

FocalPoint Business Coaching & Training

Name: _____

Office: _____ Cell: _____

Email: _____

Business Skills Assessment

One day Alice came to a fork in the road and saw a Cheshire cat in a tree. "Which road do I take?" she asked. "Where do you want to go?" was his response. "I don't know," Alice answered. "Then", said the cat, "it doesn't matter."

Alice in Wonderland, Author [Lewis Carroll](#)

Honestly and objectively assessing your business provides the necessary information to answer the question, "Where do you want to go?" Knowing where your business stands currently compared to the vision of where you want it to be is the clarity needed to improve effectiveness, revenue, and profitability.

To get the most out of this analysis, follow these steps:

1. Read each reason for business success or failure and give yourself a grade of 1-10, worst to best, in each area.
2. Collect your assessment scores on the chart at the end to give yourself a snapshot of your business today.
3. Identify your strongest and weakest areas. Why are they strong or weak?
4. Make a commitment to take at least one action immediately.

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The Keys to Business Success

Give yourself a grade of 1-10 in each area. Please Circle your grade.

1. Your **product** or service is *well suited* to the needs of the current market.
- You are selling, delivering and getting paid for your product or service.
 - You are earning a comfortable profit on sales.
 - Your customers are happy.

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| Assessment #1 | Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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2. You have developed a **complete business plan** before you commenced operations.
- You have analyzed your business and your market and you have a complete plan for sales, marketing and business operations.
 - You have planned out every detail of your business and you work your plan each day.

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| Assessment #2 | Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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3. You have done a **complete market analysis** of your product and its most attractive features.
- You have determined your *competitive advantage* in your market and are prepared to exploit it.
 - You have a complete advertising, marketing and promotion plan for your product/service.
 - You have a complete sales methodology and process to achieve the sales targets you have set.

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| Assessment #3 | Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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4. You have created a system for bookkeeping, accounting and **complete financial control**.
- You have a budget for each business activity.
 - You continually measure your results against your projections.
 - You move quickly whenever there is a variance from your projections.

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| Assessment #4 | Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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If there are no employees reporting to you directly or indirectly, please disregard.

5. Your key people function with high degrees of **competence**, capability and integrity
- You have clear job and responsibility descriptions for each function.
 - You have carefully selected and placed competent people in each important job.
 - There is no one in your business who you would not hire back again today if you had it to do over.

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| Assessment #5 Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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6. You are **well organized**, manage your time well, and have measures of performance for each key function in your organization/business.
- You always work on your most important tasks.
 - You/Everyone know(s) exactly what results are expected, and how the results will be measured and rewarded.
 - You regularly review key result areas and standards of performance (including anyone who reports to you)

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| Assessment #6 Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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7. You are clear, **determined and persistent** in your desire to succeed and profit.
- You have clear goals for yourself and your business in every area.
 - You focus on solutions rather than problems.
 - As far as you are concerned, "Failure is not an option!"

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| Assessment #7 Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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8. You **communicate clearly** and effectively with yourself and with all the key people in your business. *NOTE: if no employees, consider significant other.*
- You/Everyone know(s) your business goals and how to accomplish them.
 - You have regular self-review and information-sharing meetings with your staff; there are no secrets.
 - You keep your bankers, partners, significant others, and strategic alliances regularly informed about development in the business.

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| Assessment #8 Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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9. There is **strong** momentum in sales, driven by an effective sales process and an ongoing emphasis on profitable **marketing activities**.
- You follow a written marketing plan that generates a steady stream of qualified leads.
 - You have specific sales targets that you are committed to hitting – daily, weekly, monthly.
 - You have a successful sales process that turns prospects into customers most of the time.

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| Assessment #9 Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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10. You/everyone think(s) continually about acquiring, satisfying and keeping customers. Continually **focus on customer acquisition**.
- The purpose of a business is to create and keep a customer; all profits come from that.
 - Customer satisfaction is the only measure of business success in the long term.
 - If you are succeeding in this area, your customers are so happy with you that they recommend you to their friends.

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| Assessment # 10 Grade: | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
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Continue to the next page to record your scores in the grid.

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Summary Score

The more you practice the 10 reasons for business success, the greater will be your sales and profitability.

Area

Reasons for Business Success

| Your Score | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--------------------------------|---|---|---|---|---|---|---|---|---|----|
| 1. Product Fit | | | | | | | | | | |
| 2. Business Plan | | | | | | | | | | |
| 3. Market Analysis | | | | | | | | | | |
| 4. Complete Financial Control | | | | | | | | | | |
| 5. Key People | | | | | | | | | | |
| 6. Well Organized | | | | | | | | | | |
| 7. Determined / Persistent | | | | | | | | | | |
| 8. Communication | | | | | | | | | | |
| 9. Sales & Marketing | | | | | | | | | | |
| 10. Focus on Cust. Acquisition | | | | | | | | | | |

Total Score: Add all numbers and divide by 10. Score: _____

Your business should average "7" or more. One key weakness can be enough to put you out of business.

Please be prepared to discuss the following during our upcoming visit.

1. Identify your strongest and weakest areas. Why are they strong or weak?
2. What commitment did you make to take at least one action immediately?

After compiling your scores on this page, please scan or take a picture with your phone and email to me before our next meeting.
If you have any questions, please let me know.