

Entrepreneurial Self-Assessment

Operations

1. Menu of services clearly defined
2. Full payment system
3. Delivery and follow up
4. Sales and inventory reporting system
5. Customer relationship system - CRM
6. Record keeping and filing
7. Time management system
8. Sales support system
9. Strategic plan for the next 2-3 years
10. Written operations manual

Team

1. Describe your team
2. Who helps you – mentors, coaches, friends
3. Training and education plan
4. Core vision and mission
5. Skills required to grow
6. Team building philosophy
7. Hiring philosophy and plans
8. Firing philosophy
9. Job descriptions and org chart
10. What keeps everyone motivated

Sales

1. Branding and image
2. Networking
3. Sales presentation
4. Selling skills one on one
5. Customer service & people skills
6. Reputation, testimonials & referrals
7. Describe your products & services
8. Confident pricing & good margins
9. Social media & internet marketing
10. Marketing plan

You the Entrepreneur

1. Stress management
2. Industry – who to watch
3. Why are you doing this
4. Health and stamina
5. Passion and inspiration
6. Mental clarity and focus
7. Emotional intelligence
8. Philosophy of success
9. Fear
10. Self-motivation

Finances

1. Profit margins by division
2. Financial statements & bookkeeping
3. Professionals – accountant, bookkeeper, lawyer, banker
4. How much does the business pay you
5. Your philosophy of money and wealth
6. Can you afford to hire
7. What is your breakeven
8. Sales and net profit goals for this year, next year, and 5 years
9. Business model percentages
10. How much do you need to retire



Score for each aspect:

0 If you have no idea

1 If you have begun to think this through

2 If you have thought this through and have a strategy to deal with it.

Total Score: out of 100 _____