



Strategic Business Assessment

PRESENTED BY:

CPC.

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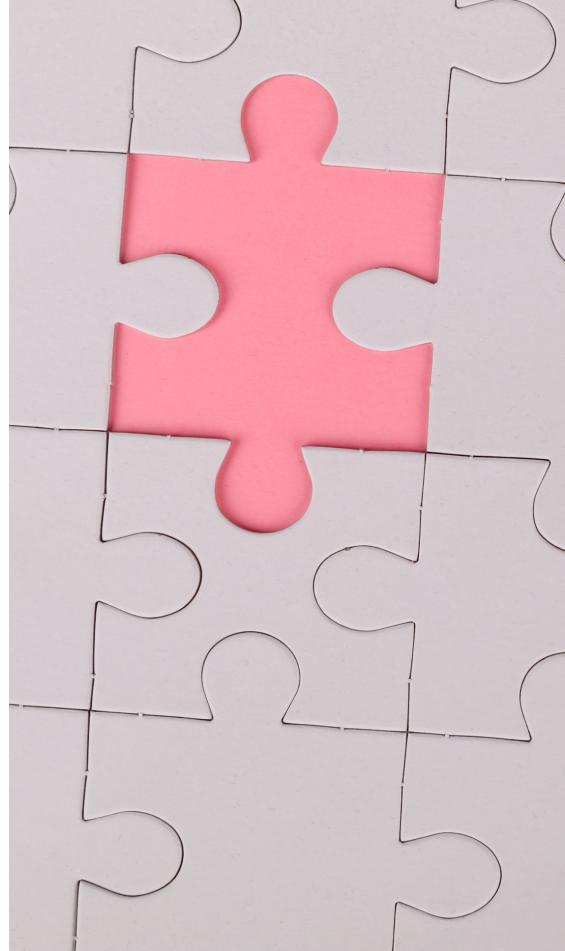
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What is a Strategic Business Assessment

A Strategic Business Assessment is a comprehensive evaluation of a company's current performance, market position, and long-term potential. This process involves analyzing key areas such as operations, financial health, competitive landscape, and customer insights. By identifying strengths, weaknesses, opportunities, and threats (SWOT), it provides a clear picture of where the business stands and what strategic adjustments are needed. The assessment helps inform decision-making, guiding organizations toward more effective strategies and optimized growth. Ultimately, it ensures that the business is aligned with its goals and positioned for sustainable success in a dynamic market.

VISION MISSION VALUES

Meeting 1



Vision

The vision defines your long-term goals, guiding strategies and decisions. CPC will help you shape a clear, inspiring vision, focusing on growth and opportunity to align your business toward future success.

Values

Values are the principles guiding decisions and actions. CPC will help identify core values that ensure ethical, transparent practices and align your business culture for sustainable, long-term success.

Mission

The mission outlines the steps to achieve your vision. CPC will help clarify your company's purpose, providing a practical roadmap to solve challenges and reach your business goals effectively.

CORE BUSINESS DISCUSSION

Meeting 2

Goals

- Personal Goals
- Business Goals
- Values to meter your business and professional goals

Core Business

- What do you do?
- How do you do it
- What do you need to do it?
- Customer Persona(s)
- Identify your competitive set
- Direction you want to take your business
- What you need to get there
- Who you need to get there.

Operations

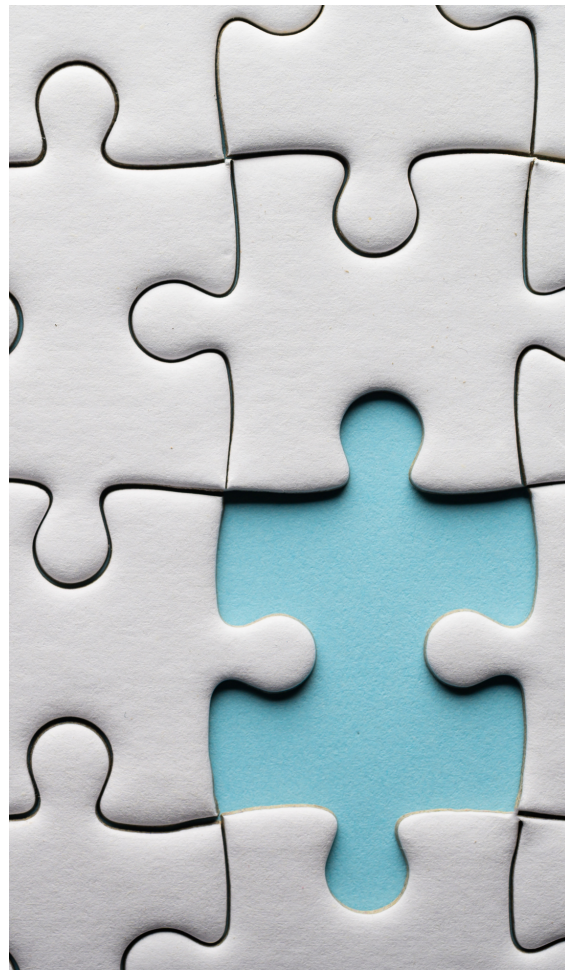
- Review and/or create an Organizational Chart
- Review and/or create an Accountability Chart
- How you want to run your business, and what you aspire to do when stabilized

Marketing / Sales

- Who does Sales and Presentations
- What Marketing collateral do you have and use
- Website and Social Media usage
- Sales Efforts

CPC will conduct a discussion that involves a deep dive into the essential elements that drive a company's success. This process aims to identify key strengths, challenges, and opportunities within the business.

The goal is to gain a clear understanding of the business's current state and chart a focused path forward that enhances overall performance and growth.



FINANCIAL

Meeting 3



Financial Reporting and Performance Tracking

- Who does your Financial Budgeting and Projections, and how do they do them
- Who does your bookkeeping
- Who review financial reports and keeps business in line.

Financial Review / Performance and Capital Stack

- Review historic Financial Data
- Budgets and projections,
- Understand Assets to create a Capital Budget for Expansion
- Facility – Rent, Own
- Business Growth Strategy

S.W.O.T. ANALYSIS

Meeting 4

Strengths



A SWOT Analysis is used to help identify ways to improve and maximize opportunities, while also identifying negative factors that could hinder success.

SWOT stands for:

Strengths - What the business does well, what unique resources it has, and what others see as its strengths

Weaknessess



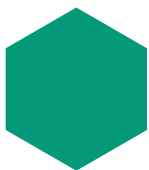
Weaknesses - What could be improved, where the business has fewer resources than others, and what others might see as weaknesses

Opportunities



Opportunities - What opportunities are available, what trends could be taken advantage of, and how strengths can be turned into opportunities

Threats



Threats - What threats could harm the business, and what the competition is doing

DELIVERABLE

Meeting 5

Presentation

- Analysis
- Results
- Recommendations
- Future Steps



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