

Business Performance Indicator



Name: _____ **Title:** _____ **No of employees:** _____
Company: _____ **Address:** _____ **Turnover last year** _____
Tel No: _____ **Fax No:** _____ **email:** _____

The following questions are designed to help us to review the performance of your business and identify specific areas of weakness and/or opportunity. Please answer each question and by circling from 1 through 5 in the scoring column based on your own view of where the business is right now, ensuring that ALL questions are completed. Email your completed form to markchatterton@mbc-bis.com so that we can graph your results and discuss with you in more detail.

<- Disagree Completely Agree -> completely

VISION, DIRECTION AND LEADERSHIP

The business owner(s) possess a clear, written vision for the Company.	1	2	3	4	5
The Company has a clearly defined mission statement.	1	2	3	4	5
The Company has a clearly defined culture statement.	1	2	3	4	5
We have a staff contingency plan in place to ensure continuity in all areas.	1	2	3	4	5
The Company encourages and promotes social activities for all team members.	1	2	3	4	5
Employees are encouraged to set personally motivating career goals.	1	2	3	4	5
We encourage decision making from the shop floor upwards.	1	2	3	4	5
Employees see their roles as careers and not as temporary financial solutions.	1	2	3	4	5
We regularly utilise ideas from our team to improve our business performance.	1	2	3	4	5
We constantly praise our team for their achievements.	1	2	3	4	5

STRATEGIC PLANNING

The Company has a strategic business plan.	1	2	3	4	5
The Company measures progress against its strategic plan on a quarterly basis.	1	2	3	4	5
The Company is aware of all current market trends.	1	2	3	4	5
The Company regularly conducts planning sessions with all key team members.	1	2	3	4	5
The Company's cash flow is sufficient to achieve all its strategic objectives.	1	2	3	4	5
The Company has a clear direction aligned to that of the business owner(s).	1	2	3	4	5
The Company is not reliant upon any one single supplier.	1	2	3	4	5
The Company has excellent knowledge of its competitors activities.	1	2	3	4	5
The Company is generally moving in the direction determined by the owner(s).	1	2	3	4	5
The Company engages adequate professional services, (eg Banks, Accountant, Business Advisor).	1	2	3	4	5

WORK/LIFE BALANCE

I have sufficient time to ensure that things get done.	1	2	3	4	5
On average I work less than 37.5 hours per week.	1	2	3	4	5
I spend quality time with the people I care about and take regular exercise.	1	2	3	4	5
My assistant handles less important tasks allowing me to focus on more important issues.	1	2	3	4	5
I use a minimum of 10 well-being habits on a daily basis.	1	2	3	4	5
I regularly put aside funds to allow my financial independence.	1	2	3	4	5
I plan my days well in advance and never spend time fire fighting.	1	2	3	4	5
I am proud of my achievements both as a human being and a business owner.	1	2	3	4	5
I am content with my earnings from the business.	1	2	3	4	5
I do not allow things to get bottled up and cause me stress.	1	2	3	4	5

w: www.mbc-bis.com **t:** 07854 189782 **e:** markchatterton@mbc-bis.com

Business Performance Indicator



<- Disagree Completely Agree -> completely

CUSTOMER SERVICE

We regularly survey our clients to ascertain how we can serve them better.	1	2	3	4	5
We ensure customer satisfaction by systematically measuring what we do.	1	2	3	4	5
We aim for excellence in all that we provide to our customers.	1	2	3	4	5
We record and review our mistakes and use the results to improve our service.	1	2	3	4	5
We select clients who compliment our own unique way of doing business.	1	2	3	4	5
We believe that outstanding customer service is paramount, even more so than closing the sale.	1	2	3	4	5
We are able to change our direction instantly, if necessary, to match the needs of our clients.	1	2	3	4	5
We understand our clients needs and ensure our company meets them.	1	2	3	4	5
We constantly strive to under promise and over deliver on customer service.	1	2	3	4	5
We would happily forego a sale rather than compromise our customer service.	1	2	3	4	5

SALES

Our sales team receive regular sales and product training to ensure optimum performance.	1	2	3	4	5
Our sales process is systemised and performance is reviewed weekly to ensure targets are met.	1	2	3	4	5
Our sales team has quality point of sale materials and new techniques are constantly being developed.	1	2	3	4	5
Our sales force do not operate as individuals but jointly as a team.	1	2	3	4	5
Our production unit supports our sales team and do all they can to ensure the sale.	1	2	3	4	5
Our sales team are incentivised to encourage results.	1	2	3	4	5
We seldom have any friction or animosity between sales and other departments.	1	2	3	4	5
Our sales volumes and revenues are increasing continuously.	1	2	3	4	5
We are happy with our share of the market place.	1	2	3	4	5
Our sales team are responsible for projecting sales and are held accountable.	1	2	3	4	5

MARKETING

We are fully aware of our clients lifetime value which is continuously increasing.	1	2	3	4	5
We do not compete on price as we have found a niche for our products and services.	1	2	3	4	5
We never advertise randomly, and only do so when we can accurately test and measure the results.	1	2	3	4	5
We continuously monitor all leads, number of transactions and conversion rates	1	2	3	4	5
We have a unique selling proposition which is clearly understood by all team members.	1	2	3	4	5
We always teach our clients the benefits of our products and services.	1	2	3	4	5
We outsource our advertising and creative design whilst retaining ownership.	1	2	3	4	5
Each and every team member acts as an advertisement for our Company.	1	2	3	4	5
We establish why people do not buy from us in order to improve our servicability and product.	1	2	3	4	5
We market on the value of our products and services and not on price.	1	2	3	4	5

FINANCES, CASH FLOW AND BUDGETING

There is a clearly documented annual budget.	1	2	3	4	5
We adhere to our clearly defined budgeting processes.	1	2	3	4	5
We have a properly staffed and efficient accounts department.	1	2	3	4	5
The business produces accurate monthly financial reports.	1	2	3	4	5
Debtors pay their invoices on time.	1	2	3	4	5
Any current loans are being paid on time as per written agreements.	1	2	3	4	5
We negotiate supplier terms which include provision for early settlement discounts.	1	2	3	4	5
We regularly monitor our stock turn in order to maximise our cash flow.	1	2	3	4	5
Our budgets are sufficiently accurate so as to negate the need to redo.	1	2	3	4	5
We set optimistic rather than easy budgets.	1	2	3	4	5

Business Performance Indicator



<- Disagree Completely Agree -> completely

EFFICIENCY AND PRODUCTIVITY

We have designated people responsible for the day to day management of the business.	1	2	3	4	5
Operations, wherever possible are fully computerised.	1	2	3	4	5
We have excellent communication to ensure that duplication of work never happens.	1	2	3	4	5
All work is done to the correct standard and there is no rework.	1	2	3	4	5
All meetings are objective with a specific outcome and action plan.	1	2	3	4	5
We are driven by quality and profit and regularly measure and report on both areas.	1	2	3	4	5
Meetings are diarised and scheduled in advance to avoid "crisis" meetings.	1	2	3	4	5
All tasks are ranked in order of importance and urgency.	1	2	3	4	5
Our team has adequate resources to allow them to dramatically increase their productivity.	1	2	3	4	5
We actively encourage our team to communicate non-compliances in the workplace.	1	2	3	4	5

PROFITABILITY

Our profits will increase by 10% as a minimum this year.	1	2	3	4	5
Profit margins have increased, year on year, for the past 3 years as a minimum.	1	2	3	4	5
The total debt to equity ratio is decreasing year on year.	1	2	3	4	5
The percentage debt repayments versus gross profit is decreasing year on year.	1	2	3	4	5
All team members have clearly defined financial targets.	1	2	3	4	5
We have a relatively low break even point.	1	2	3	4	5
Our pricing is not influenced by the market leaders.	1	2	3	4	5
We are one of the market leaders.	1	2	3	4	5
We operate above the average level of profitability for our industry.	1	2	3	4	5
We operate at a minimum level of 80% utilisation.	1	2	3	4	5

TEAM, EMPLOYEES AND SUB-CONTRACTORS

We have an ongoing investment in team training.	1	2	3	4	5
Team members operate at their maximum potential.	1	2	3	4	5
We listen to our team members and encourage them to make recommendations.	1	2	3	4	5
Team members work together in synergy.	1	2	3	4	5
Team members are ready for challenges and embrace change positively.	1	2	3	4	5
Team members do not tolerate negativity and always promote positivity.	1	2	3	4	5
Team members adhere to the reporting systems that are in place.	1	2	3	4	5
Team members do not make excuses for performance and are held accountable.	1	2	3	4	5
Team members are happy and enjoy their work.	1	2	3	4	5
Team members take deadlines seriously and are well managed by their team leaders.	1	2	3	4	5

**Thank you for your time, to get the results of how your business rates,
please email this form to markchatterton@mbc-bis.com**

w: www.mbc-bis.com

t: 07854 189782

e: markchatterton@mbc-bis.com