



INITIAL EVALUATION

*Select the areas that need the most improvement in your organization.
Rank: 1 = Poor; 10 = Excellent*

SALES & MARKETING

- ___ Product Depth.....
- ___ Product Profitability
- ___ Product Positioning
- ___ Competitive Analysis
- ___ Customer Analysis.....
- ___ Sales Analysis.....
- ___ Pricing
- ___ Advertising/Promotion.....
- ___ Distribution Methods
- ___ Sales Organization
- ___ Sales Training.....
- ___ Sales Force Controls.....
- ___ Sales Incentive Plan.....
- ___ New Business Generation.....
- ___ Product Life Cycle.....
- ___ Marketing Plan
- ___ Feasibility Studies.....
 - New Products/Services.....

ORGANIZATION

- ___ Organizational Analysis/Structure - SWOT
- ___ Management Meetings.....
- ___ Management Reporting
- ___ Management Training.....
- ___ Authority Delegation.....
- ___ Project Implementation.....
- ___ New Business Development
- ___ Order Anticipation.....
- ___ Materials Planning.....
- ___ Purchasing Controls
- ___ Receiving Controls.....
- ___ Inventory Mgmt/Controls
- ___ Scrap/Rework.....
- ___ Capacity Utilization.....
- ___ Budgetary Targets.....
- ___ Production Scheduling.....
- ___ Shipping Procedures.....
- ___ Quality Controls
- ___ Office Efficiency.....
- ___ Production Efficiency
- ___ Paperwork Flow
- ___ Information Systems.....
- ___ Strategic Planning - Organizational Goals.....
- ___ Strategic Planning - Ownership Goals
- ___ Strategic Planning - Departmental Goals.....
- ___ Executive Retreats
- ___ Succession Plans
- ___ Estate Planning
- ___ M&A Prospect Qualification.....
- ___ Business Valuation.....
- ___ Venture Capital Acquisition.....
- ___ Financing
- ___ Line of Credit
- ___ Due Diligence.....

FINANCIAL

- ___ Monthly Profit & Loss
- ___ Monthly Budget/Forecasting
- ___ Profit Center Accounting.....
- ___ Departmental P&L's.....
- ___ Financial Interpretation/Benchmarking.....
- ___ Estimating/Pricing
- ___ Job Costing
- ___ Management Flash Reports.....
- ___ Cash Controls.....
- ___ A/R Aging.....
- ___ A/P Aging.....
- ___ Credit Policy.....
- ___ Cash Flow Planning.....
- ___ Operating Reports.....
- ___ Ratio Analysis
- ___ Breakeven Analysis.....
- ___ ROI Analysis
- ___ Credit Line.....
- ___ Business Plan Development
- ___ Tax Planning
- ___ Return on Sales
- ___ Return on Equity
- ___ Return on Assets.....
- ___ Profit Level
- ___ Collection Procedures.....
- ___ Accounting System Dev/Implementation
- ___ Bank Relations

HUMAN RESOURCE MGMT

___ Training & Development Programs
___ Personality Styles
___ Employee Policies - PPH.....
___ Recruiting Policies.....
___ Procedures
___ Job Descriptions.....
___ Performance Objectives/Key Result Areas
___ Evaluation & Review System.....
___ Wage/Salary Levels.....
___ Management Incentives
___ Compensation/Incentive System.....
___ Benefit Package
___ Insurance Coverage
___ Morale and Motivation

SYSTEMS DEVELOPMENT

___ Cost/Benefit Analysis
___ Management Requirements
___ Accounting Requirements
___ Clerical Requirements
___ Data Handling Requirements
___ Strategic Needs
___ Financial Reporting.....
___ Report Generation.....
___ Equipment Analysis
___ Software Analysis.....