

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	Percentages
MASTERY - Chaos to Control			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		

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 <input type="checkbox"/> Yes How many	
2	<input type="checkbox"/> 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	
9	3 things come to mind.....Clients	
10	What limits advertising and marketing	
11	List of un-converted prospects <input type="checkbox"/> No <input type="checkbox"/> Yes	
12	Details do you keep	
CON		
1	T&M Conversion rates for current advertising <input type="checkbox"/> Yes It is	
2	<input type="checkbox"/> No What it could be	
3	More than one type of conversion rate <input type="checkbox"/> No <input type="checkbox"/> Yes	
4	They are	
5	People tend to <input type="checkbox"/> Walk in <input type="checkbox"/> Phone In	
6	They ask	

7	Basic prospect contact process is
8	# of Strategies to increase conversion rate
9	Sales scripts <input type="checkbox"/> No <input type="checkbox"/> Yes
10	They are
11	Formal sales training for team <input type="checkbox"/> No <input type="checkbox"/> 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 <input type="checkbox"/> Yes
2	# of people who come back?
3	<input type="checkbox"/> No Estimate Frequency you think your customers come back
4	% that never come back?
5	Database of past customers <input type="checkbox"/> No <input type="checkbox"/> Yes
6	Information kept in your database
7	Frequency of contact your past customers
8	Method employed
9	Those that work are
10	Those that have not worked are
11	Why they didn't work
12	Benefit of regular contact Yes <input type="checkbox"/> No
13	Reason why not
AVE	
1	Test and measure average dollar sale <input type="checkbox"/> Yes It is
2	<input type="checkbox"/> No You Think it is
3	Current strategies to improve it <input type="checkbox"/> No <input type="checkbox"/> Yes
4	They are
5	Offer package deals <input type="checkbox"/> No <input type="checkbox"/> Yes They are
6	Accept credit cards/Debit Cards <input type="checkbox"/> No <input type="checkbox"/> 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 <input type="checkbox"/> No <input type="checkbox"/> Yes
2	They are calculate by
3	Include freight <input type="checkbox"/> Yes <input type="checkbox"/> No
4	Date prices increased
5	Increase by
6	Costs that should be reduced <input type="checkbox"/> No <input type="checkbox"/> Yes
7	They are
RETA	
1	Buying in bulk <input type="checkbox"/> No <input type="checkbox"/> Yes
2	Bulk items are
3	Slow moving items <input type="checkbox"/> No <input type="checkbox"/> Yes They are
4	Know Stock turns over <input type="checkbox"/> No <input type="checkbox"/> Yes It is
5	Tried negotiate a better deals <input type="checkbox"/> No <input type="checkbox"/> Yes Able to negotiate
6	3 things come to mind when I say "Money"
7	Asked for supplier subsidy <input type="checkbox"/> No <input type="checkbox"/> Yes Able to get a subsidy of
SYS	
Peop	
1	Areas your staff performs better
2	Key skills & knowledge that is lacking
3	Staff training & development initiatives are
4	Work/responsibilities not currently delegated
5	Skills your team needs so you would delegate
6	Clear organizational chart with roles, responsibilities and areas for growth?
7	Succession plans and how they are regularly updated

8	Regular schedule of meetings are
9	They cover
	• 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	
1	Most inefficiencies are in
2	Process improvement initiatives are
3	Not implementing
4	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	The person responsible for updating and modifying systems is
2	Changes are logged?
3	Procedures that are regular and repetitive are
4	Procedures are supported by a paper or technological system?
5	We use IT systems for
6	Our IT processes support/replace
FINA	
1	The one thing I can do for you right now is

**The 90 Day Plan SMART Goals
as stated on 10/18/12**

#####

Goal No. 1: _____

Goal Start Date: January 31, 2012 _____

Strategy	
Actions	
Due Date	
Success Markers	
Results	

Goal No. 2: _____

Goal Start Date: January 31, 2012 _____

Strategy	
Actions	
Due Date	<u>April 30, 2012</u>
Success Markers	
Results	

Goal No. 3: _____

Goal Start Date: January 31, 2012 _____

Strategy	
Actions	
Due Date	<u>April 30, 2012</u>

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:

Coaching day and time:

Date:

*** The Number 1 Thing Learned From Today's Call**



*** Goals/Objectives/Promises set for next week...**

Goal Achieved? Comments...

Goal ✓

Yes Comments:
 No

Goal ✓
2

Yes Comments:
 No

Goal ✓
3

Yes Comments:
 No

Goal ✓
4

Yes Comments :
 No

*** TO ACCOMPLISH THESE GOALS I WILL**

BE:	
DO:	

LEADING BY NUMBERS SCOREBOARD

	End last quarter	Today	Goal this quarter	Goal this month	Gap in month + -	Gap in quarter + -
New Contact Meetings						
Conversions						
Attendance						
Income						

My brightest achievement this past week was ...



My main challenge this past week was ...



Something that I learned through reading, listening to a MP3, watching a DVD or living life ...



I am most grateful for ...



At the moment, my greatest focus when working on my organization is ...



As my coach you can help me out in this next session by ...



SELF-ASSESSMENT

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

I feel ...