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2024 YEAR END SELF ANALYSIS WORKSHEET FOR 2025 GOAL SETTING

As we approach the end of 2024 it is time for a thorough self-analysis and appraisal of your business model. Our coaching team has prepared this questionnaire to aid you in gauging where you are as you end 2024. Hopefully you can use this information to see where you need to improve and to formulate the goals and strategies for 2025.

Remember, your business exists for one reason, to provide you with 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. I also suggest you ask others who are part of your leadership to also answer the questions and assist with the 2025 goal setting.



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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 working effectively, 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 it in developing our marketing programs.

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



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

#16 Y N We are producing a minimum of 2 blogs, in either a written or video format, a month that effectively attracts potential customers and utilizes these through social media

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

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

#19 Y N We have an effective method of answering telephones, 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



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#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 social media

#31 Y N We are looking to expand our video offerings in 2025

#33 Y N Our systems are in place that ensure 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.

#36 Y N We have implemented an effective chat system to capture more visitors to our website and convert them to customers

#37 Y N We have an effective social media program that promotes our brand on a consistent basis

#38 Y N We have assembled a process of having a second string ready to move into place in the event we lose a player at a critical time

#39 Y N We are actively working to build our authority and expertise in the market that we serve

#40 Y N We are presently working with Artificial Intelligence or taking steps to incorporate this into our operation



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How many of these activities do you excel in? _____
How many are you average in? _____
How many items 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 process where tracked results are presented & daily training is included

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



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#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 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 market for, locate, assess, onboard and train 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



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#19 Y N We have an effective ride-a-long training program to ensure 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 are effectively using both DISC and Color Coding to allow us to understand ourselves and the members of our team in order to provide the best leadership possible

#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

#36 Y N We have the culture in our company that meets our goals and expectations

#37 Y N Our turnover with staff is under 10%

#38 Y N We have a safety plan in place that meets all OSHA requirements

#39 Y N We have a process where all OSHA forms are complied with, this includes our OSHA 300 form if we have 10 or more employees

#40 Y N We are utilizing DISC Behavior Assessment with our exiting team members and with any new hires in the interview process

#41 Y N We are conducting Stay Interviews with our existing customers to track how happy they are in their roles and if they may be considering leaving

#42 Y N We are conducting Exit interviews when someone resigns from the company to see how we can improve our retention



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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 ensure we can accommodate all changes in the business climate

#7 Y N Our 2025 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



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#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

#15 Y N We have a set number of KPIs and we monitor these weekly

#16 Y N We make effective use of our relationship with coaches and outside advisers

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 our core values and mission which is understood and has buy-in from all members of team

#2 Y N I am an 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



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#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 description 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



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SECTION 5 / PERSONAL ANALYSIS

#1 Y N I consider myself an effective leader

#2 Y N If things do not go as planned, 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



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#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 _____



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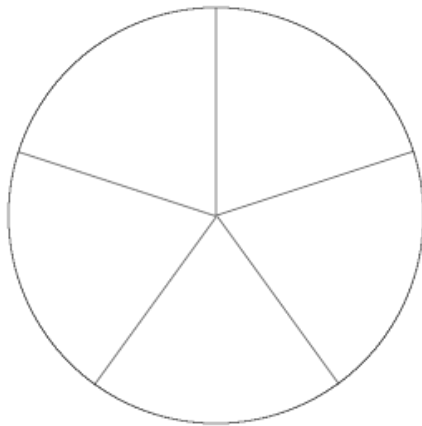
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LEADERSHIP

EXCEL _____ AVERAGE _____ NEED WORK _____

PERSONAL

EXCEL _____ AVERAGE _____ NEED WORK _____



**WHEEL
OF
SUCCESS**

IS YOUR WHEEL ROUND?



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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 does not roll properly. From the worksheet where do you need to concentrate efforts in 2025 that may be your weak areas.



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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?



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WHAT AREAS NEED INCREASED FOCUS IN 2025?

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 2025.

WHAT ACCOMPLISHMENTS WOULD YOU LIKE TO ACHIEVE IN 2025?

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



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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, 2026?



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LIST YOUR LEADING THREE FRUSTRATIONS AND YOUR PLAN TO ERADICATE EACH OF THESE IN 2025.

HOW CAN CVC SUCCESS GROUP BETTER SERVE YOUR NEEDS IN 2025 TO PROVIDE YOU THE MOST VALUE FROM OUR RELATIONSHIP?

GOAL SETTING GUIDE

Reviewing where you presently are is the first step in the process, once you have established your present baseline it is now time to move into the goal setting process. You should 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. I suggest these need to be on a wall near your desk as an ongoing reminder to you.



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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. Set this on your calendar, setting own what will be accomplished by that date.

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

Let's make 2025 a year of record accomplishment. CVC Success Group is here for you and with you, and we look forward to seeing you achieving each one of your goals!

For assistance in putting together your self-analysis and goals feel free to reach out to us at jerry@cvcsuccessgroup.com