



Workplace Culture Assessment Checklist 2026

Pre-Assessment Planning & Strategy

Define the scope, objectives, and key stakeholders involved in the culture audit.

Assessment Objective

Write something...

Assessment Start Date

Enter date...

Stakeholder Groups to Include

- ☐ Executive Leadership
- ☐ Department Managers
- ☐ Frontline Employees
- ☐ Human Resources Team
- ☐ External Consultants

Assessment Scope

- ☐ Company-wide
- ☐ Department Specific
- ☐ Regional/Branch Specific

Definition of Success Metrics

Write something...

Project Charter/Scope Document

 Upload File

Methodology & Data Collection Tools

Selection of survey instruments, focus group frameworks, and feedback channels.

Primary Data Collection Method

- ☐ Quantitative Surveys
- ☐ Qualitative Interviews
- ☐ Focus Groups
- ☐ Observation & Audit

Tools to be Utilized

- ☐ SurveyMonkey / Typeform
- ☐ Google Forms
- ☐ Internal HRIS Modules
- ☐ One-on-One Interview Scripts
- ☐ Sentiment Analysis Software

Data Collection Start Date

Enter date...

Data Collection Deadline

Enter date...

Survey Sample Size Description

Write something...

Upload Survey Instrument / Questionnaire Template

 Upload File

Core Values & Mission Alignment

Evaluating how effectively organizational values are communicated and lived by employees.

Alignment Score

- ☐ Strongly Aligned
- ☐ Moderately Aligned
- ☐ Neutral
- ☐ Misaligned
- ☐ Highly Misaligned

Observed Core Values in Daily Operations

- ☐ Integrity
- ☐ Innovation
- ☐ Customer Obsession
- ☐ Collaboration
- ☐ Agility
- ☐ Accountability

Evidence of Mission Alignment

Write something...

Identified Value Gaps

Write something...

Supporting Documentation

 Upload File

Leadership & Management Effectiveness

Assessing communication transparency, trust in leadership, and management accessibility.

Manager Communication Frequency

- ☐ Daily
- ☐ Weekly
- ☐ Bi-weekly
- ☐ Monthly
- ☐ Rarely/Never

Observed Positive Leadership Traits

- ☐ Transparency
- ☐ Approachability
- ☐ Decisiveness
- ☐ Empathy
- ☐ Accountability

Manager Availability Score (1-10)

Enter a number...

Feedback on Management Support

Write something...

Last Leadership Review Date

Enter date...

Employee Engagement & Morale

Measuring levels of motivation, job satisfaction, and sense of belonging within teams.

Overall Employee Satisfaction Level

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

Primary Drivers of Motivation

- ☐ Compensation & Benefits
- ☐ Career Advancement Opportunities
- ☐ Work-Life Balance
- ☐ Team Collaboration
- ☐ Recognition & Feedback
- ☐ Company Purpose & Mission

Employee Net Promoter Score (eNPS) Equivalent

Enter a number...

Key Factors Impacting Morale

Write something...

Department/Team Name

Write something...

Diversity, Equity, and Inclusion (DEI) Audit

Reviewing the inclusivity of workplace practices and the presence of psychological safety.

Diversity Dimensions Audited

- ☐ Gender Identity
- ☐ Race & Ethnicity
- ☐ Age/Generational Diversity
- ☐ Physical/Neurodiversity
- ☐ Socioeconomic Background

Representation Percentage

Enter a number...

Identified Bias or Barrier Observations

Write something...

Inclusion Sentiment Score

- ☐ Very High
- ☐ High
- ☐ Moderate
- ☐ Low
- ☐ Critical Concern

Supporting Demographic Reports

 Upload File

HR Auditor Verification

Communication & Information Flow

Analyzing the efficiency of internal communication channels and information transparency.

Primary Communication Channels Used

- ☐ Email
- ☐ Slack/Microsoft Teams
- ☐ Company Intranet
- ☐ All-Hands Meetings
- ☐ Town Hall Sessions
- ☐ Project Management Tools (Jira/Asana)

Communication Transparency Rating

- ☐ Very Transparent
- ☐ Moderately Transparent
- ☐ Opaque/Lack of Information
- ☐ Not Applicable

Identified Communication Gaps

Write something...

Average Response Time to Internal Inquiries (Hours)

Enter a number...

Internal Communication Policy Document

 Upload File

Recognition & Reward Systems

Evaluating the effectiveness of current employee appreciation and incentive programs.

Current Recognition Methods in Use

- ☐ Peer-to-Peer Recognition
- ☐ Monetary Bonuses
- ☐ Service Anniversary Awards
- ☐ Public Shout-outs/Announcements
- ☐ Gift Cards/Vouchers
- ☐ Professional Development Opportunities

Effectiveness of Existing Reward Programs

Write something...

Frequency of Recognition Evaluation

- ☐ Monthly
- ☐ Quarterly
- ☐ Bi-Annually
- ☐ Annually

Estimated Annual Budget for Recognition Programs

Enter a number...

Identified Gaps in Current Reward Strategy

Write something...

Current Reward Policy Documentation

 Upload File

Data Analysis & Sentiment Synthesis

Processing survey results, identifying qualitative themes, and quantifying cultural metrics.

Analysis Completion Date

Enter date...

Total Survey Response Rate (%)

Enter a number...

Identified Cultural Themes

- ☐ Communication Gaps
- ☐ Leadership Trust Issues
- ☐ Recognition Deficit
- ☐ Work-Life Balance Concerns
- ☐ High Team Collaboration

Executive Summary of Findings

Write something...

Raw Data Report/Spreadsheet

 Upload File

HR Lead Approval

Action Planning & Communication Rollout

Developing strategic interventions and communicating findings and next steps to the organization.

Primary Cultural Improvement Objective

Write something...

Detailed Action Plan Description

Write something...

Implementation Deadline

Enter date...

Target Audience for Communication

- ☐ All Employees
- ☐ Department Heads
- ☐ Executive Leadership
- ☐ Middle Management
- ☐ Remote/Hybrid Teams

Communication Channel

- ☐ Company-wide Town Hall
- ☐ Email Announcement
- ☐ Intranet/Internal Newsletter
- ☐ Manager 1-on-1s

Finalized Strategy Document

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HR Director Approval

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🏁 Finish

🔗 Generate Sample Report