



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

**GROWTH**

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...PLAYING TO WIN**

	Self Assess	Co-Worker	Manager / Owner	Goal
I focus on sales strategies that exploit our business' strengths				
I know who my competition are and their pricing structures, and clearly understand what are my competitive advantages				
I know who my ideal customers/clients are and their unmet needs				
I have a structured process to assess new opportunities				
I have systems in place that support and assess key metrics that predict my success				
I know where my business bottlenecks are and what areas I need to manage successfully to get the benefits of from growth				
I have "gold standards" for every process that involves a customer				
I have mapped out my customer's buying journey and know their hot buttons				
I am committed to staff training to ensure their sales and communications skills optimize our customer's experience				

**WHAT IT IS...CRITICAL NUMBERS**

	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 sales \$ and gross margins				
I have clear Key Performance Indicators which tell me the health of my business				
I understand mark ups and gross margins, and leverage this knowledge in setting my pricing				
I spend 2.5 hours per day on promoting my business				
I have clear goals for prospecting numbers and sales conversions and can pinpoint where customer interest is lost				
I have a formal onboarding process to weed out low value customers				
My marketing and follow up processes are focused on both the ready to buy category and the 90% who are not aware category				
I know which customers buy our highest margin items				

**WHAT IT IS...CUSTOMER RETENTION and LOYALTY**

	Self Assess	Co-Worker	Manager / Owner	Goal
I have a formal system to track our customers spend and preferences				
I acknowledge and reward our customers who provide my business with referrals				
I have a formal process to obtain customer feedback				
My staff have the authority to deal then and there with customer concerns/issues				
My business is structured on delighting customers at every occasion				
We workshop customer feedback with all our staff through training and team meetings				
My staff know what our customer "gold standard" is				