



Business Planning Guide

GOALS

What are the Top 3 specific, tangible results you want to have accomplished in the next 12 months?

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What do you think it will take to make it happen?

What, if you had to guess, could get in the way of that result from being accomplished?

CURRENT REALITY

What's working in your company right now? (please be specific)

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What's not working? (please be specific)

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If we were to pick the low hanging fruit, what are the areas we would tackle that could make an immediate difference in your performance, as a company or as a leader?

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DEFINE THE GAME

Are you working from a clear, written game plan for your business?

(do you have a business plan, strategic plan or written objectives)

Do you have specific targets for key metrics such as sales, gross profit, net profit, A/R turnover, employee turnover?

How clear do you think each member of your team is on the game, and their part in helping you win it?

Do you have any milestones or progress markers and how does progress get communicated back to your team about results v. intended results?

What happens in your company if you miss a target or a milestone?



SALES AND MARKETING

Who in your company is responsible for marketing and do they have performance targets?

Do you have a sales and marketing pipeline program in place to forecast volume?

Do you have a written sales process and is it followed by everyone who does sell?

Are estimators held to a performance standard in terms of sales and gross profit?

What's your sweet spot for type/size of work:

- Ideal type of job?
- Ideal size of job?
- Target margin?
- Jobs you like to do?
- Jobs you're good at doing?
- What type of jobs do you not like to do and why?



REPORTING STRUCTURES

ACCOUNTABILITY

Are there performance measurements in place for all staff, field and office?

How do people know they're producing the result?

What happens when people don't perform?

COMMUNICATION

How freely does information move in your company?

Do you have regular staff meetings? Who attends?

When you have meetings, how productive are they?



FINANCE

How often are your financials produced?

How often do you look at your P&L and Balance sheet, and what's your process for reviewing them and taking action from what you see?

Who else sees the Financials and how do you elicit their feedback?

How current are your receivables and is that in your target range?

How current are your payables and is that in your target range?

SYSTEMS

On a scale of 1-10, how well would you say your company executes, as a whole?

(1-poorly - 10-superbly)

If that number is less than an 8, what do you think are the underlying issues?

On a scale of 1-10, how well do you keep your promises:

- to your customers?
- to each other?
- to vendors/subs?

Do you have a set of written procedures and systems for key areas such as, marketing, sales, admin, production, HR, Finance?

In your opinion, do you have any systems or procedures that are cumbersome, irrelevant, redundant or inconsistent?

If we asked your average customer how easy you are to deal with as a company, what would they say?



TEAM

HIRING/TRAINING

Who is responsible for the hiring process and how does it get accomplished?

On a scale of 1-10, rate your current team, as a whole, as regards their ability to deliver on your mission?

Do you have written and clear job descriptions and accountabilities for every position, field and office?

Do you have any Bonus plans or incentives in place ... please describe?

What do you do in the way of staff development and ongoing training?

Do you do regular performance reviews, if so when, who participates in the reviews?



LEADERSHIP

How would you describe your leadership style?

What do you think are your top 3 leadership traits?

What did you learn from your parents about leadership?

What do you intuitively know you need to work on to become a more effective leader?

If we asked your staff, what would they say about you as a leader?

Who are your role models?

Who are the leaders in your company?

Who has the potential to be a leader?

What are you currently doing to develop yourself as a leader?



Support

Who supports you the most in your company?

Who supports you the least?

If you were to be supported in a way that allowed the company to soar, what would that look like?