

The Business Assessment

The way we do business and finance is changing

For each statement below, rank your business on a scale of 1 to 5 where 1 is weak and 5 is strong.

We have a working plan for personal development of our mind body and spirit and it is shared and encouraged with team members.

1 2 3 4 5

We have a health and nutrition program for ourselves and it is shared and encouraged with team members.

1 2 3 4 5

We have a system that is clear to our team members of the benefits of working with our company.

1 2 3 4 5

We have a business growth specialist for advice and to help scale our business.

1 2 3 4 5

We work closely with our bank and financial professional to set financial goals.

1 2 3 4 5

We have a Lawyer for legal action and advice.

1 2 3 4 5

We have an accountant and we are filing our taxes on or before dew date.

1 2 3 4 5

We have a clear Vision in writing that has been properly communicated and is shared by everyone in the company. *

1 2 3 4 5

Our Core values are clear, and we are hiring, reviewing, rewarding, and firing around them.

1 2 3 4 5

Our core focus is clear, and we keep our people, systems and processes aligned and focused on it. *

1 2 3 4 5

Our 10-Year Target (big, long-range business goal) is clear, communicated regularly, and is shared by all. *

1 2 3 4 5

Our target market (definition of our ideal client) is clear, and all our sales and marketing efforts are focused on it. *

1 2 3 4 5

Our 3 Unique differentiators are clear, and all of our sales and marketing efforts communicate them. *

1 2 3 4 5

We have a proven process for doing business with our core customers. It has been named and visually illustrated, and all our sales people use it. *

1 2 3 4 5

All of the people in our organisation are the "right people"(they fit our culture and share our core values.) *

1 2 3 4 5

Our Accountability Chart (organisational chart of roles and responsibilities) is clear, complete, and constantly updated. *

1 2 3 4 5

Everyone is in the right seat. They have the technical skills and time capacity to do the job. *

1 2 3 4 5

Our leadership team is open and honest, and demonstrates a high level of trust. *

1 2 3 4 5

Everyone has Rocks (1-7 priorities per quarter)and is focused on them. *

1 2 3 4 5

Everyone is engaged in regular weekly meetings. *

1 2 3 4 5

All meetings are on the same day and at the same time each week, have the same agenda, start on time, and end on time. *

1 2 3 4 5

All teams clearly identify, discuss, and solve key issues for the long term and greater good of the company. *

1 2 3 4 5

Our Core Processes are documented, simplified, and followed by all to consistently produce the results we want. *

1 2 3 4 5

We have a system for receiving regular customer and employee feedback, and we know their level of satisfaction. *

1 2 3 4 5

A Scorecard for tracking weekly metrics/measurable is in Place. *

1 2 3 4 5

Everyone in the organisation has at least one number they are accountable for keeping on track each week. *

1 2 3 4 5

We have a budget and are monitoring it regularly (e.g., monthly or quarterly) *

1 2 3 4 5