

## INSTRUCTIONS FOR THE ASSESSMENT

This Assessment is for those business owners who are committed to:

- Change
- Improving their business
- Knowing where they need to improve
- Spending the time to find out where they are and where they want to be in the future

**This does not pertain to you if you have not yet made the above commitments.**

This type of assessment is modeled on GAP Analysis - that is the difference between where you want to be and where you are at the present time. This analysis does not even address where you should be, just where you think you are and where you really are.

This assessment is about YOU and YOUR business. This is not a short assessment, it examines all facets your business in a very detailed manner.

Take your time to complete it, you can save the file at any time and come back to it. Always use the "Save as..." command and give the file a memorable name. You may want to complete another assessment a few months later and compare the differences

Most Areas are protected, so the spreadsheet won't let you change them, the areas where your input is allowed is in all cases **Blue**.

### STEP 1

Input below the three areas that you believe are the most critical areas of need or development in your business at this time (for some suggested areas - see the areas in STEP 2)

1.
2.
3.

Input below your three wishes to improve your business (they may be same as above or not)

1.
2.
3.

**STEP 2**

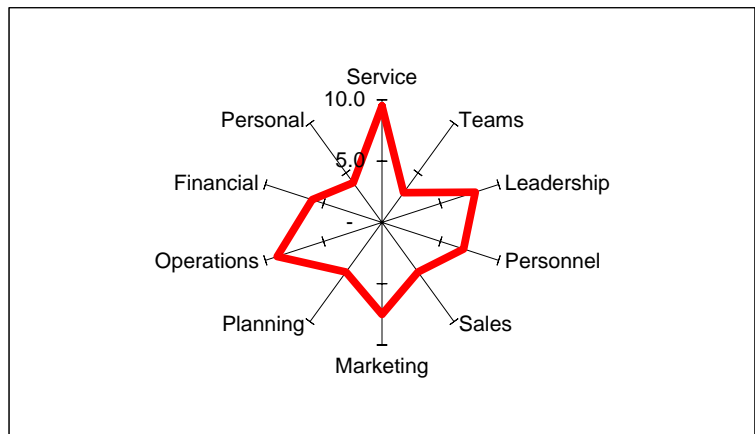
There are Ten areas (sections) of the assessment.

- |                    |            |            |
|--------------------|------------|------------|
| (Customer) Service | Teams      | Leadership |
| Personnel          | Sales      | Marketing  |
| Planning           | Operations | Financial  |
| Personal           |            |            |

You need to input a score of 1.0 (Weak) to 10.0 (Strong) for each section in the yellow input area below that reflects the strength of the section in your opinion.

	Area		%
1.0	Service		9.5
2.0	Teams		3.0
3.0	Leadership		8.0
4.0	Personnel		7.0
5.0	Sales		5.0
6.0	Marketing		7.5
7.0	Planning		5.0
8.0	Operations		9.0
9.0	Financial		6.0
10.0	Personal		4.0

\*\*\* If a section does not apply to you or your business, leave the score at ZERO and **do not answer the questions in that section.**



**STEP 3**

Work through the following pages and answer the questions to the best of your ability, be brutally honest with yourself in giving the answers - the more honest you are, the better the output will be.

If a section does not apply to you or your business (and you've left the score at zero) make sure that you do not answer the questions in that section.

For each question there is a drop down list of answers, choose one answer for each question

Do the Personal section first and then do the rest of the sections. After completing all sections go back and review the Personal section again.

#### STEP 4

##### Review the **Results tab**

Where the Blue filled in area is **INSIDE** the Red (Target) Line your actual performance for that section is less than you think it should be and obviously needs work.

Where the Blue filled in area is **OUTSIDE** the Red (Target) line your actual performance is exceeding your expectations.

#### STEP 5

##### Self Analysis

Ask yourself the following questions

Are my expectations too low?

Are my expectations too high?

Why did I fall short in a particular section?

Why was I successful in a particular section?

What actions can I replicate from successful sections in the sections that need work?

Review your Three Wishes and your Three Most Critical Areas from **Step 1**. versus the results.

Ask yourself the following questions

Were my Three Wishes and your Three Most Critical Areas aligned with the my results?

Where were they different?

Why were they different?

If you would like to spend some time and have SBS review the questions and results with you [contact us](#).

We would be pleased to help you with a free, no obligation review of the assessment.

**Here is one the ten sections you will explore**

<b>1.0</b>	<b>Service</b>	
<b>1.1</b>	My company tests and measures everything to ensure customer satisfaction	Not Sure
<b>1.2</b>	We analyze our mistakes as both a company and as individuals and learn from them	Completely Agree
<b>1.3</b>	We are certain of the needs of our clients and base our company on those needs	Not Sure
<b>1.4</b>	Our direction and people can change instantly to meet our customers needs	Disagree
<b>1.5</b>	I would gladly give up or postpone a sale to meet my customer service agenda	Agree
<b>1.6</b>	Our company continuously under promises and over delivers	Completely Agree
<b>1.7</b>	We survey our clients regularly to determine how we can better serve them	Not Sure

**Next are sample results from all ten sections**

### Your Company Profile

