

The BUILD Organizational Health Assessment™

Great organizations are not an accident. They are built.

WHY THIS WORK MATTERS

\$10T is changing hands.

Privately held U.S. business assets are transitioning over the next decade.* Whether you hold, grow, or sell, organizational health is what impacts value and carries it forward.

Work is changing.

Markets, technology, and workforce expectations are shifting faster than ever. Organizations, and the people who run them, must adapt on purpose, not by accident.

People compound.

Equipment depreciates and software gets replaced. Only people compound. The health of the organization is the return on your greatest asset.

Design beats default.

Every company has a culture and a way of operating. Few have chosen them. You can't be purposeful about what you haven't measured.

WHAT IT IS

A structured diagnostic that looks at the whole business, not just the P&L. With input from owners, leaders, and team members, it delivers a true snapshot across all 13 areas of organizational health, making it the cornerstone for any work a company takes on. Different than an employee engagement survey, which measures how team members connect with their work; the BUILD Organizational Health Assessment measures how the whole business is performing. Because you cannot build what you cannot see.

THE 13 AREAS OF ORGANIZATIONAL HEALTH

01 Culture

02 Strategy

03 Leadership

04 Talent Attraction, Engagement & Retention

05 People Asset Development

06 Succession & Bench Strength

07 Communication

08 Financial Health

09 Productivity & Efficiency

10 Customer Experience

11 Critical Thinking & Decision Making

12 Innovation

13 Speed & Agility to Change

* Sources: McKinsey Institute for Economic Mobility (2026); Headway Business Advisors (2025); U.S. Census of Business Owners.

What you can expect to see.

The assessment turns impressions into focus, and focus into results.

● A clear baseline

An honest, organization-wide read on each of the 13 areas: where the business is strong, where it is strained, and where leaders see it differently than the team does.

● Strengths & gaps, named

Specific, plain-language findings instead of vague impressions. You will know which areas are fueling performance and which are quietly costing you time, talent, and value.

● Leadership alignment

A shared picture the whole leadership team can rally around, replacing competing opinions with common language and agreed-upon facts.

● High-impact focus areas

Not 13 projects at once. The results identify the high-impact focus areas where concentrated effort will produce the greatest return, so improvement starts where it matters most.

FROM ASSESSMENT TO RESULTS-BASED OUTCOMES

The assessment is not the end goal. Results are. Together, we use the findings to determine the high-impact focus areas for your business, then work on them side by side, directing your time, energy, and resources toward outcomes you can measure:

1 ASSESS

BUILD Organizational Health Assessment™

Measure all 13 areas to establish the baseline and surface the real constraints, not just the loudest symptoms.



2 FOCUS TOGETHER

BUILD Report & Plan

Together, we determine the two or three high-impact focus areas. Some you will work on with your team and us; others with trusted partners positioned to drive the best results.



3 GET RESULTS

BUILD Progress & Results

We work on those areas together, with practices, owners, and a rhythm of follow-through that turns effort into measurable outcomes.

Then we measure again. Progress is tracked against your baseline, so you see results, not just activity. Organizational health is a discipline, not an event.

Build your next chapter by design, not by default.

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