## **Roth Gateway Action Plan**

Overview

**Assessment - Gateway Questionnaire** 

**Results Map** 

9 Ways Summary - From 9 Ways Alignment Consultation Questionnaire

**Detailed GOAL Development** 

**Strategy Selector** 

90 Day Plan

T & M

**Open Issues** 

**Closed Issues** 

5 Ways

**Performance Review** 

# Roth Planning Tool Assessment Questionnaire

The following questionnaire is organized around the 6 steps, and acts as a gateway to the 374 strategies in our 9 ways. Each of the statements/questions below will be mapped to one or more of our 374 strategies.

		Yes = 1 NO = 0	Danasatanas
	MASTERY - Chaos to Control	NO = 0	Percentages 0%
	TIME - Self Control		0%
1	I delegate or outsource most/all of the Admin and Low Value/Low Enjoyment work		
2	I regularly delegate routine activities		
3	I have a Default Calendar that delivers maximum productivity		
4	I work ON my business for at least 4 hours each week		
5	I write a "To Achieve" list each evening for the next day		
6	I do not operate in crisis mode and have good balance in my work		
7	I prioritize well and understand Urgency & Importance with all my decisions		
8	I have good self discipline and manage myself well		
	Total		
	TEAM		0%
1	Our employees work well together with little friction and morale is good		
2	We have the right staffing for our workload and rarely work overtime		
3	We have a company organization chart and all employees have a copy		
4	Individual responsibilities are clearly defined.		
5	We conduct regular Team meetings		
6	I possess a vision of where the company is going which I share with the TEAM		
	Total		
	MONEY		0%
1	Break Even		0%
2	I know how to calculate Break Even and know where my business stands in this regard		
3	I know my daily/weekly/monthly overhead costs		
4	I know on average, how much I MAKE on each sale		
5	I know how many sales, customers, or dollars I need to make per day/week/month to Break Even		
6	I regularly measure my sales, customers, and dollars statistics		
7	I have a Cash flow budget for the business		

I have a Break Even forecast for the business	
The company has an annual budget and reviews performance against it monthly.	
I understand and have calculated the true cost of each of our products or services	
I know my monthly cash flow requirements	
I monitor and track my receivables and payables on a regular basis	
Loans and bills are paid on time and according to supplier terms	
I regularly review key trends (GP%, G&A %, Key costs, Rev Growth, Employee Productivity)	
	Total
I have more than 5 strategies in place to increase my Margins	
	Total
I use these reports so I can make decisions for the future	
DIRECTION Goals	Total
I have a documented Vision for the business	
I have a documented Mission statement	
	I have a Break Even forecast for the business The company has an annual budget and reviews performance against it monthly.  I understand and have calculated the true cost of each of our products or services I know my monthly cash flow requirements I have appropriate internal financial controls for my business I monitor and track my receivables and payables on a regular basis Loans and bills are paid on time and according to supplier terms I regularly review key trends (GP%, G&A %, Key costs, Rev Growth, Employee Productivity)  Profit Margin  We never discount prices I regularly review my expenses and attempt to contain or drive down these costs I have a Profit and Loss budget for the business I plan for Profit and set daily/weekly/monthly Profit Goals I know how to increase my Gross Profit I have more than 5 strategies in place to increase my Gross Profit I know what Mark Up is and target levels I know what Margin is and have set Minimum Margin Goals I ensure that all products/services I sell make a Profit I know how to increase my Margins I have more than 5 strategies in place to increase my Margins I have more than 5 strategies in place to increase my Margins I have more than 5 strategies in place to increase my Margins I have more than 5 strategies in place to increase my Margins I know my Average SS sale I regularly review these figuresdaily/weekly/monthly I know my Average SS sale I regularly review my Cash flow positionmonthly I can predict my future cash flows I regularly review my Profit & Loss positionmonthly I can predict my future profits I use these reports so I can make decisions for the future  DIRECTION - Goals We have goals which are reviewed at regular intervals I have aliving business plan that I refer regularly refer to

0%

		Total
	DELIVERY - Service	
1	Customers generally have positive experiences in dealing with us	
2	Our products or services are almost always delivered on schedule or as promised	
2 3 4 5 6	We track customer feedback	
4	Consistency is our primary customer focus	
5	We deliver what our customers want	
	We deliver what our customers need	
7	I have defined our customer service standards	
8 9	We consistently deliver in a way that exceeds our customer's expectations	
9	We regularly survey our customers to determine how we can better serve them	
10	We analyze our mistakes and take active steps to remedy them	
11	I have a standard for dress code including the use of name tags	
12	We have a script/process in place for greeting customers	
13	We have a script in place for answering the phone	
14	We have documented flow charts/procedures to ensure every customer experience is the same	
		Total
	SYSTEMS	
1	We keep an accurate database of our customers and prospects	
2	We track our leads, our client conversion rate and the number of transactions per client, ongoing.	
3	I use a financial software package and create and use financial statements monthly	
4 5 6	I have determined and monitor important KPI's(key performance indicator's) for my business	
5	I understand my chart of accounts and have set it up to reflect management info needed	
	Our Sales Process is documented	
7	Our Sales Process is followed	
	NIOUE LIOD and One of Oak Floor	Total
	NICHE - USP and Great Cash Flow	
4	5 WAYS - The Business Chassis	
1	I know and understand the 5 Ways business chassis	
2	I know my numbers in each area	
3	I have a growth target in each area	Total
	USP & GUARANTEE - Point of Difference	IUlai
1	I have completed a USP & Guarantee assessment	
2	I have defined what my business Uniqueness is and it is truly unique	
3	I have produced a Guarantee that is meaningful	
4	My team knows what our point of difference and Guarantee is	
5	The company has a very good knowledge of it's competition and their practices.	
6	Our team has a very good understanding of our customer's needs and requirements	
7	The company has found a niche for it's product and no longer competes on price.	
<u> </u>	The company has round a mone for its product and no longer competes on price.	

0%

0%

8	We always educate clients on value and never market on price.	
	•	Total
	MARKETING RULES	
1	I believe that Marketing is an investment when I Test & Measure	
2	I spend more time generating income than reducing costs	
	I put 50% of my time, effort and investment into delivery of my products/services and the other 50% on	
3	Sales & Marketing	
	I Test & Measure everything	
5	I know my Acquisition Cost and understand that buying customers is an investment	
	I have a long term view of the value of our customers and know their Lifetime Value	
	I always aim to reduce my Acquisition Cost and increase my Lifetime Value	
8	We have a marketing/sales plan with identified target accounts based on our ideal customer	
9	We only advertise when we can test and measure the results. We do not advertise randomly.	
10	The sales force is equipped with quality marketing materials	
11	Our sales volumes are continuously increasing.	
12	The sales team is responsible for regular sales projections and held accountable.	
		Total
	MARGINS	
1	We promote our high margin goods or services	
2	We rank our customers and focus on eliminating D customers	
	I regularly review key industry trends (GP%, G&A %, Key costs, Rev Growth, Employee Productivity)	
4	I have identified 5-10 Margin strategies that I will use in my business	<b>T</b> ( )
	AVERAGE \$\$\$ SALE - More Money Per Purchase	Total
1	I have an Average \$\$\$ Sale target, and review progress towards it regularly	
	I have scripts in place and have trained my team in up selling and down selling	
	I have scripts in place and have trained my team in cross selling	
	I have identified 5-10 Average \$\$\$ Sale strategies I choose to use in my business	
5	I have a plan for implementing & reviewing these strategies	
6	We calculate our average dollar sale	
O	we calculate our average donar sale	Total
	CONVERSION RATE - Getting Better Sales Performance	10101
1	I have a Conversion Rate target, and review progress towards it regularly	
	My team use sale scripts	
3	We have a sales process which is documented	
4	We have a benefits and features list for our products/services	
2 3 4 5 6	Our sales team does regular training on products/services	
6	Our sales team does regular sales skills training	
	My sales team is responsible for regular sales projections and is held accountable	
8		

0%

9	I have a plan for implementing & reviewing these strategies	
10	We know our conversion rates from lead to customer	
11	We survey potential customers who do not buy our products to improve our product or service.	
		Total
	NUMBER OF TRANSACTION - Investing in existing customers	
1	I have a computerized customer database	
2	I have identified the key information I need about each client	
3	I have Graded all of my customers and know who are my A,B,C & D clients	
4	I have strategies in place to move my customers up the ladder of loyalty	
5	I have active strategies to encourage my existing customers to purchase again (and again)	
6	I make regular offers to my existing clients	
7	I contact my entire customer database at least every 90 days	
8	I have a system in place for innovating and adding value for my customers	
9	I have identified 5-10 No. of Transactions strategies I choose to use in my business	
10	I have a plan for implementing & reviewing these strategies	
11	We know our average number of transactions per customer	
12	The entire team is aware of the lifetime value of our customers	
13	Every member of our team is a walking, talking advertisement for the company.	
	LEAD OF MEDITION. Fire live was a great of	Total
1	LEAD GENERATION - Finding more prospects  I have identified my target market	
2	I have a list of non-competing businesses that target the same market as I do	
3	I have several strategic alliances in place	
4	I have a systemized referral strategy in place	
5	I know what publications my target market read and what organizations they belong to	
6	I only advertise after I have done a complete marketing strategy analysis and Break Even calculation	
7	I have a folder of my previous marketing campaigns	
8	I have a folder of other peoples marketing pieces	
9	I have a list of Headlines for my marketing pieces	
10	I have an annual marketing plan that is budget driven	
11	I have a marketing 10x10	
		Total
	LEVERAGE - Investing in Systems for improved productivity	
	SYSTEMS - I have documented my systems so the business works without me	
1	I have documented all sales and marketing systems	
2	I have documented and charted all information and work flow processes	
3	I have all key tasks and routines documented in a policies and procedures manual	
4	I have a process to track and control all updates to documentation	
5	I have a systems training & an orientation program	

0%

	I have identified up to 5 System strategies that I choose to use in my business, and have a plan for	
6	implementing / reviewing these strategies	
7	We have reviewed our basic systems to determine which require upgrading	
8	We have conducted a "Life of an Order" process study of our business	
9	We schedule & complete regular maintenance on all equipment	
10	We have automated all important systems	
11	We have documented all important systems  We have documented all important systems	
12	We run a regularly scheduled computer back up system	
	We use rosters and schedules for repetitive tasks	
13	·	
14	We have security systems	
15	Terms are negotiated with all suppliers including early payment discounts.	
16	We go through and regularly update QC and QA procedures	
17	We have comprehensive policy and procedure manuals that are updated regularly	
	TECHNOLOGY, Lundamatand that quaterns should must the husiness	Total
1	TECHNOLOGY - I understand that systems should run the business  I schedule & complete regular maintenance on all key items of equipment	
2	I run computerized systems for stock control, invoicing & credit monitoring	
3	I run a purpose designed computer database program to track customer details for sales and marketing	
4	I use up to date computer software and hardware	
5	I re-system as the business grows  I have regular off site computer (minimum weekly) back ups and regularly test these off site	
_		
6	(minimum quarterly)  I have identified up to 5 Technology strategies that I choose to use in my business, and have a plan for	
7	implementing	
8	We document information flow processes using a computer database program	
9	We upgrade office equipment regularly	
	KNOWLEDGE - I have read/watch/listen & made notes	Total
1	I read at least 2 books a month	
2	I've read Instant Systems by Brad Sugars	
3	I listen to tapes, CD's, etc on how to improve my business	
4	I watch DVD's, videos, etc on how to improve my business	
5	I go to seminars, conferences etc, to network with others in my field	
	I take courses or study aspects of my business	
6	1 take courses of study aspects of my business	Total
	PEOPLE	Total
1	We manage our business so our people and our processes can change to meet our customers needs.	
2	We have a complete systems training and induction program	
	1	Total
	TEAM - Investing in People for Improved Productivity	

0%

0%

	SIX KEYS TO A WINNING TEAM	
1	There are/is a strong leader(s) other than myself in the business	
2	We have identified what kind of leadership qualities are needed in my business	
3	Our culture and values statement has been established, written down and is available	
4	The team promotes and maintains the culture of the business	
5	There is a clear common goal that my team are aiming for	
6	I have positional descriptions and up to date contracts for every member of my team	
7	The company and each team member has a 90 day SMART goal plan	
8	I have developed and implemented my company's 'Rules of the Game'.	
9	I have implemented a strategy that lays down how results are to be achieved and measured (KPIS)	
10	My team have understand clearly what their roles and limitations are.	
11	Each role has been systemized and documented	
12	My whole team are involved and included	
13	Our Team is aligned with our Vision, Mission, Values, & Culture	
14	Every team member believes that creating "raving fans" is their single most important responsibility	
15	We conduct regular performance evaluations that focus on goal achievement & career planning	
16	We have a comprehensive contingency staffing system in place.	
17	The sales and production and/or service staffs operates as a team versus a group of individuals.	
		Total
	LEADERSHIP	
1	I regularly review the individual and joint performance of my team with them	
2	I have a strong clear vision that my team understand	
3	I consistently maintain the company vision	
4	I am able to trust my team and allow them responsibility to make decisions fix any upsets (support risk taking)	
5	My team works to their strengths	
6	We regularly schedule team recreational activities outside of the work environment	
		Total
	COMMUNICATION	
1	I hold regular team meetings	
2	The team meetings have measurable outcomes	
3	My team plays above the line	
4	I have a system for encouraging open communication amongst team members (WIFLE and others)	
5	Staff communication is good and duplication of work rarely occurs	
6	We regularly survey our employees	
7	We have a conflict resolution and mediation system in place	
		Total
	RECRUITMENT	
1	I have implemented and customized the action recruitment system to work in my business	
2	I employ people to "run the systems" in my business	
3	I hire on Attitude	
4	I have a consistent recruitment system	
	·	

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5	I have a system for ensuring people continuity and succession	
6	Our recruitment and hiring process is systematized	
		Total
	TRAINING	
1	I have 5-10 KPI's for each position in my business	
2 3 4 5	I have a program in place for ongoing training and team building	
3	I use behavioral style assessments for each team member	
4	Professional Development and Team Training is regularly scheduled and monitored	
5	We have up to date "how to" and "positional" manuals to facilitate job/duties training	
6	We have an employee orientation welcome system in place	
7	I have a systemized training program for skills	
		Total
4	RETAINING	
1	I have an up to date organizational chart	
2	I have an organizational chart for when the business is finished	
3	The company has a system for rewarding longevity and performance	
4	We are recognized by our employees as a great place to work	
5	We have a recognition system and incentive programs in place that honors our employee's achievements	
	KNOWLEDGE - I have read and made notes	Total
1	One Minute Manager	
2	Instant Team Building	
2	Fish	
3 4 5	Whale Done	
-		
5	Leadership - By Rudy G.  I have identified the "Team" strategies I choose to use in my business, and have a plan for	
6	implementing / reviewing these strategies	Total
	CVNEDCY Teem Punning Systems to Maximize Detential	TOtal
	SYNERGY Team Running Systems to Maximize Potential  SYNERGY - Where if I add one and one I get three or more	
1	I have an enrolling and inspiring company vision and mission	
2	My team knows about the vision, mission and rules of the game	
3		
	I have a system for career planning within the company	
4	I have an ongoing training system for staff including time management training, sales training and team skills	
4 5 6	My staff all have job descriptions and I have a redundancy system that I have shared with staff	
6	My business has contingency staffing plans in the case of any absence and staff are cross-trained so as to	
	I have identified, appointed and groomed a general manager so I can walk away from the business and still get	
7	massive results	
8	I don't have to show up at work every day	
9	I enjoy and am motivated by my work	

0%

10	My business fulfils my life goals	
11	The company has a formal written business plan focused on growth strategies	
12	Regular planning session are conducted with our team to assure input from all parts of the company	
13	Our customers are raving fans and regularly refer other customers to us	
14	Our team engages in open communication and positive interactions at all levels	
15	Our team produces top quality products and services the first time	
16	Team synergy is so advanced at all levels of the business that they function with minimal supervision	
17	Our product and service delivery is consistently very high	
18	The business plan is a living document regularly referred to, tested and measured and updated quarterly	
19	The company culture is defined, cooperative and forward thinking.	
20	No one area of the company is dependant on a single supplier.	
21	Every member of the team is contributing at their full potential.	
22	Every K P I in the business is improving and above industry norms	
23	Team and facilities are being utilized to at least 80% of their potential.	
		Total
	KNOWLEDGE - I have read and made notes	
1	Billionaire in Training by Brad Sugars	
2	Our Team is highly engaged in advancing their personal and professional development	
		Total
	RESULTS	
	PERSONAL	
1	I have financial and personal independence	
2	I am investing and growing assets outside my business	
3	I am giving back to charity	
4	I am mentoring others	
	I have surrounded myself with a dream team (outside your business) – Ideas person, prioritizing and planning	
5		
	person, detail person, linancial person etc.	
	person, detail person, financial person etc.  I have written a book, booklet or developed a business game. I own intellectual property that is earning me an	
6	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an	
	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.	
7	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.  I am actively putting on an exit strategy in place	
7 8	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.  I am actively putting on an exit strategy in place  I regularly spend quality time with the people who are important in my life	
7 8	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.  I am actively putting on an exit strategy in place  I regularly spend quality time with the people who are important in my life  I live a healthy balanced lifestyle, communicate and express my feelings openly in a stress free environment	
7 8 9	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.  I am actively putting on an exit strategy in place I regularly spend quality time with the people who are important in my life I live a healthy balanced lifestyle, communicate and express my feelings openly in a stress free environment I work less than 50 hours per week.	
7 8 9 10	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.  I am actively putting on an exit strategy in place I regularly spend quality time with the people who are important in my life I live a healthy balanced lifestyle, communicate and express my feelings openly in a stress free environment I work less than 50 hours per week. I am engage in financial planning geared to financial independence	
7 8 9 10 11	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.  I am actively putting on an exit strategy in place I regularly spend quality time with the people who are important in my life I live a healthy balanced lifestyle, communicate and express my feelings openly in a stress free environment I work less than 50 hours per week. I am engage in financial planning geared to financial independence I am proud of my team, business, contributions to community and personal and professional achievements.	
7 8 9 10 11	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.  I am actively putting on an exit strategy in place I regularly spend quality time with the people who are important in my life I live a healthy balanced lifestyle, communicate and express my feelings openly in a stress free environment I work less than 50 hours per week. I am engage in financial planning geared to financial independence	Total
8 9 10 11	I have written a book, booklet or developed a business game. I own intellectual property that is earning me an income.  I am actively putting on an exit strategy in place I regularly spend quality time with the people who are important in my life I live a healthy balanced lifestyle, communicate and express my feelings openly in a stress free environment I work less than 50 hours per week. I am engage in financial planning geared to financial independence I am proud of my team, business, contributions to community and personal and professional achievements.	Total

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2 ]	I have groomed a general manager who runs the business for me		
3 (	Our business is achieving all revenue and profit goals		
4	I manage my time effectively and efficiently with more time to focus "working on my business"		
5	I am happy with the financial returns my business is awarding myself, my team and our families		
	Total		

Mastery	Niche	Leverage	Team	Synergy	Results	Total	Average
0%	0%	0%	0%	0%	0%	0%	0%
Time	5 Ways	Systems	6 Keys to a Win	Synergy	Personal		
0%	0%	0%	0%	0%	0%		
Team	USP & Gurantee	Technology	Leadership	Knowledge	Business		
0%	0%	0%	0%	0%	0%		
Money	Marketing Rules	Knowledge	Communication				
0%	0%	0%	0%				
Break Even	Margins	People	Recruitment				
0%	0%	0%	0%				
Profit Margin	Ave \$\$ Sale		Training				
0%	0%		0%				
Reporting	Convers. Rate		Retaining				
0%	0%		0%				
Direction	# of Transactions		Knowledge				
0%	0%		0%				
Delivery	Lead Generation		•	-			
0%	0%						
Systems							
0%							

9 W		Client Responses
	YOUR PERSONAL GOALS	
1	Leisure Time	
2	Top 5 words that describe you	
3	Personal Role model and why	
4	Business Role Model and why	
5	Personal Goals	
6	Partner's goals	
7	Means of achieving these goals	
8	Your Dream	
9	Passive income from your business?	
10	Why not	
	YOUR BUSINESS GOALS	
1	In business because	
2	Initial goals and ambitions	
3	Realized goals	
4	Goals now and how they changed	
5	Hours per week working	
6	Happy?	
7	Happy with money?	
8	Desire to make \$	
9	What do you want from the mentor program	
YOU		
1	Feel you are good at	
2	Feel you need to improve	
3	Current systems or team challenges	
4	New systems and team challenges if you expand	
5	Frustrations in industry	
6	Frustrations in your business	
7	Team members understanding of your goals	
8	Rate communication	
YOU		
1	Different Target Markets	
2	Description of each	
3	Important factors	
4	Papers/Magazines	
5	Potential Alliances	
6	Other targets	
LEA		
1	Test and measure leads ☐ Yes How many	
2	□ No How many potential	
3	Current advertising or marketing	
4	Current number going now	
5	Done in the past didn't work	
6	Why didn't work	
7	Competitors doing well	
8	What competitors do that affect you  2 things compute mind Clients	
9	3 things come to mindClients	
10	What limits advertising and marketing	
11	List of un-converted prospects □ No □ Yes  Details do you keep	
12 CON	Details do you keep	
CON	TeM Commission and for summer advantage D.V. V.	
1	T&M Conversion rates for current advertising ☐ Yes It is	
2	□ No What it could be	
3	More than one type of conversion rate ☐ No ☐ Yes	
4	They are	
5	People tend to □ Walk in □ Phone In  They sek	
6	They ask	I

7	Basic prospect contact process is
8	# of Strategies to increase conversion rate
9	Sales scripts □ No □ Yes
10	They are
11	Formal sales training for team \( \square\) No \( \square\) Yes
12	Type of training
13	3 things come to mind when I say "Salesperson"
14	Things that stop people from buying
15	Meaning in \$\$ of increasing conversion rate by 10%
NUM	
1	Test and measure your number of transactions □ Yes
2	# of people who come back?
3	□ No Estimate Frequency you think your customers come back
4	% that never come back?
5 6	Database of past customers □ No □ Yes Information kept in your database
7	
	Frequency of contact your past customers
8	Method employed Those that work are
9	
10	Those that have not worked are Why they didn't work
11 12	Why they didn't work  Benefit of regular contact Yes □ No
13	Reason why not
AVE	
1	Test and measure average dollar sale □ Yes It is
2	□ No You Think it is
3	Current strategies to improve it □ No □ Yes
4	They are
5	Offer package deals  No  Yes They are
6	Accept credit cards/Debit Cards □ No □ Yes
7	Because
8	Current cross-selling or on-selling
9	Currently stock or offer clients aren't buying
PRO	
1	Know your true margins □ No □ Yes
2	They are calculate by
3	Include freight ☐ Yes ☐ No
4	Date prices increased
5	Increase by
6	Costs that should be reduced □ No □ Yes
7	They are
RETA	
1	Buying in bulk □ No □ Yes
1	Buying in bulk □ No □ Yes Bulk items are
2	Buying in bulk    No   Yes Bulk items are Slow moving items   No  Yes They are
1 2 3 4	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is
1 2 3 4 5	Buying in bulk  \( \text{No} \) Yes  Bulk items are  Slow moving items  \( \text{No} \) No  \( \text{Yes} \) Yes They are  Know Stock turns over  \( \text{No} \) No  \( \text{Yes} \) Yes It is  Tried negotiate a better deals  \( \text{No} \) No  \( \text{Yes} \) Yes Able to negotiate
1 2 3 4 5	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is  Tried negotiate a better deals    No    Yes    Able to negotiate  3 things come to mind when I say "Money"
1 2 3 4 5 6	Buying in bulk  \Bo \Bo Yes  Bulk items are  Slow moving items  \Bo \Bo Yes They are  Know Stock turns over  \Bo \Bo Yes It is  Tried negotiate a better deals  \Bo \Bo Yes Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy  \Bo \Bo Yes Able to get a subsidy of
1 2 3 4 5 6 7	Buying in bulk  \Bo \Bo Yes  Bulk items are  Slow moving items  \Bo \Bo Yes They are  Know Stock turns over  \Bo \Bo Yes It is  Tried negotiate a better deals  \Bo \Bo Yes Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy  \Bo \Bo Yes Able to get a subsidy of
1 2 3 4 5 6 7 SYS	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is  Tried negotiate a better deals    No    Yes    Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy    No    Yes    Able to get a subsidy of
1 2 3 4 5 6 7 SYS	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is  Tried negotiate a better deals    No    Yes    Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy    No    Yes    Able to get a subsidy of
1 2 3 4 5 6 7 Peop	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is  Tried negotiate a better deals    No    Yes    Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy    No    Yes    Able to get a subsidy of  Areas your staff performs better  Key skills & knowledge that is lacking
1 2 3 4 5 6 7 SYS Peop 1 2 3	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is  Tried negotiate a better deals    No    Yes    Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy    No    Yes    Able to get a subsidy of  Areas your staff performs better  Key skills & knowledge that is lacking  Staff training & development initiatives are
1 2 3 4 5 6 7 SYS Peop 1 2 3 4	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is  Tried negotiate a better deals    No    Yes    Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy    No    Yes    Able to get a subsidy of  Areas your staff performs better  Key skills & knowledge that is lacking  Staff training & development initiatives are  Work/responsibilities not currently delegated
1 2 3 4 5 6 7 SYS Peop 1 2 3 4 5 5	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is  Tried negotiate a better deals    No    Yes    Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy    No    Yes    Able to get a subsidy of  Areas your staff performs better  Key skills & knowledge that is lacking  Staff training & development initiatives are  Work/responsibilities not currently delegated  Skills your team needs so you would delegate
1 2 3 4 5 6 7 SYS Peop 1 2 3 4	Buying in bulk    No    Yes  Bulk items are  Slow moving items    No    Yes    They are  Know Stock turns over    No    Yes    It is  Tried negotiate a better deals    No    Yes    Able to negotiate  3 things come to mind when I say "Money"  Asked for supplier subsidy    No    Yes    Able to get a subsidy of  Areas your staff performs better  Key skills & knowledge that is lacking  Staff training & development initiatives are  Work/responsibilities not currently delegated

8	Regular schedule of meetings are
9	They cover
3	Operational Performance
	Strategy
	Personnel Planning/evaluation
	Finance
	Improvement Initiative/programs
10	Functional barriers are
11	Meeting discipline is like
12	Ground rules for meetings are
13	Our Mission/Vision and Culture statements are
14	We live by them?
15	HR systems e.g. recruitment system is
16	Job descriptions and KPI's are in line with company strategy?
17	Targets are updated every
Deliv	ingo ao apato oroi j
1	Most inefficiencies are in
2	Process improvement initiatives are
3	Not implementing
	Service is systematic, high quality and consistent?
5	It is measured/recorded/by/every/ and is reported every
6	Actions are taken from these every
7	Formal feedback from customers is done by
8	Improvements in efficiency are you looking for are
9	Most useful productivity information
10	Information would be used for
Testi	
1	The numbers/KPI's that I need to know are
2	Information can be accessed now?
3	It takes this much time to access it
4	The person responsible for getting that information together is
5	The financial information I need is
6	I need this information every
7	The financial systems I think would save me time, money and cost are
8	Other useful measurements are
Syst	
1	
2	The person responsible for updating and modifying systems is  Changes are logged?
3	Procedures that are regular and repetitive are
4	Procedures that are regular and repetitive are  Procedures are supported by a paper or technological system?
5	Procedures are supported by a paper or technological system?  We use IT systems for
6	Our IT processes support/replace
	Con 11 processes supportreprace
FINA	
1	The one thing I can do for you right now is

## **Detailed GOAL Development**

1 Year GOALS	3 Year GOALS	5 Year GOALS	Why is it meaningful?
·	·	·	·

#### i ne '90 Day Fian' SIMAKT Goals as stated on 10/18/12

Goal No. 1:	
Goal Start Date:	January 31, 2012
Strategy	
Actions	
Due Date	
Success Markers	
Doculto	
Results	
Goal No. 2:	
Goal Start Date:	January 31, 2012
St. 1	
Strategy Actions	
Actions	
D D (	. 122 222
Due Date Success Markers	April 30, 2012
Success Markers	
Results	
Goal No. 3:	
Goal Start Date:	January 31, 2012
Strategy Actions	
Actions	
Due Date	April 30, 2012

Success Markers	
Results	

### **Weekly Coaching Focus Sheet**

Sections marked \* to be completed right after the coaching call and emailed to coach. Remaining sections to be filled in and emailed the day before the next coaching session.

Name: Coach	ing day and time:			Date			
* The ✓	Number 1 Thing Learn	ned From T	oday's Call				
* Goa	ıls/Objectives/Promise	s set for ne	ext week	G	oal Achieved?	Comments	
Goal	✓				Yes Comments No	s:	
Goal 2	✓				Yes Comment No	s:	
Goal 3	✓				Yes Comment No	s:	
Goal 4	✓				Yes Comments No	3:	
BE: DO:				HESE GOALS I			
		End last quarter	Today	Goal this quarter	Goal this month	Gap in month +	Gap in quarte
	New Contact Meetings Conversions Attendance Income						
	My brightest achievem  My main challenge this  Something that I learn  I am most grateful for  At the moment, my greach  As my coach you can	s past weel ed through eatest focu	k was reading, lis	stening to a N king <u>on</u> my o	rganization is		g life

#### **SELF-ASSESSMENT**

# of hours spent in Outreach and Evangelism	#
Motivation/Attitude	%
I am	

I feel		