



Small Business Assessment

**Get Clear, Stay Focused and
Take Action to Grow Your Business**

SUCCESSNET.ORG

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The Core Building Blocks of Your Business



Introduction

Why You Should Use this Assessment

Socrates said, “The unexamined life is not worth living.” If that’s true, then surely the unexamined business isn’t worth owning.

I’m Michael Angier and I created this business assessment to help you take a close and in-depth look at all aspects of your business and its operations. You could call it the “Socratic Approach” to business.

In my 30-plus years of business experience, I’ve found that entrepreneurs usually have better diagnostics performed on their car than on their business.

A typical oil change can have a 17-point checklist. We get physical exams with a barrage of tests. Our stock portfolios are evaluated and assessed on a regular basis.

But our business—the vehicle that supports us and usually a number of others—rarely gets the same detailed inspection. This assessment will provide you with information that you may have been missing.

Many people expect their lawyers and accountants to do much of this for them. But these professionals tend to focus only on certain areas. They usually lack the whole-picture approach.

This comprehensive business assessment is different. It addresses the core building blocks of a solid and long-lasting principle-driven business. It’s not only about strategies and tactics that change often and vary from business to business and industry to industry.

By completing this instrument, you’ll have a better understanding of where you stand and what areas need improvement. You’ll likely identify some things that you may not have been aware of and discover some gaps that need filling in.

This assessment is for all types of companies. Some parts of it will be more critical than others depending on your stage of growth—but all areas are important.

The process is designed to help you take a detailed snapshot of your business at this particular point in time. In doing so, you’ll be able to see where you want to set new objectives, shore up areas that are lacking and get your business operating at peak performance. Your answers aren’t meant to be a judgment—but rather to help you observe your business from a new vantage point.

The knowledge, perspective and insight this exercise will provide you will help you to establish clearer priorities, make better decisions and save you considerable time, money and aggravation. It may very well even keep your business from failing.

You will emerge from the process with a much clearer and more complete picture of your business and a more comprehensive understanding of how all the pieces fit together.

Going through this assessment will make you think. It will challenge you. It might even make you mad.

But you can't change what you don't acknowledge and measure.

I believe that clarity leads to power and that the more you understand, the sharper your focus, the more successful your business will be—and the more satisfaction it will bring to you.

And then, in six months or a year, you can do this assessment again. You can use each one as a benchmark and a roadmap to growing your business—to getting your business to work for *you* instead of you working for *it*. You'll be able to see your progress and your business will become stronger and more competitive.

There is no fee for this assessment. It is yours with our compliments. But please don't let the fact we're giving it to you diminish its value. I know you will gain great benefit from working through each section, evaluating and looking for ways to make your company better.

How to Use this Assessment

I suggest you go through this process when you are unlikely to be interrupted or distracted. It doesn't have to be completed all at once, but it should also not be rushed.

There are no right or wrong answers. Simply be honest with yourself and as to the truth of each statement.

You may want to consult with members of your staff or management team as to their perspective, but for the most part you should be able to do this on your own.

Your assessment is confidential. You need not share it with anyone. However, if you should decide to have me review it and we schedule a consultation, rest assured that I will hold this information in the strictest of confidence.

Before you begin, remember what international speaker and consultant, Nido Qubein says, "Your present circumstances don't determine where you go; they merely determine where you start."

This exercise is a chance for you to see where you are now. Once you know where you are, you can chart your course to any place you decide.

And I'm willing to help you with your chart and your navigation.

Date _____

Instructions

Read each statement and choose the rating that best indicates your level of agreement:

		Excellent			
		Adequate			
		Needs Work			
		Non-Existent			
I. Organization/Business Model					
1.	I have a clear business model. I can explain my business model easily and quickly so that virtually anyone can understand it.				
2.	My business model is easily scalable. Revenues can be increased substantially without costs increasing in the same proportion and not requiring me to work harder and longer.				
3.	My business adequately supports my lifestyle, personal objectives and personal values.				
4.	My business is mostly fun and I get to do what I love doing at least 90% of the time.				
5.	I am absolutely confident of the exceptional success of my business.				
6.	I could take at least a week off on short notice without the business suffering.				
7.	My business works for <i>me</i> , I do not work for <i>it</i> .				
8.	I work at last 80% of the time <i>on</i> my business instead of <i>in</i> my business.				
9.	My company is a good member of the community.				
10.	My business is an excellent steward of the environment. My company does no harm and helps wherever it can.				
II. Leadership/Strategic Planning					
1.	I know and can articulate my company's core values .				
2.	My company demonstrates its core values in all aspects of operations.				
3.	My company has a written mission statement and all stakeholders are familiar with it and can easily articulate it.				
4.	The vision for my company is clear and talked about often.				
5.	I have a mastermind team and/or board of directors that meets regularly and supports me in our company's success by providing me with feedback, insight and actionable recommendations.				
6.	I have a coach and/or mentor who provides valuable and trusted advice and counsel.				
7.	I am clear on my top three business goals and make progress on them every day.				
8.	I have a written and detailed 3-5 year strategic plan .				

		Excellent	Adequate	Needs Work	Non-Existent
9.	I regularly review and update my business SWOT (Strengths, Weaknesses, Opportunities and Threats).				
10.	I am clear on my top three business problems/challenges and have developed strategies and action plans to resolve them.				
11.	I have a well thought-out exit strategy for my business.				
12.	I set quarterly revenue goals and am satisfied with the results.				
III. Niche/Brand/USP					
1.	My company has a clearly defined, readily accessible and ample target market .				
2.	My company has a clearly defined niche .				
3.	I regularly conduct market research to better understand my business' target market and the environment in which my business operates.				4
4.	My business is highly regarded by others in my industry.				
5.	My company has a clearly communicated Unique Selling Proposition (USP) .				
6.	My company has a well-recognized brand and builds upon it all the time.				
7.	My company logo, business cards, stationary, website, signage , etc. are consistent with my business' brand and represents my business professionally.				
8.	I have an attention-getting, easily understood and compelling audio logo or " elevator speech ".				
9.	I am clear on the profile of our ideal client.				
10.	I have an outstanding and attention-getting "story" about my company—one that differentiates my company from others and makes people want to find out more about my company.				
IV. Sales/Marketing					
1.	Sales revenues are on track and more than sufficient to meet all obligations.				
2.	I am clear on my business' top marketing/sales strategies and have implemented them.				
3.	We have an up-to-date, easy-to-use mailing list for contacting and following up with customers and prospects—and we use it regularly.				
4.	I know and appreciate the lifetime value of one of my customers and have set up my business to foster that.				
5.	I have a clearly defined and monitored sales funnel (qualified lead acquisition).				

		Excellent			
		Adequate			
		Needs Work			
		Non-Existent			
6.	I have a clearly defined and monitored conversion process (qualified leads to customers).				
7.	I have recent, specific and credible testimonials to provide compelling social proof of the quality and value of my business' products and services.				
8.	My company has an easy-to-use and effective referral system to make it easy for my customers and stakeholders to refer business to my company on a regular basis.				
9.	My advertising is targeted, cost-effective and consistently brings in new business all the time.				
10.	I know my competition and monitor them and my industry closely.				
11.	My company has a steady, sufficient and sustainable growth.				
V. Finance/Legal					
1.	I have a bookkeeper and/or accountant to keep my financial business records and reports up to date and accurate.				
2.	My business has an excellent credit rating .				
3.	I have sufficient cash and capital reserves to handle most cash flow hurdles.				
4.	I have an adequate credit line to borrow from as needs arise.				
5.	All tax returns and estimated payments are filed on time—every time.				
6.	My company is in complete compliance with all state, local and federal requirements.				
7.	I have sufficient legal representation .				
8.	I have adequate insurance (liability, casualty, etc.).				
9.	My intellectual capital is adequately protected.				
10.	Cash flow is planned and tracked in order to manage requirements.				
11.	I have an excellent working relationship with my lending institution .				
12.	My accounts payable and receivable reporting is up-to-date and monitored closely.				

		Excellent			
		Adequate			
		Needs Work			
		Non-Existent			
VI. Operations/Infrastructure					
1.	I have a detailed written operations manual that is kept up to date and outlines the processes and procedures for every aspect of my business.				
2.	I have defined my business' key metrics and performance indicators —and I track them well.				
3.	I have all the right tools and the proper equipment to do my work exceedingly well and to accomplish my business objectives .				
4.	I have the right systems to support my team in reaching business goals.				
5.	My work environment is healthy, safe, comfortable and conducive to productivity and creativity.				
6.	My business website is professional and easy to navigate. It has the ability to capture leads, and every page has a clear objective.				
7.	My business facilities, products and equipment show that I care.				
VII. People					
1.	I easily attract and retain good employees or contractors .				
2.	I have the right team —the right people on the bus and in the right seats.				
3.	My people know their jobs and are outstanding performers. They know the exact results they are expected to produce and they get it done.				
4.	I have effective strategic alliances and joint ventures . I play win/win.				
5.	I train my people well and I'm constantly helping them improve their knowledge, skills and attitudes.				
6.	I am cognizant of the value and contribution of all of my stakeholders such as suppliers, staff, mastermind team, professional advisors, stockholders/investors, JV/strategic partners and contractors. I treat them all as partners.				
7.	I communicate effectively.				
8.	I regularly celebrate victories and milestones.				
9.	My employees are excited, motivated and feel part of the process.				
10.	I keep my agreements .				
11.	For the most part, my staff looks upon my business as fun and interesting .				

		Excellent			
		Adequate			
		Needs Work			
		Non-Existent			
VIII. Customer Care/Service					
1.	I am confident the quality of service/product is consistently better than my competitors and my customers verify this.				
2.	I practice extreme customer care . I respond to customer service issues quickly and resolve them without delay.				
3.	My company has an impeccable reputation . My customers/clients trust us.				
4.	I am constantly striving to know and understand my customers and clients better and have effective systems for doing so— focus groups, surveys, etc.				
5.	My customers enjoy doing business with us.				
6.	My customers are raving fans . I rarely, if ever, have dissatisfied customers.				

Summary

We hope you've found this process helpful and enlightening.

In this next step, we recommend that you identify three rankings that are **less than Excellent**. These are the areas that you would like to target for improvement.

Then, plan the strategies and projects that will allow you to rank these areas as excellent the next time you use the Small Business Assessment.

And if you would like more help and a better understanding of your Small Business Assessment results, please see the next step on the following page . . .

I Plan to Focus on Improving these 3 Rankings that I Marked Less than Excellent:

1.	
2.	
3.	

Want More Help?

If you decide you would like to have my perspective and recommendations, I would be happy to help you.



We can meet by phone and I will ask a few more questions and give you my recommendations.

I usually charge over \$500 an hour for personal consultations, but because I really want to help you take your business to the next level, I'm offering a special price—only \$100. This is for my personal review and telephone consultation.

I'm so confident in the value I can provide for you that I'm willing to give you a unique guarantee. If after we've met on the phone, you don't think this process, the consultation and my suggestions were worth at *least* \$500 to you and your business, I will gladly refund you the \$100. It doesn't get much better than that.

Note: Due to Time Constraints, this Offer May Be Withdrawn at Any Time

And yes, there's more . . .

If you qualify, and you decide to become part of my inner-circle Diamond Club program, the consultation fee is transferrable—you can use it as your first month's membership which, of course, would make the consultation free.

Fair enough?

www.SuccessNetDiamonds.com

All I require is that you fully complete the assessment and the short profile we will send you before we speak. I promise to give you my best observation and insight to help you and your business grow.

Whether you choose to keep this instrument a *self* assessment or we spend some time together finding ways to improve your business, I wish you the best of success in your business.

To order your review, evaluation and consult, go to

www.SuccessNet.org/makeover/

You can then access my online calendar and select the best time for us to meet by phone or Skype. I look forward to hearing from you.

SuccessNet Resources

Your Core Values™ eCourse

Discover, define and begin living in accordance with your true values. Decisions, work and life become easier.

<http://YourCoreValues.com>

How to Write a Mission Statement

We've developed a special report to guide you through a series of helpful steps to create your own impassioned mission statement.

<http://SuccessNet.org/mission-report.htm>

How to Write an Inspiring Vision Statement

This special report shows you exactly how to get clear on and craft a grand and inspiring vision.

www.SuccessNet.org/vision.htm

Diamond Club MasterMind Team

Reach your goals with training from SuccessNet and the support of your very own MasterMind Team

<http://SuccessNetDiamonds.com>

Rapid Development Websites Service

Get your website created and online fast!

<http://SuccessNetWebsites.com>

Mega Traffic System

Position your website to receive a ton of visitors

<http://SuccessNetTraffic.com>

Professional Presentations Package Full of Resources

Improve your presentations skills and create a WOW! audience experience.

<http://SuccessNetPresentations.com>

101 Best Ways to Get Ahead & 101 Best Ways to Be Your Best

The most successful people in the world give their best advice to help you achieve.

<http://101BestWays.com>

SuccessMark™ Cards

Inspirational and motivational online greeting cards—free!

<http://SuccessMarkCards.com>

SuccessNet Resource Book (Free)

The top must-have tools, products, services & resources for running your business effectively

<http://SuccessNetResources.com>

Automate Your Online Business

<http://TestDriveOurShoppingCart.com>

About SuccessNet

SuccessNet is an international association of people committed to operating at their personal and professional best—to creating excellence in their lives and throughout their respective organizations. We support people in developing the skills, knowledge, belief and passion to achieve their objectives.

OUR MISSION:
to inform, inspire and empower people to be their best—personally and professionally.

SuccessNet is dedicated to helping you become more knowledgeable, prosperous and effective. In addition to our publications, we provide a complete membership package dedicated to making your business easier and more fun.

Since 1995, over 250,000 people from all around the globe have benefited from the SuccessNet experience.

People from all walks of life become members: small-business owners, managers and people who want to get ahead in their careers. Our members want to maximize their potential, improve the quality of their lives and make a lasting difference in the world.

SuccessNet is for good people and good companies who want to become even better.

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