



WHAT IT IS
A SELF-ASSESSMENT TOOL TO UNDERSTAND WHERE YOU ARE AT

GOING IT ALONE?

We want to describe where we are today compared to what our ideal outcome looks like. What is working in our business, but not yet at the standard we want it to be.

Using a score out of **10**, rank your assessment; **10** being the highest, and **0** the lowest. A score of more than **8** indicates it is going well but not yet perfect and below **5**, we have some work to do.

This checklist is designed to focus on "best practice" - a score of 10 out of 10! We want to avoid "what it is not" because this in itself does not set a benchmark that we aspire to achieve.

WHAT IT IS...STRATEGY AND TIME ON THE BUSINESS

	Self Assess	Co-Worker	Manager / Owner	Goal
I have 1, 3 and 5 year business and wealth goals and know where I am at				
I know why I am in business and who are the customers/clients I help				
I structure sufficient of my time for investigating and developing business strategies to grow my business				
I have or am building a team structure so the business can manage without my day to day input				
My finance structure for the business allows me to live the lifestyle I want without compromising the business				
I have "gold standards" for every process that involves a customer				
I think about change as an opportunity not a threat				
I am satisfied with my financial and lifestyle outcomes from the business				
I am passionate about what I do and are committed to delivering outcomes that meet and exceed customer expectations				

WHAT IT IS...MAKING THE BEST DECISION I CAN

	Self Assess	Co-Worker	Manager / Owner	Goal
I have systems in place to provide me and my staff with timely and useful information on how the business is running				
My systems monitor and produce timely reports on customers, sales \$ and gross margins				
I have clear Key Performance Indicators which tell me the health of my business				
I know where my business bottlenecks are and what areas I need to manage successfully to get the benefits of from growth				
I have systems in place that support and assess key metrics that predict my success				
I use external advisers proactively to help me make major decisions				
I have a clear focus on the most important aspects of my business and plan accordingly				
I set financial goals for the business each year and monitor at least monthly				
My staff present options and identify risks to me when presented with challenges within the business				

WHAT IT IS...ACHIEVING YOUR DREAM OUTCOMES

	Self Assess	Co-Worker	Manager / Owner	Goal
I am on track with my business goals and financial outcomes				
I am on track with my wealth creation and future retirement plan				
I love my business and the work that I do				
My family time is important to me and I get to spend quality time with them that I want				
My staff are fantastic and I can go on holidays knowing the business won't fall apart				
My business makes enough profit and cash to provide a lifestyle that my family and I are grateful for				
I know my end game for my business and how long I will be working for				
I am on track with my business goals and financial outcomes				