Structural & Organizational Capital Self-Assessment

Be honest with yourself! There are no right or wrong responses. This questionnaire is for your own reflection and is yours to keep.

	Part A - Structural Capital The codified knowledge, processes, systems, and intellectual property that exist independently of any individual person.	1 Strongly disagree / Not in place	2 Mostly disagree / Early Stages	3 Neutral / Partially in place	4 Mostly agree / Well established	5 Strongly agree / Fully embedded
	Points	1	2	3	4	5
A.1	Our top revenue-generating processes are fully documented, up to date, and accessible to the right people, without needing to ask a specific individual.					
A.2	Our business could operate effectively for at least 30 days if our top three people were simultaneously unavailable, without significant disruption to clients or revenue.					
A.3	Our institutional knowledge (how we do what we do) is primarily captured in systems, documents, and tools, rather than living in the heads of specific individuals.					
A.4	We have formal protections in place (legal agreements, registered IP, or documented trade secrets) for our most valuable proprietary knowledge and methods.					
A.5	Our current technology systems could support three times our current volume of work without requiring a complete rebuild or replacement.					
	SUBTOTAL					

	Points	1	2	3	4	5
	Part B - Organizational Capital The values, culture, decision-making structures, and operating norms that shape how the business behaves as a system.	Strongly disagree / Not in place	Mostly disagree / Early Stages	Neutral / Partially in place	Mostly agree / Well established	Strongly agree / Fully embedded
B.1	Every major category of decision in our business has a clearly defined owner. People at all levels know who decides what, and they rarely need to escalate unnecessarily.					
B.2	Our organizational culture has been intentionally defined and documented. It is actively embedded in how we hire, onboard, recognize, and manage performance, not just stated on a wall or website.					
B.3	We operate on a consistent planning and review cadence (annual strategy, quarterly reviews, and regular leadership check-ins) and this rhythm drives real decisions and accountability.					
B.4	Our organization can absorb and integrate significant change (new strategy, new systems, new people) without requiring leadership-level intervention at every step of the process.					
B.5	We track and review organizational performance metrics beyond revenue and profit, including operational health, team effectiveness, and strategic execution indicators.					
	SUBTOTAL					
	TOTAL					

What Your Score Means

Score	Stage	What it suggests
10 - 25	Foundation	Significant exposure to key-person risk, scalability limits, and valuation discounts. Building internal capital should be a strategic priority — ideally before the next growth, transition, or exit event.
26 – 39	Building	Some systems and structures are in place, but meaningful gaps remain. Identify your 2–3 lowest-scoring areas and address them in sequence.
40 – 50	Compounding	Strong internal capital foundation. Focus shifts to protecting and continuously improving what exists — and to building Human Capital (covered next month).