

SMALL BUSINESS STRATEGIC BUSINESS ASSESSMENT

UNLOCK YOUR GROWTH
POTENTIAL THROUGH
STRATEGIC CLARITY

If your business is caught between where
you are and where you want to be, this
assessment is for you.



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Small business leaders often find themselves stuck between where they are in the daily grind and where they want to be, saying "someday we'll work on strategy," "someday we'll fix our systems," "someday we'll get organized for real growth." That's exactly where my strategic growth coaching transforms businesses.

This assessment is designed to turn your someday into today and tomorrow. Through nearly two decades of helping businesses navigate growth challenges, from the high-stakes creativity of toy and game innovation to strategic transformations across manufacturing, I've discovered that breakthrough success comes from three critical elements: (1) scheduling dedicated time for strategic thinking, (2) identifying your highest-impact opportunities, and (3) creating clear roadmaps for sustainable growth.

This comprehensive evaluation addresses the complete business ecosystem: leadership development, marketing and sales alignment, product strategy, operations excellence, and cash flow management. This isn't about finding what's wrong with your business. It's about identifying where you are in your growth journey and building the strategic framework that moves you from reactive daily management to proactive business leadership.

What You'll Discover:

- Your current strategic position across all critical business areas
- Specific growth opportunities uniquely positioned for your business stage
- Clear action steps that create momentum rather than overwhelm
- The strategic framework that transforms good businesses into industry leaders

This assessment takes 8-10 minutes to complete thoughtfully. Your responses will help me provide you with customized strategic insights that address your specific growth stage and business challenges.

Section 1: Business Foundations

1. What industry are you in?
2. How long have you been in business?
3. How many employees do you have?
4. What is your annual revenue?
☐ Under \$1M
☐ \$2-5M
☐ \$6-10M
☐ Above \$10M

Section 2: Leadership Development

1. Do you have a leadership team?
☐ Yes
☐ No

2. If yes, evaluate your leadership team structure:
Do you meet regularly?
Rate your consistency (1 = Rarely/No Structure, 5 = Weekly with Clear Purpose)
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Do you have set agendas for leadership meetings?
Rate your meeting effectiveness (1 = No Agenda/Unstructured, 5 = Strategic Agendas with Clear Outcomes)
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Do you have an internal mission statement that your entire team understands and can articulate?
Rate your mission clarity (1 = No Clear Mission, 5 = Everyone Lives and Breathes It)
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. Does your company have a clear growth strategy for this year and 3 years out?
Rate your strategic planning (1 = No Written Strategy, 5 = Detailed Plans with Clear Milestones)
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Section 3: Marketing & Sales Strategy

Marketing Focus

1. Do you have clear messaging for your brand that differentiates you from competitors?

Rate your brand messaging clarity (1 = Generic/Unclear, 5 = Crystal Clear and Distinctive)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Do you have clear messaging for each of your products/services that addresses specific customer needs?

Rate your product/service messaging (1 = Generic Descriptions, 5 = Problem-Solution Focused)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Does your marketing messaging primarily focus on the problems you solve for customers or on your company's features and credentials?

☐ Customer Problems and Solutions (Customer-Focused)

☐ Company Features and Credentials (Company-Focused)

☐ Mixed/Unclear Focus

Sales Focus

4. What is your sales team structure?

☐ Inside sales team

☐ Outside sales team

☐ Combination of both

☐ Owner handles all sales

☐ No dedicated sales structure

5. How many dedicated sales people do you have? Include if they perform other client-facing responsibilities.

6. Are your sales team and marketing teams in alignment?

Rate your sales-marketing integration (1 = Completely Disconnected, 5 = Fully Integrated Strategy)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Section 4: Products & Revenue Strategy

1. Do you have a clear picture of what each of your products/services adds to your revenue and what the gross margin is for each?

Rate your revenue clarity (1 = No Financial Clarity, 5 = Detailed Profitability Analysis)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Do you have clear quarterly and yearly sales numbers for each product/service?

Rate your sales tracking (1 = No Product-Level Tracking, 5 = Detailed Performance Metrics)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Do you have a clear picture of the customer profile for each product/service?

Rate your customer understanding (1 = Generic Customer View, 5 = Detailed Customer Profiles by Product)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. When developing new products/services, do you have a well-defined process to analyze whether this offering is a good fit for your line?

Rate your development process (1 = No Systematic Process, 5 = Rigorous Strategic Analysis)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Section 5: Operations & Cash Flow Management

Operations Excellence

1. Do you have regular departmental meetings?

Rate your departmental communication (1 = No Regular Meetings, 5 = Consistent Strategic Meetings)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. Do you have company-wide meetings where everyone understands priorities and progress?

Rate your company-wide communication (1 = No All-Hands Meetings, 5 = Regular Strategic Updates)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. Do managers have regular one-on-one meetings with each employee in their department?

Rate your employee development (1 = No One-on-Ones, 5 = Consistent Individual Development)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

4. Does every employee understand your company's economic mission and how their daily work contributes to company success?

Rate employee mission connection (1 = No Understanding, 5 = Everyone Knows Their Impact)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

5. Do you feel everyone in your company is "rowing together" toward your vision?

Rate team alignment (1 = Disconnected Efforts, 5 = Unified Team Purpose)

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Section 5: Operations & Cash Flow Management

Cash Flow Management

6. How many months of cash reserves does your company have if revenue stopped today? Consider payroll, rent, and essential operating expenses

- ☐ Less than 1 month
- ☐ 1-2 months
- ☐ 3-5 months
- ☐ 6-11 months
- ☐ 12+ months

7. Do you always have the cash available to pay your quarterly and yearly tax obligations?

- ☐ Yes, always prepared
- ☐ Usually, with some planning
- ☐ Sometimes, requires scrambling
- ☐ Often challenging to manage
- ☐ Consistently problematic

8. Does the owner receive regular, consistent payments from the business?

- ☐ Yes, consistent scheduled payments
- ☐ Mostly, with occasional delays
- ☐ Irregular, depends on cash flow
- ☐ Rarely, reinvest everything
- ☐ No, living off personal savings

Section 6: Strategic Priorities

1. Which area feels most challenging for your business right now?

- ☐ Leadership Development and Team Alignment
- ☐ Marketing & Sales Strategy and Customer Acquisition
- ☐ Product Strategy and Revenue Optimization
- ☐ Operations and Internal Systems
- ☐ Cash Flow and Financial Management
- ☐ All areas feel equally challenging

2. What's your biggest business goal for the next 12 months?

3. What's currently your biggest obstacle to achieving that goal?

4. If you could solve one strategic challenge that would unlock significant growth, what would it be?

Next Steps: Strategic Growth Analysis

To receive your comprehensive Strategic Growth Analysis:

Email your completed assessment to: assessments@tamicstrategies.com
Subject Line: "Strategic Assessment - [Your Company Name]"

Within 3-5 business days, you'll receive a detailed analysis that includes:

- Your Strategic Growth Profile across all business areas
- Specific priority recommendations tailored to your business stage and challenges
- Clear 90-day action roadmap for your highest-impact opportunities
- Strategic insights drawn from successful companies in your growth stage

This isn't generic business advice—it's strategic guidance specifically designed for where your business stands today and where you're determined to go tomorrow.

Your assessment responses provide the foundation for understanding your unique strategic position, growth stage, and the specific opportunities that will transform your someday aspirations into systematic business advancement.

The businesses that achieve breakthrough results don't just work harder—they work with strategic clarity, focused implementation, and clear roadmaps that turn vision into sustainable competitive advantage.

Questions about this assessment or ready to discuss your growth challenges? Email me directly at tami@tamicstrategies.com. After nearly two decades of helping businesses unlock their strategic potential across diverse industries, I'm passionate about guiding companies from where they are to where they're determined to be.

Ready to turn someday into today and tomorrow?