

We Run Together Business Self Evaluation

NAME:	COMPANY NAME:	
TITLE:	NUMBER OF EMPLOYEES (CURRENT)	(LAST YEAR)

The following questionnaire has been designed to help you rate your business in various key areas. Rate each statement for where your business stands today, using the dropdown lists: 1 (strongly disagree) to 10 (strongly agree). When complete, email to tony@BlockhouseOne.com and we will prepare your report and review the results with you.

STRATEGIC PLANNING

1. We have company Vision, Mission, and Values statements that guide our planning and decision- making process.

2. We conduct a SWOTT analysis (Strengths, Weaknesses, Opportunities, Threats, Trends) on our business annually (as a minimum) and/or as required.

3. We break our strategies down into specific actions/tactics that are assigned owners, deadlines, resources required, etc.

4. We measure progress on a regular basis and hold responsible parties accountable to fulfill actions/tasks.

MARKETING

1. We use the 4 Ps (Product, Price, Place, Promotion) of marketing to develop our marketing plan.

2. We have clearly defined our target market and our ideal client (ex.: using demographics, geographics, and psychographics).

3. We have a very unique competitive advantage in our industry and communicate this Unique Selling Proposition through our messaging

4. We track the ROI on all of our marketing tactics

SALES

1. We have a specific sales model (process) with clearly defined objectives of each step in the model

2. Our sales questioning methodology discovers and quantifies the pains that our prospects want to eliminate and/or the pleasures they want to increase.

3. Our salespeople regularly prospect and receive referrals in order to keep the sales pipeline full with well-qualified opportunities.

4. We track and then re-sell/cross-sell to aging or lost buyers.

5. We have identified and are actively contacting our list of top-20 qualified prospects/ ideal client pools.

CLIENT EXPERIENCE

1. Our client experience always meets or exceeds our clients’ expectations.

2. We have a consistent process for delivering our client experience so nothing is left to chance.

3. We have a formal client appreciation and/or follow up program designed to enhance our clients’ experience with us.

4. We survey our clients regularly to determine how we are performing.

5. Based on our clients’ feedback, we constantly assess and improve our systems and products/services.

HUMAN RESOURCES

1. New hires are effectively onboarded in a systemized process and all staff members are provided with ongoing training/cross-training.

2. Our employees are highly motivated and love coming to work and we understand how to recognize and appreciate their achievements and contributions. They feel they can speak their truth.

3. I’m confident and review regularly our benefits and compensation plans to ensure they are fair and competitive and develop motivated and engaged employees.

Run Business Effectiveness Evaluation

BUSINESS SYSTEMS

1.

As the owner of the business, I fully understand that my primary role is to ensure that the business is run by systems (step-by-step processes).
2.

All of the functions necessary to successfully run our company have been clearly identified and documented in a company Standard Operating Procedures (SOPs).
3.

All systems are fully implemented, followed and we have a process to address to improve our systems when something goes wrong.
4.

We regularly review our systems to ensure they are as efficient and effective as practical in delivering the desired outcome.
5.

I'm confident that my employees would know what to do if the leadership team or I were not present for an extended period of time.

EXIT / SUCCESSION PLANNING

1.

I have developed a strategic plan for my business that supports my exit or succession plan.
2.

I have considered multiple channels to transfer my business. I have a clear picture of where my company will be in 3, 5, and 10 years from now.
3.

I have taken steps to ensure that I will have a sellable business.
4.

I have taken steps to ensure there is a key management team in place.
5.

My business has a continuity plan in place to address any situation.

FINANCIAL MANAGEMENT

1.

Our financial statements (including balance sheet and income statement) are current.
2.

We understand all of our financial statements and review them regularly.
3.

We understand and forecast our cash position to easily meet the demands of our business.
4.

Our products/services are priced to maximize profitability, and we revisit our pricing at least annually.
5.

We use benchmarking and financial ratios to compare ourselves to our own past performance and to others in our industry.

LEADERSHIP

1.

I know what I am feeling, am able to manage my emotions under most situations, and adjust accordingly for personality differences.
2.

I effectively manage my time, including not just at work but to take time for myself, my family, and my friends.
3.

I know how to monitor, coach, and bring the best out of all my employees.
4.

I am able to establish and manage a cohesive team
5.

I am preparing for the day when I will be able to step back and let new leaders step up.

LEADERSHIP

1.

I have a good balance of work, play and rest
2.

I am active in improving my overall health.
3.

I have a strong network of family and/or friends that I spend quality time with and enjoy regularly.
4.

My life has meaning, purpose, and fulfillment.

Thank you for taking the time to fill out your evaluation!