

# **2018 YEAR END SELF ANALYSIS WORKSHEET FOR 2019 GOAL SETTING**

As we approach the end of 2018 it is time for a thorough self-analysis and appraisal of your business model. I have prepared this questionnaire to aid you in gauging where you are. Hopefully you can then use this information to see where you need to improve and to formulate the goals and strategies for 2019.

Remember, your business exists for one reason, to provide you a means by which to obtain the things you want in life including an enjoyable and stable retirement.

Respond to each question below by circling "Y" for yes or "N" for no. Be objective and honest with yourself. It will help you see where you really are.

**Jerry Isenhour**

**SECTION 1 / SALES & MARKETING**

#1 Y N Sales goals are established, and we are meeting or exceeding these through effective lead generation and promotions

#2 Y N We have a clearly defined position in the marketplace

#3 Y N We have defined our prime target market, our target customer and the demographics of our clients

#4 Y N We have clearly defined our products and / or services

#5 Y N We have a pricing strategy that is bringing us the profits we set our goals for

#6 Y N We are consistently marketing & retargeting our present customer base

#7 Y N We have an effective method of network & referral marketing

#8 Y N We have a process of thanking those who refer us

#9 Y N We have a written and well executed marketing plan and calendar

#10 Y N We have an effective marketing system that includes both electronic and other proven methods and we track our results.

#11 Y N Our website is effectively working, and we have a social marketing strategy in place

#12 Y N We have a proven and trackable system of collecting the email addresses of our customers and we are using this for ongoing contact & retargeting of our customer base.

#13 Y N We have an effective way to consistently mine our data to refine our market position and to use in developing our marketing programs.

#14 Y N We have an effective drip system for sales follow-ups.

#15 Y N Our website is up to date and has the right messages, look and information to promote our services and products

#16 Y N We are producing a minimum of 2 blogs a month that effectively attract potential customers and utilizing these through social medium

#17 Y N Our phones are answered live always during business hours with voice mail or virtual backup for overload times

#18 Y N Our phone conversations are recorded and analyzed to insure we are providing the proper presentation to each customer

#19 Y N We have an effective method of telephone answering, recording messages and all phone calls are returned in a timely manner

#20 Y N We track the source and origination of each phone call and can track the success rate of our staff members answering the phone (include yourself if you do this)

#21 Y N We have effective scripts that appeal to our target customer and closes appointments/sales for the maximum number of inquiries.

#22 Y N We have a method of recording and reviewing phone calls on a regular basis to make any needed changes to maximize quality and closure of sales

#23 Y N We are effectively capturing internet leads and effectively following up on these in an effective manner.

#24 Y N We have an effective upsell and down sell process

#25 Y N We have an effective process for building relationships and overcoming objections and negotiations

#26 Y N We have an effective process for identifying ongoing and changing customer needs

#27 Y N We have clearly defined sales processes and procedures in place that are working effectively

#28 Y N We respond immediately and effectively to any customer concerns

#29 Y N We have an effective customer management software system in place and understood by all members of the team

#30 Y N We have an effective and active YouTube channel and we are doing videos on a regular basis to promote through this medium

#31 Y N We are looking to expand our video offerings in 2019

#33 Y N Our systems are in place that insure no one on the team is irreplaceable (including myself), and we have the process in place for locating replacements.

#34 Y N We have an effective way of adding sales from customers who leave us voice mail outside of our office hours.

#35 Y N We have a unique selling proposition that is distinctive, clearly defined and implemented consistently.

How many of these activities do you excel in? \_\_\_\_\_

How many are you average in? \_\_\_\_\_

How many do not exist in your operation or need work? \_\_\_\_\_

## MY NOTES ON SALES & MARKETING

### SECTION 2 / OPERATIONS

#1 Y N We have developed a unique customer service experience

#2 Y N We have clearly defined systems and policies that allow our employees to follow our company guidelines but allow them latitude to exceed our customer's expectations.

#3 Y N We have clear-cut and understandable return/refund policies that cover the needs of the company and allow us to keep our customers happy

#4 Y N We consistently review customer feedback and regularly track and monitor data insuring we are exceeding our customer's expectations

#5 Y N We have a daily meeting where tracked results are presented

#6 Y N We consistently and regularly work to insure our team understands and has bought into our mission and core values

#7 Y N We have a tested customer appreciation and thank you process we are happy with

#8 Y N We have an effective documentation and reporting system in place and operable, this system allowing us to monitor our quality and to insure we are meeting our customer's expectations

#9 Y N We have an effective quote system accompanied by a process for ordering, invoicing and data recording which includes photo storage and recall

#10 Y N We have the most effective, up to date, and state of the art tooling and equipment for our technicians

#11 Y N We have regularly scheduled company meetings to share with our staff members how we are progressing and where we need to improve

#12 Y N We have an organized warehouse that is thoughtfully laid and out and maintained insuring there are no excess steps for locating stock and that we minimize waste

#13 Y N We have an effective system in place to locate new members of the team

#14 Y N We have an effective means of vetting potential employees and a fast track training system to quickly bring them up to speed

#15 Y N We have a productive way of evaluating and conveying both individual and company performance to our staff

#16 Y N We have an effective in-house on-going training program that keeps our staff at the top of the local market and industry standards

#17 Y N We have a person in-house who can present effective training on an on-going basis

#18 Y N We have effective waste tracking and are reducing waste by a minimum of 15% each year

#19 Y N We have an effective ride-a-long training program to insure our technicians are aware of all their needs to improvement and where they need to improve

#20 Y N We have identified the traits of an ideal new hire

#21 Y N We know where to recruit new talent from

#22 Y N We have a systematized orientation / onboarding process in place for new hires

#23 Y N We have a 90 day review process systematized into our processes

#24 We have annual reviews scheduled for each member of the team

#35 Y N We have a system for 360-degree feedback in our annual review process

How many of these points do you excel in? \_\_\_\_\_

How many are you average in? \_\_\_\_\_

How many do not exist in your operation or need work? \_\_\_\_\_

MY NOTES ON OPERATIONS

## SECTION 3 / ADMINISTRATION

#1 Y N We track, record and report sales daily by person, profit center, product and service

#2 Y N We have a budget that serves as the financial GPS for the business

#3 Y N We track the source of each sale and customer

#4 Y N We track and report sales closure by day and person

# 5 Y N We have a daily waste reduction goal we track daily in all operations

#6 Y N We track and monitor our financial data weekly and adjust our operations and budget as needed to insure can accommodate all changes in the business climate

#7 Y N Our 2019 budget is in place and ready to implement for the coming year

#8 Y N We have regularly scheduled manager's meetings that are held at the same time each week with an agenda and a way to record results and decisions

#9 Y N We have a cash flow management process that includes payroll, payables, receivables and reserves

#10 Y N We have a plan which includes funding and scheduling our insurance & tax payments built into our budget

#11 Y N We have an exit plan that is supported by our budget, in other words are we seeing the ROI that is required for the exit plan to be realized

#12 Y N We have and regularly review Key Performance Indicators to monitor our company's financial health and progress toward our goals



#13 Y N We measure our financial position at least once a month and can specify why there are variances that we did not predict

#14 Y N We review our legal and insurance exposure on an annual basis to ensure we are properly protected

How many of these areas do you excel in? \_\_\_\_\_

How many are you average in? \_\_\_\_\_

How many do not exist in your operation or need work?

\_\_\_\_\_

MY NOTES ON SECTION 3 / OPERATIONS

## SECTION 4 / LEADERSHIP

#1 Y N We have an effective mission statement that defines my core values and mission which is understood and has buy in from all members of team

#2 Y N I am effective coach of people, a mentor to my staff members and respected by my staff for my leadership skills, they follow me because they truly want to, not because they are required

#3 Y N We have an effective, up-to-date employee handbook

#4 Y N We have a written business plan that includes our vision, marketing plan, sales plan, operating plan, administrative plan, and exit plan that is regularly reviewed and updated each quarter

#5 Y N We have an effective organization chart that covers our operation and avoids overlapping responsibilities

#6 Y N We have daily meetings, weekly management meetings and monthly? company meetings that are scheduled and have an agenda coming in that are properly prepared for

#7 Y N We have an accountability chart & written job descriptions identifying the expectations of each member of the staff

#8 Y N We have an effective and growing operations manual that covers all aspects of our business

#9 Y N We have an effective compensation plan in place that includes a pay and benefits package that create high employee morale and retention

#10 Y N The business can exist and operate without me

#11 Y N The business can be sold at an amount that would be satisfactory to me

#12 Y N I communicate as needed with my coaches, mentors and advisors in a way that assures I am growing as a leader and manager

How many of these do you excel in? \_\_\_\_\_

How many are you average in? \_\_\_\_\_

How many do not exist in your operation or need work?

\_\_\_\_\_

MY NOTES ON SECTION 4 / LEADERSHIP

## SECTION 5 / PERSONAL ANALYSIS

#1 Y N I consider myself an effective leader

#2 Y N If things do not go per plan I look at myself first and do not randomly level blame at others

#3 Y N When there are issues I react to take care of the issue and act to track down and eliminate the source of the problem.

#4 Y N I look for my own weaknesses, I work to combat them and I key on my strengths

#5 Y N I review my team regularly to determine if I have the right people in the right seats, and I work to place my people in the right seat to fit their skills

#6 Y N I am an effective manager of people, I hire at the right pace, I counsel my staff effectively, and I can fire if the need arises

#7 Y N I have determined if I am an implementer or a visionary, and I have someone on my staff or on contract as an outside source to provide the other key ingredient of effective leadership for the company

#8 Y N I have created the right mid-level management team and have surrounded myself with the expertise needed to drive me to my goals

#9 Y N I have budgeted my time properly to devote to both family and business such that one does not rob from the other

#10 Y N I have set the time on my schedule to work *on* the business and am devoting the proper amount of time to excel as a leader

#11 Y N I effectively manage my time to make optimal use of each day

#12 Y N I enjoy my job and derive great pleasure in the work I do

How many of these do you excel in? \_\_\_\_\_

How many are you average in? \_\_\_\_\_

How many do not exist in your operation or need work?

\_\_\_\_\_

NOTES ON SECTION 5 / PERSONAL

HOW DID YOU SCORE?

SALES & MARKETING

EXCEL \_\_\_\_\_ AVERAGE \_\_\_\_\_ NEED WORK \_\_\_\_\_

OPERATIONS

EXCEL \_\_\_\_\_ AVERAGE \_\_\_\_\_ NEED WORK \_\_\_\_\_

ADMINISTRATION

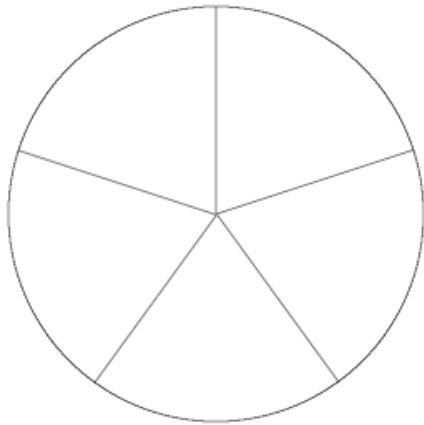
EXCEL \_\_\_\_\_ AVERAGE \_\_\_\_\_ NEED WORK \_\_\_\_\_

LEADERSHIP

EXCEL\_\_\_\_\_AVERAGE\_\_\_\_\_NEED WORK\_\_\_\_\_

PERSONAL

EXCEL\_\_\_\_\_AVERAGE\_\_\_\_\_NEED  
WORK\_\_\_\_\_



# **WHEEL OF SUCCESS**

**IS YOUR WHEEL ROUND?**



The above wheel has the various segments of business that should be reviewed, just like a wheel that may be out of round does not roll well, so does a business that is out of round not roll properly. From the worksheet where do you need to concentrate efforts in 2019 that may be your weak areas.

## HOW TO DRILL DOWN TO PUT TOGETHER YOUR GOALS

HERE ARE SOME OTHER AREAS TO CONSIDER FROM THIS  
SELF EVALUATION:

WHAT AREAS ARE YOU MOST SATISFIED WITH?

IS A MEMBER OF YOUR TEAM HANDCUFFING YOU FROM  
MOVING TO WHERE YOU WANT TO GO?

WHAT AREAS DO YOU FEEL NEED THE MOST WORK?

WHAT AREAS HAVE YOUR MOST COMPLETE FOCUS?

WHAT AREAS NEED INCREASED FOCUS IN 2019?

WHAT TASKS ARE YOU DOING THAT YOU HATE? AND, WHAT HAS KEPT YOU FROM PLACING THESE IN YOUR SUCK BUCKET

WRITE DOWN YOUR GOALS FOR 2019.



WHAT ACCOMPLISHMENTS WOULD YOU LIKE TO ACHIEVE IN 2019?

WHEN, HOW, AND WHY WOULD YOU EXIT FROM THE BUSINESS

WHAT IS MISSING TO MAKE YOUR BUSINESS A TURNKEY OPERATION, SO YOU COULD WALK AWAY AND STILL DRAW A 15 - 20% RETURN WITH SOMEONE ELSE MANAGING THE BUSINESS FOR YOU? COULD YOU SELL THE BUSINESS AT A SIGNIFICANT RETURN ON YOUR INVESTMENT?

WHAT DO YOU WANT TO BE TALKING ABOUT ON JANUARY 1, 2020?

LIST YOUR LEADING THREE FRUSTRATIONS AND YOUR PLAN TO ERADICATE EACH OF THESE IN 2019.

## GOAL SETTING GUIDE

List your goals is the first step in the process, set them lofty but attainable. Then determine how you will measure your progress and track your success. Remember writing them down where you can see them will serve to keep you on track.

From the long-range goals, you have in mind, make sure to set the short-term goals to achieve these. Do these in 60 to 90-day time frames.

Remember, setting goals is not going to provide you the results without a means to measure your progress. Review them often to insure you are on track to reach each of them.

Let's make 2019 the year of record accomplishment. CVC Coaching is here for you and with you, and we look forward to seeing you achieving each one of your goals!

***Jerry Isenhour***