



# CHECKLIST

## MY CLIENTS AND I MADE SO YOU DON'T HAVE TO...

Hoping for different results using the same strategy or tactic that isn't working.

Ignoring your business and/or marketing plan once it is complete; even worse, not having a plan to begin with.

Not developing and managing to key performance indicators (KPIs). Not making sure everyone in the organization defines "success" the same way.

Not planning and managing to multiple financial scenarios: best case, expected case, and worst case. Not knowing which way your business is trending.

Not realizing that there are no real expense reduction strategies that will fix a sales problem and no expense problems that a good revenue solution can't fix.

Not fully respecting the fact that "CASH IS KING" and that it will often erode more quickly than you can replace it. Reserves aren't a luxury; they are a requirement if you are to weather any storm or embrace any major opportunity.

Treating your profit center(s) like a cost center; spending money faster than you earn it (both personally and professionally).

Failing to understand that properly managed debt creates leverage or that improperly managed debt creates a compounding burden over time.



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Viewing marketing and business development as expenses instead of investments. Reaching new customers and markets requires money.

Hiring and/or keeping substandard talent in key roles. "You are your people."

Failing to become knowledgeable about the competition (including your competitive advantage); failing to stay up to date with the same.

Failing to measure and understand the importance and interrelationship of employee and customer satisfaction. Happy employees and customers aren't mutually exclusive; in fact, the opposite is usually true.

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Explaining away poor results rather than taking them seriously or failing to respond to them aggressively. The improvement curve only ever gets steeper over time.

Not appreciating the fact that the answer isn't always to work harder and longer. A long-term lack of work-life balance will ultimately negatively affect everyone in our lives and tend to lead to less-than-optimal decision-making.