

Business Success Evaluation Survey

Instructions: Rate each statement on a scale of 1 to 4, where: 1 = Needs Immediate Attention 2 = Needs Focus 3 = Adept 4 = Business Leader

Leadership

Our company has a clear and well-communicated Mission and Purpose statements.

- ☐ 1: No Mission or Purpose statements exists.
- ☐ 2: Mission and Purpose statements exists but is not widely known or used.
- ☐ 3: The Mission and Purpose statements are understood and somewhat applied.
- ☐ 4: The Mission and Purpose statement is a guiding force in daily business decisions.

Leadership fosters a strong company culture that aligns with our values.

- ☐ 1: Culture is undefined and inconsistent.
- ☐ 2: Leadership promotes a vision, but it is not deeply ingrained.
- ☐ 3: Culture is strong but requires reinforcement.
- ☐ 4: Culture is a core part of the organization's identity.

Leaders demonstrate a commitment to personal development and growth.

- ☐ 1: Leadership development is not encouraged.
- ☐ 2: Limited leadership growth initiatives exist.
- ☐ 3: Personal development is supported and promoted.
- ☐ 4: Leadership development is a priority with structured programs.

Goals are clearly defined and easily communicated to the team. Team members are also able to easily look up or recall goals.

- ☐ 1: Goals are not existent inside of the organization.
- ☐ 2: Goals are only known to me or my top management team.
- ☐ 3: Goals are clearly defined but team members have a hard time finding the information
- ☐ 4: Goals are clearly defined, constantly evaluated, and team members can easily find or recall the goals.

Team Investment

Communication channels within our company are effective and efficient.

- ☐ 1: Communication is unclear and inconsistent.
- ☐ 2: Some communication structures exist, but they are not effective.
- ☐ 3: Communication is generally strong but needs minor improvements.
- ☐ 4: Communication is seamless and fosters collaboration.

Employees are empowered to make decisions and take initiative in their roles.

- ☐ 1: Employees lack autonomy and decision-making power.
- ☐ 2: Limited decision-making is allowed for employees.
- ☐ 3: Employees have moderate autonomy.
- ☐ 4: Employees are fully empowered and take initiative.

Conflict resolution strategies are in place and successfully implemented.

- ☐ 1: No conflict resolution process exists.
- ☐ 2: Conflict is handled reactively with no clear plan.
- ☐ 3: A structured process exists but is inconsistently applied.
- ☐ 4: Conflict resolution is proactive and effectively managed.

Employee engagement and satisfaction are measured and acted upon.

- ☐ 1: No employee engagement measurement exists.
- ☐ 2: Engagement is measured, but action is not taken.
- ☐ 3: Engagement is tracked, and some initiatives exist.
- ☐ 4: Engagement is a key priority with effective initiatives.

Customer Perspective

We actively monitor customer engagement and experience to improve services.

- ☐ 1: Customer feedback is not collected.
- ☐ 2: Feedback is collected but rarely acted upon.
- ☐ 3: Feedback is used to make some improvements.
- ☐ 4: Customer engagement drives continuous business improvement.

Our marketing aligns with our company culture and purpose.

- ☐ 1: Marketing does not reflect company values.
- ☐ 2: Some alignment exists, but messaging is inconsistent.
- ☐ 3: Marketing is generally aligned with company culture.
- ☐ 4: Marketing fully supports and reinforces company values.

Customer feedback is regularly collected, and processes are implemented for service improvement.

- ☐ 1: No formal feedback process exists.
- ☐ 2: Feedback is collected but not used effectively.
- ☐ 3: Feedback influences some process development.
- ☐ 4: Customer feedback is a central part of our improvement strategy.

Customer service policies reflect our company mission and purpose statements.

- ☐ 1: No customer service policies exist.
- ☐ 2: Policies exist but are inconsistently followed.
- ☐ 3: Policies are applied but could be improved.
- ☐ 4: Customer service is a defining strength of the business.

Analytical Insights

Business decisions are made based on accurate and reliable data.

- ☐ 1: Decisions are made without data consideration.
- ☐ 2: Some data is used but inconsistently.
- ☐ 3: Data is regularly considered in decision-making.
- ☐ 4: Data-driven decisions are a core business practice.

Key performance indicators (KPIs) are tracked and analyzed to measure success.

- ☐ 1: No KPIs are defined or tracked.
- ☐ 2: KPIs exist but are not consistently reviewed.
- ☐ 3: KPIs are tracked and used in some decision-making.
- ☐ 4: KPIs are fully integrated into business strategy.

Positive and negative insights are communicated transparently.

- ☐ 1: Communication lacks transparency.
- ☐ 2: Some insights are shared but inconsistently.
- ☐ 3: Information is mostly clear but could improve.
- ☐ 4: Insights are openly and transparently shared.

Business data is always considered within the right context before making decisions.

- ☐ 1: Data is used without context.
- ☐ 2: Some context is considered but not always.
- ☐ 3: Data context is mostly evaluated.
- ☐ 4: Decisions are always made with full data context

Adaptation & Implementation

Our company effectively translates data insights into actionable business strategies.

- ☐ 1: Insights are collected but not used.
- ☐ 2: Some strategies are informed by data.
- ☐ 3: Data-driven strategies are often implemented.
- ☐ 4: Business strategies are consistently refined through data analysis.

Employees are encouraged to innovate and contribute ideas for improvement.

- ☐ 1: Innovation is not encouraged.
- ☐ 2: Some employees contribute ideas occasionally.
- ☐ 3: Innovation is moderately supported.
- ☐ 4: A culture of innovation is fully integrated.

When reviewing data, my team and I always ask the "why" behind the data.

- ☐ 1: "Why" is never asked.
- ☐ 2: "Why" is only asked for more serious matters related to data sets.
- ☐ 3: "Why" is asked most of the time, unless it seems obvious to the leaders
- ☐ 4: "Why" is ingrained into every piece of data, including good and bad data

Financial Translation

Business performance is measured in 30, 60, and 90-day intervals.

- ☐ 1: No structured performance measurement exists.
- ☐ 2: Some performance tracking occurs, but irregularly.
- ☐ 3: Performance is measured regularly.
- ☐ 4: Structured performance analysis is a business priority.

Financial decisions balance short-term gains with long-term business growth.

- ☐ 1: Focus is only on short-term gains.
- ☐ 2: Long-term growth is considered but not prioritized.
- ☐ 3: A balance exists between short-term and long-term financial goals.
- ☐ 4: Financial planning is strategic and sustainable.

Financial success is clearly defined, and results are communicated to the team for clarity.

- ☐ 1: Financial success is not defined at all.
- ☐ 2: Financial success is loosely defined but there is no set standard
- ☐ 3: Financial success is clearly defined but communication for clarity needs improvement
- ☐ 4: Financial success is clearly defined, and effective communication is in place

Cost control initiatives are in place to ensure financial success is easily achieved.

- ☐ 1: Cost control initiatives do not exist
- ☐ 2: Cost control initiatives have been talked about with management
- ☐ 3: Cost control procedures are implemented but could be improved
- ☐ 4: Cost control procedures are fully implemented and ingrained into each position inside the business.

Reinvestment

Our company reinvests in both employees and business growth.

- ☐ 1: No reinvestment occurs.
- ☐ 2: Minimal reinvestment happens occasionally.
- ☐ 3: Reinvestment is planned but inconsistent.
- ☐ 4: Reinvestment is a fundamental part of business growth.

Employees feel valued and engaged, leading to increased productivity and loyalty.

- ☐ 1: Employees feel undervalued.
- ☐ 2: Some employees feel valued, but engagement is low.
- ☐ 3: Most employees feel valued and engaged.
- ☐ 4: Employee satisfaction is a defining strength of the business.

Investment in technology and innovation is prioritized for business efficiency.

- ☐ 1: Technology and innovation have not changed in recent years.
- ☐ 2: Technology and innovation come and go as certain individuals leave.
- ☐ 3: Technology and innovation are evaluated every few years to help grow.
- ☐ 4: Technology and innovation are key components of the business and are constantly adapting to the business environment.

Continuous training and professional development programs are available.

- ☐ 1: Training and development programs do not exist.
- ☐ 2: Training is implemented for new hires but nothing beyond.
- ☐ 3: Training and development are present in the business, but a growth track is not present.
- ☐ 4: Training and development are cornerstones of the business, and a growth track is defined inside of the business.

Scoring & Evaluation:

Add up your scores based on the number that you filled in for each question. Then add up your total score and see where you fell on the ranking scale.

Total Scores:

Leadership Total: _____

Talent Investment: _____

Customer Perspective: _____

Analytical Insights: _____

Adaptation and Implementation: _____

Financial Translation: _____

Reinvestment: _____

Total Score: _____

Final Assessment:

- **Needs Immediate Attention 7-10 total points (4-6 section points)** – Your business requires immediate improvements in multiple areas. Focus on foundational changes. We recommend starting with our framework program and work your way up from there. If its just a specific section, we recommend diving into our focus area pertaining to your area of struggle.
 - **Needs Focus 11-17 total points (7-9 section points)** – There are key areas that need development to ensure long-term success. You are laying the correct foundation, now let's focus on defining all the areas and how to implement them. You may want to start with our framework program or dive into the specific areas that you are struggling with to have a quicker impact.
 - **Adept 18-24 total points (10-12 section points)** – Your business is performing well, but there is room for improvement and optimization. A slight refocus on specific areas will take your business to the next level. Effective Communication is the key to taking your business to the next level. Take a look at our deep dives and determine which topic would best fit your needs.
 - **Business Leader (12-16 section points)** – Your business is excelling and demonstrating strong leadership and success principles. You are an example to other businesses and are paving the way for others to follow. You can still work with us to see if there is a new level to unlock beyond where you currently are.
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