

Numbers

- | | <u>YES</u> | <u>NO</u> |
|--|--------------------------|--------------------------|
| 1. Do you have a system for reporting, gathering, and sending documents to your accountant to make sure your financial statement can be completed accurately and timely? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you receive a monthly financial statement and do you understand how to read your financial statements? Meaning; you understand why sales, profitability and cash flow are up/down by looking at your financial statement and what key line items are causing any fluctuations, positively or negatively? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you know your break-even point and have you built profit into your break-even to understand what your sales need to be profitable, pay yourself first and make sure you get paid every pay period/month? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Do you have key bench marks/KPI's for (to hit your sales, profitability and cash flow goals): | | |
| Your current number of accounts or customers? | <input type="checkbox"/> | <input type="checkbox"/> |
| The number of transactions daily/weekly/monthly? | <input type="checkbox"/> | <input type="checkbox"/> |
| Your average transaction/purchase size by customers, each visit or annually? | <input type="checkbox"/> | <input type="checkbox"/> |
| For your Cost of Goods Sold and Gross Profit? | <input type="checkbox"/> | <input type="checkbox"/> |
| Your overhead/operating expenses? | <input type="checkbox"/> | <input type="checkbox"/> |
| A/R collection days and inventory days? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Do you operate according to a budget? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Know the cost of acquiring a new customer and the lifetime value of a customer? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Do you use a 6-12 week cash flow forecast in your business? | <input type="checkbox"/> | <input type="checkbox"/> |

List the top 3 items you want to focus on (by priority) to improve, learn about, or implement

1. _____
2. _____
3. _____

People

	<u>YES</u>	<u>NO</u>
1. Do you have an organizational chart that outlines the roles, and positions your people will fill?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have job descriptions, responsibilities and outcomes written for your people?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do your people know your vision and strategic objectives? And why they are important for the company?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you communicate your core values, rules to the game and what's most important to you? Do you or your team communicate this during the hiring process and reinforce it as the team works together?	<input type="checkbox"/>	<input type="checkbox"/>
5. Knowing what you know today, would you enthusiastically rehire everyone on your team?	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you have a DISC and Motivators job benchmarks for your key roles and use it in your hiring process?	<input type="checkbox"/>	<input type="checkbox"/>
7. Have you identified your ideal customer and do you have a marketing plan in place to communicate electronically (website), in print, and verbally, to generate interest in your product/service? Does it exhibit a sense of excitement about the possibility of doing business with you making them <i>want</i> to do business with you?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you have customer service and delivery systems your internal people can follow to ensure exceptional delivery of your product/service, to meet and exceed the customer's expectations?	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have a sales process to generate leads, and to convert those leads into sales consistently? Is it documented so new team members can be trained on it, and is it repeatable from one salesperson to the next?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you know the DISC profiles for your team, and does your team know each other's DISC profile(s) to help foster high performance communication? Do you and your team have the communication skills to adapt your communication style to match the communication that is needed for that individual?	<input type="checkbox"/>	<input type="checkbox"/>
11. Are your managers and leaders equipped with the leadership skills they need to be successful in their roles?	<input type="checkbox"/>	<input type="checkbox"/>
12. Does your management/leadership team have management systems and KPI benchmarks in place to coach and support those they lead, and for their department/company?	<input type="checkbox"/>	<input type="checkbox"/>

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Self

	<u>YES</u>	<u>NO</u>
1. Am I an “A” player with how I show up? (If you want to work with “A” players you must be an “A” player)	<input type="checkbox"/>	<input type="checkbox"/>
2. Are you a walking example of your culture and values, instilling in the staff what you expect of them?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you consistently think about how you can improve yourself and be a better leader?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you continually read and learn new information that helps you grow, become a better person, innovator, which adds value and improves the way I do and think about things?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you continuously expand, learn, practice and seek out ways to be a better leader and acquire the skillsets of leadership. Learning not only what leaders do, but how they do it in the areas of communication, time management, motivating people, creating a vision, communicating that vision, inspiring others, coaching others, delegating, etc.	<input type="checkbox"/>	<input type="checkbox"/>
6. What are you most passionate about being: the technician , the artist , the talent , the manager or the entrepreneur (circle answer)?		
7. I have a budget for my personal finances, so my personal finances do not cash strap or drain the business of the capital it needs	<input type="checkbox"/>	<input type="checkbox"/>
8. I have an executable, concrete vision for my business? Meaning; my vision has gone beyond the initial concept or idea, and defines how I am going to execute this vision and build a team, delivery method, sales and marketing process, and profitable organization around it.	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have daily practices and rituals to take care of yourself, physically and emotionally?	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you have written personal goals?	<input type="checkbox"/>	<input type="checkbox"/>
11. Do you schedule time to work on your business, not in it?	<input type="checkbox"/>	<input type="checkbox"/>
12. Do you have a way to manage, prioritize and guide your actions daily, weekly, monthly, yearly, to help you achieve and accelerate your goals and key results necessary to achieve your vision?	<input type="checkbox"/>	<input type="checkbox"/>
13. I stop and celebrate my success and results, milestones, and reward myself and my team for our wins, big or small.	<input type="checkbox"/>	<input type="checkbox"/>

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System of Support

(Have and Know Your Business Model)

	<u>YES</u>	<u>NO</u>
1. Organizational Chart	<input type="checkbox"/>	<input type="checkbox"/>
2. Financial structure and model for how the business will be profitable and cash flow. <small>(Gross Profit Margin Percentage, Operating Expense, Sales and Marketing Costs, A/R Day, Inventory Days, A/P Days)</small>	<input type="checkbox"/>	<input type="checkbox"/>
3. System for delivering product or service - fulfilling need, job, etc. and providing a great customer experience.	<input type="checkbox"/>	<input type="checkbox"/>
4. Sales and Marketing process and model that ensures if invest \$X dollars, your ROI return is greater than the costs to bring in that dollar of revenue. Meaning you also understand the acquisition cost of a customer and the lifetime value of that customer.	<input type="checkbox"/>	<input type="checkbox"/>
5. You have values and rules to the game that you communicate to your new hires starting in the interview process and guides them in how they interact, communicate and treat each other every day, how they play in the sandbox together, and that sets the tone for the standards of the company and what is expected of them and their role.	<input type="checkbox"/>	<input type="checkbox"/>
Additionally I have a training program in place to help, support, coach and provide employees with feedback so they can go from being an enthusiastic beginner on day one to a self-reliant achiever. Which, is based on an appropriate timeline required for their role.	<input type="checkbox"/>	<input type="checkbox"/>

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90 Day Action Plan

List the 5 top items based on your **Numbers, People, Self** and **System of Support** assessment, that is most important for you to have in place for your business in the next 90 days.

1. _____
2. _____
3. _____
4. _____
5. _____



Notes