



Answer each of the following 30 statements HONESTLY! Only check "Yes" if the statement is 100% true. You might want to even ask a trusted colleague or your spouse for their honest input. When finished, add up the total "YES" responses and evaluate your score on the reverse. **Don't discount the importance of an honest score in this evaluation!**

## How Healthy Is Your Business?

Concept 1 – Target and Goals	Yes	No
I can describe the ideal scenario for my perfect business		
I know what I want my business to realistically do for me		
I am very clear as to my own personal role in my business		
I know why I do what I do on a daily basis and have a clearly developed business purpose		
I have a very clear picture as to what I want my business to "realistically" be like in 5-10 years		
I have clearly defined personal and business goals, marked by targets and quantifiable metrics.		
Concept 2 – System Refinement and Organization	Yes	No
I have a clear understanding of the current SW/OT situation of my business		
I have a clear understanding of the "top 20" tasks that must be performed to assure consistency		
I keep a list of things that aren't working to my satisfaction in an effort to remedy them		
I can categorize and prioritize my "top 20" list as well as weaknesses that need addressing		
I have a list of all the systems/procedures that I have created or need to create in the near future		
Concept 3 – Business Management Frameworks	Yes	No
I know what my priorities are as the owner/manager of the business		
I have drafted and shared an organizational chart detailing key positions in my business		
I have an operations manual for routine systems and processes		
I have developed metrics to quantify the efficacy of my systems and processes		
I have developed means for documenting procedural effectiveness and have shared this with staff		
I have developed a reporting system (other than financial) for evaluating the strength of my business		
I have developed comprehensive written strategic marketing, financial and general business planning		
Concept 4 – Employee and Staff Management	Yes	No
I demonstrate effective and consistent leadership, encouraging change and adaptation		
I have an effective system in place to encourage communication and collaboration with all employees		
I have an effective system in place to reward employees and staff and maintain or increase morale		
I have comprehensive rules and policies in place, they are clearly communicated and equally enforced		
I have a recruitment process in place that reduces bad hires and represents my business effectively		
I have adequate and comprehensive initial and ongoing training programs, well-received by employees		
I have detailed procedures for strict documentation and records management related to all employees		
Concept 5 – Enhancement and Improvement	Yes	No
I know the questions to ask myself and my staff to improve a business process		
I know how to prepare a basic flow chart or algorithm to identify problems within a business process		
I have tried and used basic techniques to improve a business process or logistics		
In the past, I have successfully deployed a new or revised process that was met with enthusiasm		
A process is in place to encourage my staff and me to consistently re-evaluate business processes		

**Total "YES" Boxes Checked:**

## *Out of a possible score of 30, if your score is...*

**Less than 5.** This is not where you want to be in your professional situation. You're not sure where you're going and you don't know how to get there. You are constantly struggling, fighting fires in your business and have trouble focusing on what needs to be done. You also have trouble making decisions. You probably know that you need help and feel too overwhelmed with even knowing where to start. You might have technical expertise in an area and struggle with letting it go to focus on the business side of things. You're so caught up in the day to day running of your business there is no time or energy left to focus on yourself let alone growing your business. You have little or no control over managers and support staff. They have no direction, inconsistent leadership and most likely, your business is not realizing the profits you'd like. This environment is ripe for loss, poor morale, and punitive regulatory measures such as fines and audits as a result of poor financial, business and HR record-keeping.

**Between 5-10.** This is a step in the right direction. Things are ticking along in your business and looking just OK. You appreciate the value of systems and processes and understand that they are necessary to run a successful business. What you struggle with though, is following through and taking action on creating the systems that you know you need to create. You probably have a number of systems in your business already, but they may not be working efficiently, and probably not all of them are documented. You have a reasonable idea of where you're going in your business and what you need to do to get there, you just need to realize you can't do it all on your own. You need an advocate on your side to detail strengths/weaknesses and most probably, a means for organizing your business processes, finances and HR procedures.

**Between 10-15.** Things are looking up. You're in the driver's seat but might want to buckle your seatbelt because the ride is about to get a bit bumpy. You're experiencing a fairly good return on the energy you invest into your business and have a good picture of why you do what you do, and where your business is going. You likely understand many of the strengths and weaknesses, both internally and externally within your business and have some mechanisms in place to manage these. You have some documented working procedures in place and are planning to develop more. You have a fairly organized and structured approach and are working towards creating a business that relies on you less and less. You are probably an experienced businessperson who trivializes the formulation of written reports, procedure and action plans. This is a very dangerous position in an emerging economy. Do it now! Have an advocate willing to be beside you to ensure you ride the wave to the top and keep a positive ROI.

**Between 15-20.** You're on your way with creating a strong business management framework and continue to tweak it as needed. Your employees clearly know what is expected of them and you have developed great working relationships with them. They are heavily involved in creating working procedures and understand that they are all contributing to creating a smart working environment that produces consistent, predictable results every time. Your business is working for you now, and you are beginning to see some of the fruits of your labor. You are in a good position to grow or expand but BE CAREFUL! Getting too big, too fast can be the kiss of death. An experienced corporate consultant will help ensure the proper procedure for securing financing, growing a facility, branching into another location and adding staff.

**Over 20.** You have a finely-honed understanding of systems and perspective and understand that everything is made up of systems that we can create, update and adjust to make work more effectively and efficiently, and your main focus is on growing your business. You have a clear picture of what you want your business to look like and you have a plan for how to get there. Within your plan, there is a strong focus on systems as the core component to make it happen. You are also strongly focused on innovation and improvement and your employees share these values – if something isn't working they have a process for fixing it. You sit almost outside and slightly elevated from your business and can see with ease what is working and what is not. Challenges in your business are handled with ease as you know that all you have to do is fix the system responsible for making it happen. The biggest threat here is complacency. A skilled consultant will continuously identify your business processes and relate them to extrinsic market factors. A consultant versed in Mergers and Acquisitions can begin to hone your business for a liquidation strategy, ensuring maximum cash ROI should this be a part of your long-term planning.