



Performance Assessment

Company Name:

Your Name:

Today's Date:

The purpose of this assessment is for you to look carefully at your organization to identify areas of competence, as well as specific areas in need of improvement. The assessment contains two parts. Part A may be completed in 15-30 minutes, while Part B may require an hour or more of your time. Both parts provide valuable information, but it's up to you how deep and/or wide you want to go. You may choose to answer some questions and skip others, knowing that the best data will result in the most complete assessment.

If you choose to share all or a portion of your responses with us, rest assured that in all cases we agree to maintain strict confidentiality of any information you may provide to us. A formal non-disclosure agreement is available upon request.

If you would like to discuss your assessment with us, please scan & email the completed questionnaire to growth@mypmcteam.com or fax to 248-436-8126. Thank you.

PART A

There are 36 elements of organizational performance in the following six major focus areas:

High-Performance Organizations (HPOs) have:

- Inspiring Leadership
- Cohesive Leadership Teams
- Purposeful Strategy
- Effective Marketing
- Dedicated People
- Sound Financials

For each element listed below, rate your organization using the following rating scale:

- 1 = Strongly Disagree
- 2 = Disagree
- 3 = Neutral
- 4 = Agree
- 5 = Strongly Agree

Inspiring Leadership

Our leaders:

- | | | | | | |
|------------------------------------------|---|---|---|---|---|
| • Are emotionally intelligent | 1 | 2 | 3 | 4 | 5 |
| • Define their ideal vision | 1 | 2 | 3 | 4 | 5 |
| • Are self-aware | 1 | 2 | 3 | 4 | 5 |
| • Create an intentional development plan | 1 | 2 | 3 | 4 | 5 |
| • Implement their leadership plan | 1 | 2 | 3 | 4 | 5 |
| • Create positive workplace cultures | 1 | 2 | 3 | 4 | 5 |

Total score for Inspiring Leadership:

Cohesive Leadership Teams

Our leadership team:

- | | | | | | |
|--------------------------------------------------------|---|---|---|---|---|
| • Has the right people on the team | 1 | 2 | 3 | 4 | 5 |
| • Holds effective weekly meetings | 1 | 2 | 3 | 4 | 5 |
| • Makes decisions quickly & supports them | 1 | 2 | 3 | 4 | 5 |
| • Holds each other accountable | 1 | 2 | 3 | 4 | 5 |
| • Is clearly focused each quarter | 1 | 2 | 3 | 4 | 5 |
| • Tracks, reports, monitors, & anticipates key metrics | 1 | 2 | 3 | 4 | 5 |

Total score for Cohesive Leadership Teams:

Purposeful Strategy

Our strategy:

- | | | | | | |
|-----------------------------------------------------|---|---|---|---|---|
| • Supports our core purpose | 1 | 2 | 3 | 4 | 5 |
| • Is consistent with our core principles | 1 | 2 | 3 | 4 | 5 |
| • Accounts for our internal & external environments | 1 | 2 | 3 | 4 | 5 |
| • Clearly articulates a vision for the future | 1 | 2 | 3 | 4 | 5 |
| • Includes a roadmap for achieving the vision | 1 | 2 | 3 | 4 | 5 |
| • Includes implementation of an operational plan | 1 | 2 | 3 | 4 | 5 |

Total score for Purposeful Strategy:

Effective Marketing

Our marketing:

- | | | | | | |
|-------------------------------------------|---|---|---|---|---|
| • Analyzes market opportunities | 1 | 2 | 3 | 4 | 5 |
| • Segments and targets markets | 1 | 2 | 3 | 4 | 5 |
| • Discovers customer needs | 1 | 2 | 3 | 4 | 5 |
| • Develops unique customer solutions | 1 | 2 | 3 | 4 | 5 |
| • Includes a comprehensive marketing plan | 1 | 2 | 3 | 4 | 5 |
| • Tracks & analyzes marketing results | 1 | 2 | 3 | 4 | 5 |

Total score for Effective Marketing:

Two more major focus areas...

Dedicated People

Our people:

• Are the right people in the right seats	1	2	3	4	5
• Have clear roles, responsibilities & expectations	1	2	3	4	5
• Follow documented processes	1	2	3	4	5
• Are members of at least one well-defined team	1	2	3	4	5
• Receive clear, transparent & frequent feedback	1	2	3	4	5
• Are fairly-compensated & rewarded for performance	1	2	3	4	5

Total score for Dedicated People:

Sound Financials

Our financial(s):

• Are managed with accountability	1	2	3	4	5
• Are managed within in a clearly-defined process	1	2	3	4	5
• Results are regularly analyzed	1	2	3	4	5
• Results are tracked & aligned with projections	1	2	3	4	5
• Goals are driven by a deeper purpose	1	2	3	4	5
• Wealth is shared within the organization	1	2	3	4	5

Total score for Sound Financials:

Total overall score:

What does this mean? A perfect score is 180 and the worst score possible is 36. However, the score is not what is important. What is important is your awareness of how strong or weak your organization is with respect to each of the 36 elements and each of the six major focus areas. High-performance organizations leverage their strengths while also addressing their weaknesses. Now is the perfect time for you to consider your organization.

Take a few moments right now to document your thoughts. Which areas of your organization need to be addressed to improve performance?

PART B

This part of the assessment explores several areas of both your personal and professional lives. It is meant to (1) make you think about these areas, with the goal of creating awareness and opportunity, (2) provide your coach with helpful information, assuming you may choose to work, or already are working, with us in a coaching relationship.

Background

How many years has the company been in business?

Does the company have a written operating agreement and/or articles of incorporation?

How many people does the company currently employ?

How many facilities does the company have?

Where are the facilities located?

How many people work at each facility?

How many owners are there?

What are the names of the owners and what percentage of ownership does each have?

Which owners are actively involved in the business and what are their primary roles?

Do the owners have a written succession plan in place?

Aside from the owners, who are the other key people in the company? List each key person and their primary roles.

Does the company have a current organizational chart or an accountability chart?

Has the company worked with an outside consulting firm before? If so, which firm? What were the results?

Is the company still working with an outside consulting firm?

What are the greatest challenges/struggles/problems the company is facing?

What has the company done to address these problems?

Who, if anyone, is held accountable for overall company results?

On a scale of 1-10 (10 is the best), how satisfied are you with where the company is?

If not a 10, what could be done to increase this number?

If you could wave a magic wand and change one thing about the company, what would it be?

Leadership Team

Is there a leadership team in place?

Who is a part of this team?

Who is the leader of this team?

Do you feel the right people are on the leadership team?

How often does the leadership team meet?

Does the leadership team follow a set agenda in its meetings?

Does the leadership team utilize a systematic decision-making process?

How effectively do the members of the leadership team hold each other accountable?

Do the members of the leadership team willingly take on special “over-and-above” projects?

Does the company have a formal strategic planning process?

Does the leadership team discuss strategy? How often? What is the process?

Does the leadership team utilize an outside facilitator to run its meetings?

Does the leadership team meet annually for a strategic planning retreat?

How often do the leadership team and/or owners review the company’s financial statements?

Does the leadership team have a dashboard and/or scorecard?

How effectively does the leadership team identify and anticipate issues?

Financials

What were the company’s total revenues in each of the last three years?

Are the company’s revenues divided into segments?

Does the company have a cash-flow management system?

Does the company or a third-party accountant/bookkeeper produce financial statements?

What accounting software does the company use?

What steps does the company take to protect against fraud or embezzlement?

Does the company create a financial budget each year?

Does the company determine gross profit by division, product/service line, or customer segment?

Does the company determine net marketing contribution by product/service line, or customer segment?

Does the company benchmark its financial performance against industry averages?

Does the company conduct ratio analysis with its financial reports?

Does the company routinely experience delays in invoicing? If so, what causes the delay to occur?

Does the company analyze its accounts receivables weekly or monthly?

Does the company share its financial performance with its employees? If so, partially or fully?

Who, if anyone, is held accountable for the company's financial results?

On a scale of 1-10 (10 is the best), how satisfied are you with the company's financial performance?

If not a 10, what could be done to increase this number?

If you could wave a magic wand and change one thing about the company's finances, what would it be?

Sales

Does the company have a written sales process?

Does the company have current sales goals? What are they?

Does the company track sales activity such as calls, meetings, proposals, sales, etc.?

Does the company track sales results for each step in the sales process? If so, what are they?

What is the company doing to increase sales results?

Does the company track client retention?

What is the company doing to improve client retention?

Who is responsible for client retention? What incentives do they have to increase it?

Does the company know who its most profitable clients are?

What steps does the company take to ensure the satisfaction of its top clients?

Who, if anyone, is held accountable for the company's sales results?

Does each person with sales accountabilities have an updated and prioritized list of prospects?

On a scale of 1-10 (10 is the best), how satisfied are you with the company's sales performance?

If not a 10, what could be done to increase this number?

If you could wave a magic wand and change one thing about the company's sales, what would it be?

Marketing

What analytical tools does the company use to assess its marketing environments?

Does the company have a written marketing process?

Does the company have a current marketing plan?

Does the company track and analyze marketing results?

What makes the company unique in the marketplace?

Does the company segment its markets and select target markets?

Which of the following marketing initiatives are currently being utilized?

- Website
- Internet search engine optimization
- Social media
- Blog
- Email marketing
- Email signatures
- Postcards
- Flyers
- Door-hangers
- Print Yellow Pages
- Online Yellow Pages
- Billboards
- Other outdoor advertising
- Truck signage
- Trailer signage
- Building signage
- Uniforms
- Business cards
- Business letterhead
- Ad specialties (promotional giveaways)
- Printed portfolio
- Electronic portfolio
- Printed brochure
- Electronic brochure
- Telemarketing
- Holiday gifts
- Thank you cards
- Sponsorships
- Public speaking
- Donations
- Service projects
- Charity fundraisers
- Networking groups

- Association involvement
- Referrals
- Testimonials
- Other

Does your company have a marketing budget?

What percentage of your total revenues is spent on marketing initiatives?

Does your company have a stated promise or guarantee?

Who, if anyone, is held accountable for the company's marketing results?

On a scale of 1-10 (10 is the best), how satisfied are you with the company's marketing performance?

If not a 10, what could be done to increase this number?

If you could wave a magic wand and change one thing about the company's marketing, what would it be?

Operations

Does the company have written operational processes?

Does the company track its productivity (productive time divided by total time)?

Does the company track its efficiency (actual time divided by budget time)?

Does the company develop operational budgets or goals?

Are these operational budgets or goals communicated to its front-line people?

Are front-line people held accountable for operational results?

Does the company have a quality control program in place?

Does the company hold regular meetings with its operational staff? How often?

Does the company have a dashboard and/or scorecard for operations?

Who, if anyone, is held accountable for the company's operations?

On a scale of 1-10 (10 is the best), how satisfied are you with the company's operations?

If not a 10, what could be done to increase this number?

If you could wave a magic wand and change one thing about the company's operations, what would it be?

People

How many people are employed by the company?

Do you feel you have the right people in the right seats?

Does the company have a written new-hire process?

How does the company train its new people? Who conducts this training?

What does the company do to promote the professional development of its people?

Does the company have a written evaluation process?

Does the company have a written disciplinary process?

Does the company have a formal process for soliciting feedback from its people?

Does the company offer any type of incentive compensation to its people?

Does the company track turnover rates of its people?

How many people have been hired in the last 12 months? Of these, how many are still employed today?

How many subcontractors does the company work with on a regular basis?

Does the company understand the difference between a subcontractor and an employee?

Does the company require its subcontractors to sign a contractual agreement? If so, does this agreement include a non-compete clause?

Does the company require insurance certificates from its subcontractors?

What steps does the company take to ensure its compliance with State & Federal employment laws?

Does the company have a written incident policy?

Does the company routinely lay off its employees? If so, does it have a written process?

Does the company have a written termination process?

Does the company have a formal safety program?

On a scale of 1-10 (10 is the best), how satisfied are you with the company's people or the management of them?

If not a 10, what could be done to increase this number?

If you could wave a magic wand and change one thing about the company's people or the management of them, what would it be?

Strategy

Describe the culture of the company?

Does the company have written company values?

When were these values decided on?

Are these values still reflective of the company?

Does the company have a mission statement?

When was this mission statement developed?

Is this mission statement still reflective of the company?

Does the company have a long-term (10-20 year) vision statement?

Does every person in the company know the values, mission, and vision?

What analytical tools does the company use to assess its external and internal environments?

What are the company's five-year goals?

What are the company's one-year goals?

Does every person in the company have specific goals and metrics?

Are company results compared to goals?

What occurs when the company exceeds its goals?

What occurs when the company falls short of its goals?

Personal / Leadership

How do you define success?

What are your personal goals?

- Spiritual
- Relational
- Physical
- Emotional
- Social
- Professional
- Intellectual
- Financial
- Educational

Do you have a system for determining your life priorities?

Do you have a time-management and organizational system?

Do you have an advisory team to support you? If so, who is on this team and what are their roles?

How often do you interact with each person on your advisory team?

How do you stay current with global, regional, or local issues and trends?

What percentage of your work time is devoted to promoting the values-mission-vision of the company?

What percentage of your work time is devoted to developing future leaders?

Do you have a spouse? If so, what is their name and how long have you been married?

Do you have children? If so, what are their names and ages?

How far from home do you work?

Do you ever work from home?

What time do you typically leave for work in the morning?

What time do you typically arrive home from work in the evening?

Do you work in the evenings or on weekends? If so, how many hours on average?

What are your hobbies or interests outside of work?

On a scale of 1-10 (10 is the best), how satisfied are you with your personal life?

If not a 10, what could be done to increase this number?

If you could wave a magic wand and change one thing about your personal life, what would it be?

Reflections/Action Steps

After reflecting on your answers to this assessment, what stands out the most to you? Use as much space as necessary to capture your thoughts.

What action steps are you willing to commit to in the next 90 days? We recommend 3-5 commitments.

Are You Ready?

Are you ready to arrange a phone call with us to discuss your situation and how we might be able to help? If so, please contact us via email at growth@mypmcteam.com, fax, or phone.

Thank you, and may God richly bless you and your organization.