

# Soaring Business Effectiveness Evaluation

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

Company: \_\_\_\_\_ Number of Employees (current): \_\_\_\_\_ (prior year): \_\_\_\_\_

The following questions are designed to help you rate your business in various key areas. Read each statement and rate where your business stands today by filling in your level of agreement with the statement from 1 to 10 in the scoring column. Once complete, email this form back to us so we can set up a time to review the results with you.

STRATEGIC PLANNING		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	We ask the Holy Spirit to help us develop/discover our company Vision, Mission, & Values statements that will guide our planning and decision-making processes.	1		10
2.	We have a clearly identified Executive/Leadership team who have the same values involved in strategic planning and implementation.	1		10
3.	We conduct a SWOTT analysis (Strengths, Weaknesses, Opportunities, Threats, Trends) and a PEST analysis (Political, Economic, Social, and Technological) on our business annually.	1		10
4.	We use the results of the SWOTT/PEST analysis to create and prioritize the issues that must be addressed to reach our goals and objectives.	1		10
5.	We ask the Lord for direction as we set and communicate long-term, mid-term, short-term, and milestone goals to achieve our vision.	1		10
6.	We seek God in helping us determine the best strategies to achieve our goals and objectives.	1		10
7.	We align our strategies with God's will to determine the specific actions/tactics. Each is assigned to owners, deadlines, resources required, etc.	1		10
8.	We measure progress on a regular basis and hold responsible parties accountable to fulfill actions/tasks.	1		10
9.	We regularly meet with the leadership team to pray about the business, personal issues, and the country. We consider our work as worship.	1		10
10.	We seek the Lord and the services of trusted advisors to help us with our strategic planning.	1		10

MARKETING		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	We view marketing as an opportunity to expand our territory in reaching people for Christ. It is an investment in other people's lives and our business, and not an expense.	1		10
2.	We use specific marketing tactics and strategies for prospective, current, and past customers. Each connection can be a divine appointment.	1		10
3.	We effectively describe how we are different in ten words or less. We use clear language and not industry jargon in describing our business, products, and services.	1		10
4.	We communicate the benefits of our products/services in a clearly understood manner that others are attracted to. We relate our benefits to match our ideal customers' and clients' needs.	1		10
5.	What we offer is so dramatically different that our ideal clients or customers are looking for us. They are already looking for what we offer. They have done their research before we connect with them.	1		10
6.	We communicate clearly why a prospective buyer should believe us (such as the use of testimonials, case studies, guarantees, etc.).	1		10
7.	We have clearly defined our ideal client, customer, and target market. They are able to embrace our vision, mission, and values and want to know more.	1		10
8.	We use the most effective marketing strategies and tactics to get our message in front of our target market. Our methods are ethical and presented with integrity.	1		10
9.	We maintain a current effective marketing plan, including a calendars, budgets, etc. We have strategies in place for social, networking, and personal marketing.	1		10
10.	We track the return on investment of all our marketing strategies and tactics. Our ROI is not always based on monetary results. We strive to reach the lost where we can.	1		10

SALES		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	We see each sales conversation as a divine appointment to tell them about Christ and how He can be their personal saviour too.	1		10
2.	We communicate clearly our process and the possible outcomes of each sales conversation. What will it be like after the sale.	1		10
3.	Our consultative sales questioning discovers and quantifies the pain points that our prospects want to eliminate and pleasure points they want to increase.	1		10
4.	We ask what our prospects' budget ranges are before we issue any proposals. We have different service or product levels.	1		10
5.	We know that NO can mean Not now. We are able to overcome objections, when necessary. We followup as many as 10 times with a prospect using different communication methods.	1		10
6.	Prior to making a formal presentation of our products/services, we get a verbal commitment from our prospects to buy (assuming that our solution meets their needs).	1		10
7.	Our salespeople sell "value" instead of selling "price." We know the value we provide is beyond our understanding many times.	1		10
8.	We produce regular sales forecasts that are accurate and dependable for making business decisions. We know that our plans may not be God's plans. God is in control.	1		10
9.	When our sales people say a sale will close, I can be hopeful that it will close. We know that nothing is for certain.	1		10
10.	Our salespeople regularly pursue ideal clients or customers and seek referrals in order to keep the sales pipeline full. They ask current clients what else they can help with.	1		10

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CUSTOMER SERVICE		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	We deliver (produce) our products/services on time or over deliver and follow the promises made by the sales or service teams. We go the extra mile.	1		10
2.	Our customer service always meets or exceeds our customers' expectations. We value our clients and customers as they are made in the image of God, just like us.	1		10
3.	We have a consistent, repeatable process for delivering great customer service. We know that all customer interactions are a reflection of our commitment to be different than the world.	1		10
4.	Our offices/facilities are always maintained in a condition that reflect our commitment to letting our light shine in this world. We don't hide it under a bushel.	1		10
5.	Our employees share our company core values, mission, and purpose. They are engaged and responsive to customer concerns. They maintain a professional appearance and demeanor.	1		10
6.	We consistently deliver on time, and in instances where we are not on time, we notify our customers immediately. We want loyal customers and clients.	1		10
7.	We quickly resolve customer dissatisfaction. We want satisfied customers and clients. We value each one. We ask for forgiveness and don't make excuses.	1		10
8.	We have a formal customer or client appreciation program designed to enhance our customers' or clients' experience with us.	1		10
9.	We survey our customers regularly to determine how we are performing. We ask what other products or services they are looking for. If we don't have what they need, we will refer them to someone who does.	1		10
10.	Based on our customers' or clients' feedback, we consistently assess and improve our systems and products/services to better meet their needs. We value their input.	1		10

HUMAN RESOURCES		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	We are "slow to hire and quick to fire." We diligently select people who connect with our business mission and values.	1		10
2.	We use an effective and formalized hiring system. Our hiring system includes concise information on our business culture. We review our hiring process frequently.	1		10
3.	All employees read, understand and sign off on our policies and procedures as stated in our Employee Manual. Our Employee manual states our vision, mission, and values.	1		10
4.	We perform periodic (at least annually) audits of our Employee Manual to ensure compliance with labor laws.	1		10
5.	We have clear written job descriptions for every position within the company. Each employee signs a statement of agreement with the job description and Employee Manual.	1		10
6.	New hires are effectively trained in a systemized process and all staff members are provided with ongoing training and cross-training. New hires are exposed to other areas of the business to develop collaboration.	1		10
7.	We provide timely feedback to employees on their performance, and conduct formal evaluations on a regular basis. We encourage team members to meet regularly (individually and as a team) with their supervisor.	1		10
8.	We conduct regularly scheduled staff meetings that are highly effective. We include staff in celebrating the business success and addressing any failures quickly.	1		10
9.	Our employees are highly motivated and love coming to work. We help them to be engaged with the business by spending time asking them open-ended questions with curiosity.	1		10
10.	We are confident that our benefits and compensation plans are competitive. We routinely evaluate how we compare to our competitors. We ask our employees why they stay at our company.	1		10

BUSINESS SYSTEMS		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	As the owner of the business, I fully understand that my primary role is to ensure that the business is run by effective systems (step-by-step processes). We regularly evaluate how we can improve our systems and processes.	1		10
2.	All of the functions necessary to successfully run our company have been clearly identified and documented in our company operations manual.	1		10
3.	All documented functions are assigned to departments and/or groups within the company. Not one single person is responsible for a function so that we can continue on when someone leaves the business.	1		10
4.	Employee roles and responsibilities that support the business functions are clearly defined and followed. We review any changes that need to be made as the business grows and changes.	1		10
5.	We regularly consider viable outsourcing options if they reduce expenses and increase efficiencies. We know that at times an outsourced option can be more experienced in a specific area of our business.	1		10
6.	All systems are fully implemented and followed and any exceptions are immediately addressed. We follow a documented quality assurance methodology before any changes to our systems are implemented.	1		10
7.	We use up-to-date current technology solutions and ensure that all of our systems are compatible. We are not always the first one to implement a new solution.	1		10
8.	We regularly review our systems to ensure they are as efficient and effective as practical in delivering the desired outcome. We have a documented and effective security solution in all of our systems.	1		10
9.	I'm confident that my employees would know what to do if the leadership team or I were not present for an extended period of time. I am confident that the business can run without me.	1		10
10.	We periodically survey our employees, customers, and suppliers to discover opportunities to improve our systems. We periodically assess our suppliers for on time delivery and responsiveness to our requests.	1		10

EXIT / SUCCESSION PLANNING		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	The vision for my business includes a documented exit or succession strategy. I have shared this with my leadership team so they know how the business will continue on without me.	1		10
2.	I have a clear picture of where my company will be in three, five, and ten years from now. I review this picture periodically (at least annually, preferably every 90-180 days).	1		10
3.	I have an exit or succession plan that considers my family members, leadership team, and key employees. Everyone in the company knows that I think of them as a family.	1		10
4.	I have developed a concise strategic plan for my business that supports my exit or succession plan. I seek God's wisdom in planning so that my plan and His plan are congruent.	1		10
5.	I have a strong sense of the market value of my business based on at least one of the normally accepted practices for business valuations. I seek to increase the value by making the business less about me.	1		10
6.	If an outside buyer wanted to purchase my company today, I would get the maximum value for it. If someone inside the business wanted to purchase it and I know they value the business, I will be open to negotiation.	1		10

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EXIT / SUCCESSION PLANNING cont.		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
7.	A large part of the value of my company is NOT dependent upon my own unique skills, experience, and/or relationships. The business is not named after me and if it is I will pursue a name change.	1		10
8.	In the event of an emergency requiring me to leave the company, I have the correct amounts and types of insurance and an immediate succession plan in place that will protect my family and my company.	1		10
9.	I have a clear picture of what my life will be like after I leave the business. I am confident that I have an abundant life outside of the business. My life is more than my business.	1		10
10.	I have a team of professionals who have assisted in developing my exit and succession plan. The plan addresses my family estate and financial stewardship.	1		10

FINANCIAL MANAGEMENT		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	Our financial statements (including balance sheet and income statement) are current. We track yearly and monthly comparisons to previous years. We also include accounting ratios in our evaluations.	1		10
2.	We understand our financial statements and review them regularly (at least monthly). We periodically evaluate our financial status during a month.	1		10
3.	We use our financial statements as decision-making tools. We use our financial resources effectively by tracking our cash flow. We know what we have outstanding at all times.	1		10
4.	All members of our leadership team use validated Key Performance Indicators (KPIs) to actively manage the business. We evaluate our KPIs regularly to see if they are still valid.	1		10
5.	We understand and forecast our cash position to easily meet the demands of our business. We forecast our income based on past experience and current trends.	1		10
6.	We maintain frequent interaction with our accountant, banker, and other financial professionals to ensure we are using financial best practices. We have trusted advisors that help us to be good stewards of our financial resources.	1		10
7.	We price our products/services to what the market will bear to maximize our profitability. Our pricing is based upon the value we provide. We strive to provide the best value for our customers and clients.	1		10
8.	All variable expenses (Costs of Goods Sold) are at their lowest point practical to ensure our highest gross margin. We know what our minimum gross profit is for each product and service we provide.	1		10
9.	We have appropriate financial controls in place (including budgets and revenue forecasts) to ensure the proper allocation of our resources. Our budgets and forecasts are not inflated or unreasonable.	1		10
10.	We use consistent benchmarking and financial ratios to compare ourselves to our own past performance and to others in our industry.	1		10

LEADERSHIP		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	Each member of our leadership team, including myself, leads by example in pursuing the company's Vision, Mission, and Values and we ensure that our team is doing the same.	1		10
2.	I am disciplined in overseeing the communication and execution of our strategic plan. I periodically review the Vision, Mission, and Values of the business with employees and leadership teams.	1		10
3.	I exhibit a high level of integrity in my words and my actions at all times. I value others more highly than myself. I seek to be humble and honest in all my dealings with customer, clients, and employees.	1		10
4.	I follow through on my commitments to others. I ask others what would make their position more enjoyable. How can I help them?	1		10
5.	I communicate clearly with my team and listen to their feedback. I entertain their ideas and do not respond negatively. I will ask them how we can take action on their idea. Is it a viable solution and what will be the outcome or result?	1		10
6.	I make decisions quickly. I do not procrastinate on a decision and if needed I ask for clarification so that I can make an educated decision. I ask the Holy Spirit for guidance with decisions.	1		10
7.	I show personal respect and concern for our team members. I demonstrate compassion and empathy when needed. I pray for my team members and any issues that I know they are dealing with.	1		10
8.	I am never surprised when an employee resigns. I know that God has something else or better in mind for them. If I try to influence their decision, I am preventing them from experiencing what God has for them.	1		10
9.	I am actively involved in training, mentoring, and coaching leaders within my organization. They know that they can come to me when they have a concern. I will listen to understand.	1		10
10.	I believe that any failure in my business is directly related to my own leadership. I invest in the continued development of our team leaders. I am open to leadership coaching and training the next generation of leaders.	1		10

PERSONAL EFFECTIVENESS		<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
1.	I have a personal vision, mission, and values statement for my life. I strive to embrace the abundant life that God has for me. He has a plan and a future for me.	1		10
2.	I set SMART goals (Specific, Measurable, Achievable, Results, Time) and/or HARD goals (Heartfelt, Animated, Required, Difficult) and pursue them daily. My goals are motivating to me.	1		10
3.	I am personally responsible for all my actions and accountable for all of my results. I don't make excuses or blame someone else. I am accountable to God and I am a reflection of Jesus.	1		10
4.	I am active in improving my overall health and fitness. I find the time to exercise regularly. I eat healthy and refrain from fast food.	1		10
5.	I set aside time for prayer, bible reading, and meditation on His word daily. I listen to music that gives glory to God. My work is also my worship.	1		10
6.	I am aware of how my emotions impact my actions, decisions, and relationships. I seek clarity and counsel that helps me understand and evaluate without emotional connection.	1		10
7.	I have a strong network of family and friends that I spend quality time with and enjoy regularly. We lift each other up and would do anything for each other.	1		10
8.	My personal finances, retirement plans, insurance and estate planning are in order. I seek to be the best steward I can of what God provides for me and my family.	1		10
9.	I have a good balance of work, play, and rest. I take time away from the business to enjoy life and to connect with my family frequently.	1		10
10.	I diligently set aside time for the things I need to get done. I effectively prioritize my tasks and responsibilities. I seek people who are skilled at tasks that I am not.	1		10

*Thank you for taking the time to fill out your Business Effectiveness Evaluation!*

The final step is to email us this questionnaire to