FREE DIAGNOSTIC TOOLKIT FOR IDENTIFICATION OF STRENGTHS AND WEAKNESSES

Use this template to assess the current health of your business.

We ask that you objectively assess your business in these key areas using the score point 1-3 with three being strong.

1 = None 2 = Satisfactory 3 = Strong

	1	2	3
• ***Overall "vision" – goals***			
- Are there clear goals for the next 12 months	☐	☐	☐
- Is there a "vision" for the next 3 years	☐	☐	☐
• ***Financial Data*** – Do you have an awareness of;	**1**	**2**	**3**
- Annual returns	☐	☐	☐
- Cash-flow	☐	☐	☐
- Reliable profit	☐	☐	☐
- Funding available	☐	☐	☐
- Trends	☐	☐	☐
• ***Sales & Marketing;- Do you have***	**1**	**2**	**3**
- Written plan	☐	☐	☐
- Client info Management	☐	☐	☐
- Awareness of profit generators	☐	☐	☐
- Focused geographic coverage – Export?	☐	☐	☐
- Communication plan	☐	☐	☐
- Active marketing – including web use	☐	☐	☐
- Lead generation & follow up	☐	☐	☐
• ***HR Do you have***	**1**	**2**	**3**
- Up to date contracts	☐	☐	☐
- Regular appraisals/discussions	☐	☐	☐
- Staff Motivation initiatives	☐	☐	☐
- Clear management structure/expectations/goals	☐	☐	☐
- Training	☐	☐	☐
- Management skill sets available	☐	☐	☐
- Requirements & prepared for recruitment	☐	☐	☐
• ***Business Systems/Operations Do you***	**1**	**2**	**3**
- Have Business planning – risk assessment	☐	☐	☐
- Have Management Information Systems	☐	☐	☐
- Utilise Physical Assets Effecttively	☐	☐	☐
- Use IT Effectively	☐	☐	☐
- Assess Your Supply Chain for effectiveness	☐	☐	☐
- Sound Internal communications	☐	☐	☐
- Awareness of H&S legislation	☐	☐	☐

Please total the points you scored based on your self assessment. Scores below 42 shows a serious weakness in your business model. Scores between 42-62 shows an average performance and above 62 shows strengths in the way you currently run your business. This is just an initial diagnostic toolkit, obviously more work is needed in areas where you scored 1 or 2 and of course evidence of effectiveness in how you run your business in all these different areas need to be assessed as part two of the diagnostic review.

If you believe that your score gives you a cause for concern, please contact BSS Management Consultancy for further assistance.