

BUSINESS ANALYSIS ASSESSMENT

SECTION 1:

YOUR GOALS & OBJECTIVES

- ① What would you like your company to look like three years from now? What about ten? In other words, what's your dream for the business? How would it look if you could have it on your terms?
- ② If you had that ideal business - or at least were a lot closer to it than you are today - what would you be getting out of it that you aren't today? What would your role be if you could do anything? How could the business serve your life better?
- ③ What's your real assessment for what's standing in the way of reaching your business goals?

SECTION 2:

YOUR BUSINESS FRUSTRATIONS

- ① What are your three biggest or most persistent frustrations about your business?
- ② What have you tried so far to deal with these frustrations and how has that helped (or not)?
- ③ Have you ever worked with a business coach or consultant before and if so, what worked (and what didn't) with that experience?



The Keystone Business Analysis

This Business Analysis gives us a snapshot of the state of your business to start the conversation about how we can help.

A healthy business doesn't necessarily answer "True" to all of these statements, they are only a guide to help us discover what might be missing or could be improved. Many extraordinary businesses might only score 50% on this assessment. Our goal is to help you create a great business so we set the bar high. Don't be discouraged.

Mark each statement either **True** or **False** that best represents how close you and your business currently come to the statement.

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0. SELF-ORGANIZATION

1			I often make appointments with myself in my calendar.
2			I have no problem spending 1-2 hours each business day working ON my business (doing "forward looking" work) without interruption or distraction.
3			I use a web based calendar to make setting appointments with key people easy.
4			I use my calendar or project software to hold long-term commitments and project steps.
5			I often scan days or weeks ahead in my calendar to see what's coming.
6			I use my calendar/software to remind myself to follow up with people on important items so I don't have to remember.
7			I have a complete project list that I work from and review it at least weekly.
8			I regularly get done more than 80% of my to-do list each day.
9			My to-do list and calendar track most of what I do each day and keep me focused.
10			My workspace is never cluttered. The only items which require my action that are visible are the ones I'm currently working on.
11			My filing system is fun to use, organized, and cleared out of obsolete or unnecessary files.
12			I can find anything in my office or any other workspace in under a minute.
13			I can find any file I need on my computer in under a minute.
14			All data I access is organized by folders that are easy to navigate such that someone else could easily find something if needed.
15			My computer desktop is clean and free of icons I don't use frequently.
16			All our company's data is automatically backed up digitally, and for appropriate items, in a fire-proof safe.
17			My email inbox is completely empty at least once every day.
18			I always return messages within 24 hours.

19			I do what I say I am going to do more than 90% of the time, and when I don't there's a really good reason.
20			I keep with me some kind of idea capture tool wherever I go.
21			I am rarely overwhelmed, and if so, not for longer than a few hours.
22			It's easy for me to focus just on the task in front of me because I'm completely organized and my head is clear of distractions.
23			I "meet" with myself each day to plan my day and make sure I'm working on things based on the right priority.
%			<p>TOTALS</p> <p>Add up only the total "True" answers in this section and input the sum in the "True" column. Then divide the number of "true" answers by the total number of questions in the section and input the percentage on the left. You may wish to note your score from previous assessments if any.</p>

T	F	1. LEADERSHIP
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1			I have a clear sense of purpose in my life which I've put into a short statement that guides the choices I make with my business.
2			I have my personal goals written down, and they are driven by more core values.
3			I have a written vision for exactly what I want my business to look like.
4			I track my progress towards that vision by using business metrics that are right for my business.
5			I can see how my business is a reflection of me and I use that as motivation to work on myself as a business leader.
6			I don't avoid conflict, discomfort or challenging work. I don't procrastinate. If I find that I am, I figure out why.
7			I do what I say I'm going to do, by when I say I'm going to do it at least 95% of the time. When for some reason I can't - I always let the people involved know ahead of time so they can plan accordingly.
8			I know what the unique "spirit" of my business is and I can express that to others through stories and examples.
9			I understand how each of my frustrations are connected to deeper issues at the leadership and management levels on which I'm actively working.

10			I'm always looking for how my personal values are influencing business outcomes in positive and negative ways.
11			I'm inspired by the vision I have for my business - it keeps me going through tough times.
12			My excitement about where the business is going is contagious, and my staff is just as passionate in their own way about us reaching our goals.
13			I know how to cultivate other/future leaders in my business.
%			<p>TOTALS</p> <p>Add up only the total "True" answers in this section and input the sum in the "True" column. Then divide the number of "true" answers by the total number of questions in the section and input the percentage on the left. You may wish to note your score from previous assessments if any.</p>

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2. BRANDING

1			I know exactly who my ideal customer is and I have that written down in a complete demographic profile.
2			I am clear about where my most probable customers live and work and could point them out in any country, city, or town.
3			I understand what's meaningful to my customers - and how they think and act - and this knowledge is built into our brand and how we talk about our business.
4			Every member of our staff could tell you one thing - that they'd stake their personal reputation on - that distinguishes us from our competitors.
5			I understand how my customers think about our business because we've done all of our branding intentionally, to reach exactly the kind of customers we want to work with.
6			The sights, sounds, smells, touches and tastes of my business were designed and are periodically reviewed to be in alignment with our brand and our long term vision.
7			We have a documented marketing strategy that is a touchstone not just for advertising, but also touches every aspect of the customer experience.
8			Our marketing strategy is dynamic, reviewed and actively used by our managers.
9			We collect all relevant contact and demographic information from our customers and it lives in an easily sortable database

10			We perform market research periodically and use the information to evaluate changes in our products and approaches to new market segments.
11			I have a clear picture of our growth strategy and how our products and services tie into different markets we're working on.
12			We study our competition at least yearly and have an up-to-date analysis of the competitive landscape. Our analysis includes a review of our pricing relative to our competitors'.
13			We track marketing indicators like market potential, market coverage, and market share on at least a quarterly basis.
14			Our brand is clear, well-defined, and understood by everyone in our company, our customers, and our target market.
15			We proactively look for untapped markets and how to serve them via market segmentation and demographic analyses several times a year.
%			<p>TOTALS</p> <p>Add up only the total "True" answers in this section and input the sum in the "True" column. Then divide the number of "true" answers by the total number of questions in the section and input the percentage on the left. You may wish to note your score from previous assessments if any.</p>

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3. MONEY

1			Our chart of accounts is numbered and reviewed/cleaned up periodically.
2			We use accounting software I am happy and comfortable with and it has completely accurate information.
3			Our financial statements are completely accurate.
4			We are current with state and federal taxes.
5			I review our profit and loss and balance sheets for the previous month by the 5th day of the new month.
6			I forecast revenues and expenses using a budget variance report with documented assumptions at least twelve months at a time.
7			We have a system for analyzing the budget variance report and taking action each month.

8			I forecast and monitor cash flow at least a month or two in advance, if not more.
9			We have a plan to pay down debt, and never borrow money without a documented plan to make it cost-effective.
10			I understand why both sides of a balance sheet balance.
11			I monitor our direct/variable costs as a percentage, to a percentage point.
12			I know what our breakeven revenues are, calculated using the percentage of variable or direct costs.
13			We closely monitor average days payable and average days receivables. (leave blank if you never have receivables)
14			We have a system for collections. (leave blank if you never have receivables)
15			Our customers pay promptly 90% of the time or better.
16			I have clearly defined profit goals, from which I work backward in financial planning.
17			I can and do use financial statements to arrive at questions that lead to investigation and organizational change.
18			We have a line of credit available for emergencies that I'm satisfied is enough.
19			We pay our bills on time, every time and never have difficulty making payroll.
20			We produce and analyze profit and loss statements organized by profit center and/or department.
21			Our receipts include all necessary and relevant information.
22			We have controls in place that prevent theft.
23			I would not be worried if we were audited.
24			We track and analyze standard performance ratios each month.
25			We have enough cash to fuel growth.
26			We have sufficient cash to get the equipment, machinery and other assets that we need.
%			<p>TOTALS</p> <p>Add up only the total "True" answers in this section and input the sum in the "True" column. Then divide the number of "true" answers by the total number of questions in the section and input the percentage on the left. You may wish to note your score from previous assessments if any.</p>

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4. MANAGEMENT

1			I have a strategy for systemization based on documentation and integration of project management tools that enable my staff to work smart and not waste valuable time and creative energy.
2			I have an organizational chart that is actively used and no one crosses organizational lines inappropriately.
3			Every position has a result-oriented, actively used position agreement that employees are bought into.
4			My managers and I know how to effectively delegate and get great results by enlisting the support of our subordinates on projects.
5			We do performance reviews at least quarterly for all staff.
6			My people produce consistent results with little supervision.
7			The values of my company are clear, precise, documented and shared among all staff members.
8			Our employees are actively mentored by their managers and feel good about the career development support they get.
9			All our employees see their job as a vehicle for their own professional growth and talk about this with their manager.
10			All employees are brought into the vision for the company and see it as a means to achieve their own career goals.
11			We have a system for recruiting that ensures we hire the right people the first time.
12			We have regular trainings for employees to enhance their skills and knowledge.
13			We have a system for how to groom people to take on more responsibility related to their own professional growth.
14			It is clear to employees and candidates that they get much more than just a paycheck by working for us.
15			I have an executive management team that is well on the way to freeing me from the majority of day-to-day and even higher level business issues.
16			Employees actively work ON the business and revise/develop systems as part of their work periodically or by project.

17			Each position has a specific training agenda to follow immediately upon hiring.
18			We have programs that allow for employees to get to know what work is like in other departments and encourage cross-training when appropriate.
%			<p>TOTALS</p> <p>Add up only the total "True" answers in this section and input the sum in the "True" column. Then divide the number of "true" answers by the total number of questions in the section and input the percentage on the left. You may wish to note your score from previous assessments if any.</p>

T	F	5. DELIVERY
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1			I am satisfied with the quality of our products/services.
2			Our customers are thrilled with the quality of our products/services.
3			The excellence with which we deliver our service drives a good portion of our new business through word of mouth and repeat business.
4			Our products/services are produced and delivered consistently and on time, every time.
5			We consistently go above and beyond the call of duty with our customers without selling out on our values and profit.
6			We track key production, delivery and customer service indicators to make sure we're delivering on our promise and manage, train, and innovate by them.
7			Our production and delivery costs are consistently what they should be.
8			I hardly ever have to put out fires on the customer facing side of the business.
9			Our delivery system is documented and is easy to train new people on.
10			My people need little or no supervision to ensure the quality of their work.
11			We effectively track, manage and plan for capacity to ensure optimum efficiency and minimum waste.
12			Our people are personally invested in efficiency as they see excellence as an expression of themselves.

13			We look at key aspects of our customers' experience to strategize where to make improvements next.
14			Our entire delivery system is flowcharted so we can better follow it, work ON it, and train it.
15			Our customers are served almost completely by people other than me. I only take on work for our 'highest-value' clients or on forward looking projects.
16			We periodically review to see how our marketing strategy and client fulfillment strategy are in alignment and brainstorm new ways to improve the experience from front to back.
%			<p>TOTALS</p> <p>Add up only the total "True" answers in this section and input the sum in the "True" column. Then divide the number of "true" answers by the total number of questions in the section and input the percentage on the left. You may wish to note your score from previous assessments if any.</p>

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6. SALES

1			We track and analyze our conversion ratios by salesperson.
2			I am pleased with our average lead conversion ratio.
3			I'm not the best sales person for our products/services.
4			Our sales process is systematized and includes an emotional sales conversation roadmap and response modules to the most common concerns or hesitations.
5			We have a referral program and use it often.
6			We have a customer relationship management system that keeps us in touch with our past and existing customers and provides them with ongoing value and opportunities to do more with us.
7			I am confident we make the best use of every lead.
8			Our salespeople are clear about what our customers' needs are during the sales process.
9			Our salespeople care about their customers and are invested in making sure customers get what they were promised after the sale.
10			Our salespeople are always honest, keep their word and work ethically.

11			We have systems for up-selling and/or proactively inviting our existing customers to take advantage of more of our products/services as it suits them, without being pushy.
12			Our salespeople proactively engage the needs of our prospects and consult with them to best meet those needs.
13			Our salespeople consider understanding the psychology of our customers a fascinating part of their job and are constantly trying to understand them more deeply so they can serve them better.
			It's easy for us to forecast sales volume and this is reflected in our budget variance report.
%			<p>TOTALS</p> <p>Add up only the total "True" answers in this section and input the sum in the "True" column. Then divide the number of "true" answers by the total number of questions in the section and input the percentage on the left. You may wish to note your score from previous assessments if any.</p>

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7. MARKETING

1			We can track the effectiveness of our lead generation activities.
2			We ask every new lead how they heard about us and record the data in a database.
3			We can turn our flow of leads on and off like a faucet to suit our needs, goals and capacity.
4			We're currently getting enough leads.
5			Our marketing is consistently cost-effective and more than pays for itself.
6			We utilize public relations for lead generation on a regular basis and maintain relationships with key people in the news and other industries.
7			We periodically review new marketing channel possibilities along with our market segmentation analysis.
8			We have a marketing process that includes an execution calendar, campaign budgets, reach estimates, cost per lead forecasts and results, etc.
9			We ensure that our lead generation messaging is consistent with our brand.
10			We use data from our lead generation activities to evaluate and refine our marketing strategy.

11			I know how to evaluate a lead generation piece and interpret its “logic” on both unconscious and conscious levels.
12			I can look at any lead generation piece and infer the market being targeted.
%			<p>TOTALS</p> <p>Add up only the total “True” answers in this section and input the sum in the “True” column. Then divide the number of “true” answers by the total number of questions in the section and input the percentage on the left. You may wish to note your score from previous assessments if any.</p>

SCORECARD:

You are encouraged to input scores from previous assessments (if any) here for comparison, with the most recent scores on the left. Input the date where indicated.

SECTION	SCORE%	SCORE%	SCORE%	SCORE%
	Date:	Date:	Date:	Date:
0				
1				
2				
3				
4				
5				
6				
7				
AVG				