**Business Success Checklist:**

ANSWER

| **QUESTION** | **YES** | **NO** | **MAYBE** | **STATUS RATING (1-100)** |
| --- | --- | --- | --- | --- |
| Does the organization have a clear: |  |  |  |  |
| * Mission Statement? |  |  |  |  |
| * Vision Statement? |  |  |  |  |
| * Core Values Statement? |  |  |  |  |
| If I asked your average employee could they give me a pretty accurate answer to the above 3 items? |  |  |  |  |
| Is your organization doing a good job living/adhering to its Mission, Vision, Values? |  |  |  |  |
| Has the organization clearly identified (in detail) it’s ideal client(s) and their needs and come up with a proactive business development strategy to target them? |  |  |  |  |
| Does the organization have a 3-5 Year Strategic Plan with clear objectives that it updates every new cycle? |  |  |  |  |
| Does the organization have an Annual Business/Operations Plan that supports the strategic planning objectives? |  |  |  |  |
| Are the organizational objectives supported with SMART (Specific, Measurable, Actionable, Realistic and Time Related) Goals? |  |  |  |  |
| Does the CEO/President have a communications vehicle that reaches all employees on a regular basis? |  |  |  |  |
| Do you as the leader of your organization place a high enough emphasis on team building for your leadership team? |  |  |  |  |
| Does your leadership team have the business acumen to understand and manage to core financial metrics? |  |  |  |  |
| Does the organization practice performance transparency and regularly share financial results with staff? |  |  |  |  |
| Does the organization create and manage to an annual budget? |  |  |  |  |
| Does the leadership/management team meet on a formal and regular basis to debrief on organization results? |  |  |  |  |
| Does your organization have a use a formal decision-making filtering process to make key decisions? |  |  |  |  |
| Does the organization have in place a process to review its overall performance and solicit feedback from key advisors (Accountant, Banker, Attorney, etc.)? |  |  |  |  |
| Does your organization have accountability systems in place to ensure high levels of performance? |  |  |  |  |
| Does your organization have a Line of Credit In place equivalent to >= 10% of targeted revenues? |  |  |  |  |
| Is the organization committed to the ongoing leadership development of its key leadership personnel? |  |  |  |  |
| Does everyone in the organization have a clear and concise job descriptions that include key roles and measures of success (KPIs)? |  |  |  |  |
| Does everyone in a management role conduct regular team meetings in their area of responsibility with their dedicated staff? |  |  |  |  |
| Does everyone in a management/supervisory position throughout conduct regular 1-1s with their direct reports? |  |  |  |  |
| Does everyone in a management/supervisory position receive regular trainings to help them be successful in their role? |  |  |  |  |
| Does your organization have a standardized approach to recruiting talent? |  |  |  |  |
| Does the organization spend sufficient time screening new applicants for not just technical ability but cultural fit? |  |  |  |  |
| Does the organization have a standardized employee onboarding process that it adheres to on a consistent basis? |  |  |  |  |
| Does the organization have a clear and effective performance management/review process in place that it follows consistently? |  |  |  |  |
| Does the organization have a clear process in place to make promotion/succession planning decisions? |  |  |  |  |
| Does the organization regularly solicit feedback from employees regarding the workplace environment? |  |  |  |  |
| Does your company do salary surveys and pay at the market rate? |  |  |  |  |
| Does your organization offer a competitive benefits package? |  |  |  |  |
| Does your company have an incentive compensation plan for its key performers? |  |  |  |  |
| Do your key employees have an obvious career path with advancement milestones? |  |  |  |  |
| Does your organization have a brand management strategy that it is implementing successfully? |  |  |  |  |
| Does your organization have a clear Marketing Plan that it executes on consistently? |  |  |  |  |
| Does your organization have a good handle on its competitive environment and position itself accordingly? |  |  |  |  |
| Are there other people besides the CEO/President/Business Owner who are responsible for sales on a daily basis? |  |  |  |  |
| Does the organization regularly solicit feedback from customers on how it is meeting their current and future needs? |  |  |  |  |
| Does the organization have a process in place to ensure Product/Service Quality? |  |  |  |  |
| Does the organization have a process in place to regularly solicit client referrals? |  |  |  |  |
| Does the organization have a technology management plan to enable organizational efficiencies? |  |  |  |  |
| Does your organization have a process in place for capturing and implementing lessons learned? |  |  |  |  |
| Does your organization actively pursue industry best practice information and applying this information to the company? |  |  |  |  |
| Does your business have a Succession Plan in place if something happens to you and/or other Key people? |  |  |  |  |
| Are you (as the leader) consistently performing your key leadership roles and avoiding other tasks that take you off this agenda? |  |  |  |  |
| Do you know your shortcoming as a leader and are you working diligently to offset and/or overcome these limitations? |  |  |  |  |
| Is your business allowing you to achieve your individual wealth management objectives? |  |  |  |  |
| Are you having fun on a regular basis leading your organization? |  |  |  |  |
|  |  |  |  |  |
| **YES - TOTAL COUNT** |  |  |  |  |
| **NO - TOTAL COUNT** |  |  |  |  |
| **MAYBE – TOTAL COUNT** |  |  |  |  |

**What do these results tell you about your organization?**

**Pick Your Top 3 Items to Work On:**