lived. There's a gap between what's on the wall and what people experience. This gap costs more than most leaders realize.

**6–11:** Purpose is either unclear or disconnected from organizational reality. Strategy built on this foundation will struggle to hold.

## Reflect

*If you removed your organization's name from its mission statement, would anyone be able to tell it apart from your competitors'?*

*When was the last time your leadership team had a candid conversation about whether purpose is actually felt across the organization—or just stated?*

*What would change in your strategy if internal thriving were treated as a top-tier strategic priority rather than an HR initiative?*

Jot down your thoughts below.



## Growth

*The Essential Strategy Rule: Growth is intentional, matched by adaptive learning and expansion of capabilities to sustain both speed and scale.*

Growth is the pillar most organizations fixate on—and the one they most consistently get wrong. Not because they fail to grow, but because they define growth almost exclusively in external terms: revenue, market share, geographic reach, headcount. These are outcomes. They tell you what happened. They don’t tell you whether the organization can sustain it.

The most devastating strategic mistake I’ve witnessed—across industries, across decades—is leadership that lets external growth outpace internal readiness. It happens all the time. And it’s almost always invisible until something breaks.

This section assesses both the external ambition and the internal muscle. How intentionally is your organization growing? And does your internal capacity—your people, systems, culture, and learning infrastructure—match the pace of what you’re asking of them?

### Diagnostic Statements

	1	2	3	4	5
	Disagree				Agree
Our growth strategy explicitly accounts for the internal capacity needed to sustain it—not just the revenue targets.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We invest in developing our people’s capabilities as deliberately as we invest in market expansion.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When we take on new initiatives, we honestly assess whether we have the infrastructure and talent to support them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our organization learns from both successes and failures in a structured way—not just anecdotally.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have said no to growth opportunities because the internal cost of pursuing them was too high.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our leadership team can clearly articulate where we need to build internal capability before we can grow further.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



## Reading Your Growth Score

**25–30:** Growth is intentional and balanced. Your organization is building the muscle to match the ambition. This is a strategic advantage.

**18–24:** Growth is happening, but internal investment may be trailing. Watch for early signs of strain—the gap tends to widen before it becomes visible.

**12–17:** External growth is outpacing internal readiness. The organization is likely running on adrenaline rather than sustainable capacity. This is where breakdowns begin.

**6–11:** Growth is either stalled or reckless. Either the organization isn't growing, or it's growing without the foundation to hold it. Both are strategic emergencies.

## Reflect

*Think about your most recent strategic initiative. Was internal readiness assessed with the same rigor as the market opportunity—or was it assumed?*

*Where is your organization growing faster than your people's ability to keep up? What's the cost of that gap—in turnover, quality, or burnout?*

*If you paused all external growth for six months and invested entirely in internal capacity, what would you build?*

Jot down your thoughts below.



## Evolution

*The Essential Strategy Rule: Evolution actively anticipates the changing needs and wants of all those who serve and who are served by the organization.*

Evolution is the most consistently overlooked dimension in strategy design. It shows up in every SWOT analysis and competitive landscape review, but it almost never makes it into strategic priorities. There’s a dangerous assumption that evolution belongs on a future planning horizon—that it’s something to think about later, once the current plan is executed.

It isn’t. Evolution is about the decisions you make now that determine whether you’ll still be relevant when the future arrives. And it applies both externally—how your market, industry, and customers are changing—and internally—how your people, culture, and organization must change to meet those shifts.

This section looks at how actively your organization is anticipating and preparing for change, rather than merely reacting to it when it arrives.

### Diagnostic Statements

	1	2	3	4	5
	Disagree				Agree
Our strategic plan includes specific priorities tied to how we must evolve—not just what we must achieve.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We actively monitor shifts in our industry, customer needs, and competitive landscape as a strategic discipline—not a periodic exercise.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our organization has changed something meaningful about how it operates in the last twelve months—proactively, not in response to a crisis.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We invest in understanding how our people and culture need to evolve alongside the business—not just how the market is shifting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When resistance to change surfaces, our leadership treats it as a signal worth understanding—not a problem to overcome.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our leadership team regularly asks: what must be different about us in three years, and what are we doing about it now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>





## Reading Your Evolution Score

**25–30:** Your organization is anticipating rather than reacting. This is the foundation of long-term relevance and resilience.

**18–24:** Evolution awareness exists, but it may live at the leadership level without being embedded in strategy. The thinking is there; the action may lag.

**12–17:** Evolution is an afterthought—acknowledged in conversation but absent from priorities. The organization is likely more reactive than it realizes.

**6–11:** Change is something that happens to this organization rather than something it drives. This creates strategic fragility that compounds over time.

### Reflect

*What is your organization assuming won't change in the next three years? How confident are you in that assumption?*

*When was the last time your organization made a significant internal change because it anticipated a shift—rather than because it was forced to react?*

*How would your people describe the organization's relationship with change? Is it something that happens to them, or something they participate in shaping?*

Jot down your thoughts below.



## Equilibrium

*The Essential Strategy Rule: Purpose, Growth, and Evolution are interconnected and exist in a state of dynamic Equilibrium.*

Equilibrium isn't balance in the static sense—it's not about giving equal weight to everything. It's a decision-making discipline. When a new opportunity surfaces, when a crisis hits, when resources are tight, the Equilibrium lens asks: does this maintain productive tension across Purpose, Growth, and Evolution—or does it throw us out of alignment?

This is the dimension that makes the first three work together. Without it, organizations default to whichever pillar feels most urgent—usually Growth—and the others atrophy. Equilibrium is the mechanism that prevents one dimension from consuming all the oxygen.

This section assesses whether your organization makes strategic decisions with this kind of integrated awareness, or whether priorities are set in silos and imbalances go unexamined.

### Diagnostic Statements

	1	2	3	4	5
	Disagree				Agree
When we evaluate new opportunities, we consider impact across purpose, internal capacity, and long-term relevance—not just financial return.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our leadership team recognizes when one strategic priority is consuming resources at the expense of others—and adjusts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic decisions are informed by a holistic view of the organization—not driven by the loudest voice or most urgent crisis.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a mechanism for revisiting and rebalancing strategic priorities during the planning cycle—not just at annual planning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our organization's current strategic plan addresses internal thriving with the same seriousness as external performance targets.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
When something isn't working, we look at the system—not just the initiative—to understand why.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



## Reading Your Equilibrium Score

**25–30:** Your organization makes decisions with integrated awareness. This is the discipline that keeps strategy alive and adaptive.

**18–24:** The awareness is there, but the discipline may be inconsistent. Equilibrium likely breaks down under pressure—when urgency overrides intention.

**12–17:** Strategic decisions are made in silos or driven by whichever priority feels most pressing. Imbalances are accumulating.

**6–11:** There is no integrating mechanism across strategic priorities. The plan may look comprehensive on paper, but the lived reality is fragmented.

### Reflect

*Which pillar—Purpose, Growth, or Evolution—is getting the most strategic attention right now? Which is getting the least? What’s driving that imbalance?*

*When was the last time your leadership team made a strategic decision that intentionally sacrificed short-term growth to protect purpose or invest in evolution?*

*If you looked at where your organization’s time, energy, and budget actually go—not where the plan says they should—what would the real priorities reveal?*

Jot down your thoughts below.



## Your Results: Reading the Patterns

Transfer your section scores below. The individual scores matter, but the pattern across all four dimensions tells the real story.

Dimension	Your Score	Range
Purpose	/30	6 – 30
Growth	/30	6 – 30
Evolution	/30	6 – 30
Equilibrium	/30	6 – 30

### What the Patterns Reveal

Individual dimension scores tell you about the health of each pillar. But the relationship between scores is where the strategic intelligence lives. Here are the most common patterns and what they mean.

**High Growth, Low Purpose.** This is the most common imbalance in high-performing organizations—and the most dangerous. Growth is consuming all the oxygen. Revenue is up. Expansion is happening. But the people inside are disconnected from why any of it matters. This pattern produces turnover that looks like a talent problem but is actually a meaning problem. Employees leave because the cause isn't compelling enough to justify the pace.

**High Purpose, Low Growth.** Common in mission-driven organizations—non-profits, social enterprises, and purpose-led companies. The cause is clear and deeply felt, but the organization is underinvesting in the capacity to deliver on it. Purpose without growth becomes passion without impact. The mission stays beautiful and the execution stays small.

**Low Evolution Across the Board.** This is the pattern of organizations that will be blindsided. Purpose may be strong. Growth may be humming. But nobody is asking what needs to be different in three years. The assumption—usually unspoken—is that the current model will keep working. It rarely does. Low Evolution scores are a leading indicator of relevance risk.

**Low Equilibrium with Mixed Dimension Scores.** This tells you the organization has strengths in individual pillars but no integrating mechanism. Decisions are made in isolation. Growth initiatives aren't tested against purpose. Evolution priorities aren't resourced because growth consumed the budget. The plan looks comprehensive. The lived reality is fragmented.



**Consistently Mid-Range Scores (15–20 across all dimensions).** This is the most deceptive pattern. Nothing looks broken. But nothing is truly strong, either. Organizations in this range tend to feel stuck—competent but not thriving. The risk is complacency. The opportunity is that relatively small, focused investments in any one dimension can shift the entire system.

*Strategy doesn't fail in one dramatic moment. It fails in the accumulation of imbalances that nobody named.*

---

## The Risk Appetite Connection

If this assessment surfaced imbalances you hadn't named before, there's a companion question worth sitting with: how much risk are you actually willing to take—and have you ever defined it?

Most organizations either skip risk appetite entirely or treat it as a compliance exercise. That's a strategic vulnerability hiding in plain sight. Without defined boundaries, organizations gradually accept incremental increases in exposure—each decision rational in isolation, but the cumulative effect quietly overshoots every limit that was never set.

The Essential Strategy Risk Appetite Framework ties risk appetite directly to the PGEE foundation through four questions:

**For Purpose:** How much do we invest before the cost is too great?

**For Growth:** How fast can we get there without sacrificing existing value?

**For Evolution:** To what extent are we willing to change?

**For Equilibrium:** What threats have the potential to disrupt the mission-critical path?

These aren't abstract risk categories. They're the boundaries that protect what matters most about your strategy. And they're defined in language your leadership team already uses—because they're anchored to the same PGEE priorities that should be driving every strategic decision.

If you've never had this conversation as a leadership team, the patterns you uncovered in this assessment are the place to start.



## What's Next

You now have something most organizations never develop: an honest picture of where your strategy's foundation is strong and where it's exposed. That awareness alone changes how you lead. Take your notes – they will help guide your next conversations.

Here's what you can do with it:

**Name the imbalance.** Share your findings with your leadership team. Not as a judgment—as a conversation starter. The patterns this assessment reveals are rarely a surprise to the people living inside the organization. They've felt it. They just haven't had language for it.

**Pick one dimension.** You don't fix everything at once. Identify the pillar that's most underserved relative to the others and ask: what would it take to move this score by five points in the next six months? That's your highest-leverage strategic investment.

**Revisit the Equilibrium question.** Every strategic decision you make from here forward can be tested through the PGEE lens. Does this serve our purpose? Does our capacity match our ambition? Are we evolving to meet what's coming? Is this in balance with the rest of our priorities? Four questions. One discipline. It changes everything.

---

*If this assessment confirmed what you've been sensing—or revealed something you hadn't seen—and you want to go deeper, that's exactly what the Essential Strategy process is built for. The Strategic Health Check gives you sight. The full PGEE framework gives you a system for acting on what you see.*

*Reach out at [erin@erinsedor.com](mailto:erin@erinsedor.com) or visit [ErinSedor.com](https://ErinSedor.com). Let's talk about what's possible.*

---

*Erin Sedor is a CEO Strategy Coach and executive advisor with 30+ years helping organizations build strategy that actually works. She is the creator of Essential Strategy, the ESQI 360, and the Quantum Intelligence framework for conscious, adaptive leadership.*

