

take control of your  
business for success

## **a comprehensive needs assessment for business owners**

Name : \_\_\_\_\_

Company : \_\_\_\_\_

Date : \_\_\_\_\_



## **Immediate Action**

Rank these key areas of business where you see the most urgent need for change or improvement.  
(Rank in an A,B,C,D,E order with A being most important.)

- ( ) Organization
- ( ) Management development
- ( ) People management and accountability
- ( ) Sales development and sales management
- ( ) System development and better controls

## **Leadership/Executive Skills**

This list addresses the importance of your self-development as the leader, planner, and chief decision-maker. Indicate your choice of the top four items you would work on, if you had plenty of time.

Check up to four --- **only four**.

- ( ) Developing subordinates
- ( ) Evaluating performance
- ( ) Making decisions
- ( ) Using feedback
- ( ) Developing inter-personal relations
- ( ) Improving goal setting and planning
- ( ) Impact on others
- ( ) Improving delegation
- ( ) Problem solving
- ( ) Defining and clarifying roles
- ( ) Improving team effort
- ( ) Getting solid input from key employees



## Business Priorities

Rate the following as to where you would like to see improvement regarding the business.

Scale is:

- 4 very important
- 3 important
- 2 slightly important
- 1 not certain
- 0 does not apply

### Importance To You

- |     |  |   |   |   |   |   |
|-----|--|---|---|---|---|---|
| 1.  | More sales/higher profitability.                   | 0 | 1 | 2 | 3 | 4 |
| 2.  | Less costly mistakes.                              | 0 | 1 | 2 | 3 | 4 |
| 3.  | Better or more product/service.                    | 0 | 1 | 2 | 3 | 4 |
| 4.  | Employees focused on customers.                    | 0 | 1 | 2 | 3 | 4 |
| 5.  | Develop stronger managers.                         | 0 | 1 | 2 | 3 | 4 |
| 6.  | Develop a 12 to 18 month growth plan.              | 0 | 1 | 2 | 3 | 4 |
| 7.  | Clarify the thinking and unity of your top group.  | 0 | 1 | 2 | 3 | 4 |
| 8.  | More consistent results.                           | 0 | 1 | 2 | 3 | 4 |
| 9.  | More employee involvement, cooperation and caring. | 0 | 1 | 2 | 3 | 4 |
| 10. | Other: _____                                       |   |   |   |   |   |
|     | _____  |   |   |   |   |   |
|     | _____  |   |   |   |   |   |



## Sales and Marketing Development

Rate the following as to where you would like to see improvement regarding the business.

Scale is:

- 4 very important
- 3 important
- 2 slightly important
- 1 not certain
- 0 does not apply

### Importance To You

- |     |   |   |   |   |   |   |
|-----|---|---|---|---|---|---|
| 1.  | Upgrading the performance of the sales force.       | 0 | 1 | 2 | 3 | 4 |
| 2.  | Creation of a goals-centered sales plan.            | 0 | 1 | 2 | 3 | 4 |
| 3.  | Position the firm for the future.                   | 0 | 1 | 2 | 3 | 4 |
| 4.  | A motivational way to train salespeople.            | 0 | 1 | 2 | 3 | 4 |
| 5.  | Develop a stronger sales manager.                   | 0 | 1 | 2 | 3 | 4 |
| 6.  | Improve how sales people are hired/qualified.       | 0 | 1 | 2 | 3 | 4 |
| 7.  | Create a true customer service mindset/process.     | 0 | 1 | 2 | 3 | 4 |
| 8.  | Determine major account strategy.                   | 0 | 1 | 2 | 3 | 4 |
| 9.  | Create a selling system and manage it (not people). | 0 | 1 | 2 | 3 | 4 |
| 10. | Develop higher sales standards for all salespeople. | 0 | 1 | 2 | 3 | 4 |



## Management and Organization Development

For each of the following areas of management and organization development, rate the various areas as to importance to you.

Scale is:

- 4 very important
- 3 important
- 2 slightly important
- 1 not certain
- 0 does not apply

### Importance To You

1.	More time to spend working on the business.	0	1	2	3	4
2.	An operation where everyone knows their accountabilities.	0	1	2	3	4
3.	More effective decision making, better decisions.	0	1	2	3	4
4.	A process for hiring or promoting the right people.	0	1	2	3	4
5.	A process for enforcing company policies while keeping spirits high.	0	1	2	3	4
6.	A way to improve communication across the company.	0	1	2	3	4
7.	Job descriptions for every position with pinpoint accountabilities.	0	1	2	3	4
8.	A unified approach to performance management, development and results for all lead people.	0	1	2	3	4
9.	Develop a better way to identify the true issues and opportunities facing the business.	0	1	2	3	4
10.	Develop 30, 60 and 90-day performance targets to provide direction and maintain momentum.	0	1	2	3	4



## People Development & Accountability

For each of the following areas of people development, rate the various areas as to importance to you.  
Scale is:

- 4 very important
- 3 important
- 2 slightly important
- 1 not certain
- 0 does not apply

### Importance To You

- |     |   | 0 | 1 | 2 | 3 | 4 |
|-----|---|---|---|---|---|---|
| 1.  | Improving employee morale   | 0 | 1 | 2 | 3 | 4 |
| 2.  | Developing a results-oriented culture.  | 0 | 1 | 2 | 3 | 4 |
| 3.  | Creating a more practical way to evaluate<br>employee performance.                                  | 0 | 1 | 2 | 3 | 4 |
| 4.  | Establishing a solid relationship between employees<br>and managers.                                | 0 | 1 | 2 | 3 | 4 |
| 5.  | Creating a method to terminate employees without<br>the emotionalism.                               | 0 | 1 | 2 | 3 | 4 |
| 6.  | Interviewing, evaluating and selecting employees who<br>will best meet job demands.                 | 0 | 1 | 2 | 3 | 4 |
| 7.  | Creating a climate of high employee responsibility<br>and accountability for their own performance. | 0 | 1 | 2 | 3 | 4 |
| 8.  | Eliminating conflict.   | 0 | 1 | 2 | 3 | 4 |
| 9.  | Increasing employee involvement and commitment to<br>the changes you need to make.                  | 0 | 1 | 2 | 3 | 4 |
| 10. | Reduce/eliminate the "disconnects" between<br>departments and individuals.                          | 0 | 1 | 2 | 3 | 4 |
| 11. | Increase performance standards and still keep morale<br>high.                                       | 0 | 1 | 2 | 3 | 4 |



## Personal Priorities

How important is it to improve in each of the following areas:

Scale is:

- 4 very important
- 3 important
- 2 slightly important
- 1 not certain
- 0 does not apply

		Importance To You				
		0	1	2	3	4
1.	Be able to do more with my family.	0	1	2	3	4
2.	Improve the focus and direction as to where the business is heading.	0	1	2	3	4
3.	Live a more authentic life and still run this business.	0	1	2	3	4
4.	Develop self as a stronger, more effective leader of people.	0	1	2	3	4
5.	Build better relationships.	0	1	2	3	4
6.	Gain more fulfillment, personal success and satisfaction through my business.	0	1	2	3	4
7.	Make more money and enjoy it.	0	1	2	3	4
8.	Have more time for other interests, pursuits.	0	1	2	3	4
9.	Gain better control over the business without being fried by overwork and stress.	0	1	2	3	4
10.	Continue to grow and develop as a person.	0	1	2	3	4
11.	Have the independence to do things the way I want to do them.	0	1	2	3	4
12.	Re-discover my passion, purpose and energy.	0	1	2	3	4

