

Personal Wheel: Assessment Sheet

Directions: On the following pages rate yourself from 1-10 in each category. Divide your total by 10 to reach your final number in each category. Using spokes of the wheel image below, plot your number in each category and connect the dots to see how smooth your ride is.

Physical

- ___ appearance
- ___ regular checkup
- ___ energy level
- ___ muscles toned
- ___ regular fitness program
- ___ weight control
- ___ diet & nutrition
- ___ stress control
- ___ endurance & strength
- ___ enough sleep
- ___ TOTAL ÷ 10 = _____

Spiritual

- ___ believe in God
- ___ inner peace
- ___ influence on others
- ___ spouse relationship
- ___ church involvement
- ___ sense of purpose
- ___ attitude for giving donations
- ___ prayer
- ___ Bible study
- ___ abundant gratitude
- ___ TOTAL ÷ 10 = _____

Mental

- ___ attitude
- ___ intelligence
- ___ formal education
- ___ continuing education & training
- ___ creative imagination
- ___ inspirational reading
- ___ inquisitive mind
- ___ self-image
- ___ enthusiasm
- ___ automobile university
- ___ TOTAL ÷ 10 = _____

Family

- ___ listening
- ___ good role model
- ___ principled but flexible
- ___ forgiving attitude
- ___ build self-esteem of others
- ___ express love and respect
- ___ meals together
- ___ family relationships
- ___ dealing with disagreements
- ___ time together
- ___ TOTAL ÷ 10 = _____

Financial

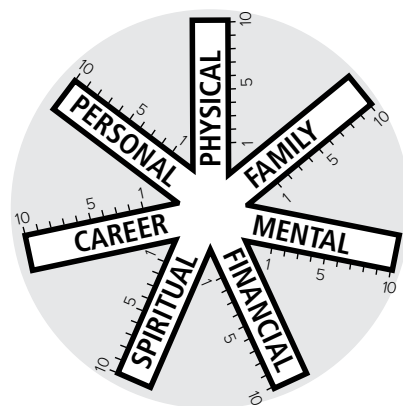
- ___ proper priority
- ___ personal budget
- ___ impulse purchases
- ___ earnings
- ___ living within income
- ___ money in savings
- ___ adequate insurance
- ___ investments
- ___ financial statement
- ___ debt free
- ___ TOTAL ÷ 10 = _____

Personal

- ___ recreation
- ___ exercise
- ___ friendships
- ___ community activities
- ___ service clubs
- ___ quiet time
- ___ growth time
- ___ consistent life
- ___ appropriate social media
- ___ time management
- ___ TOTAL ÷ 10 = _____

Career

- ___ love what I do
- ___ understand my job
- ___ co-worker relationships
- ___ productivity
- ___ understand company goals
- ___ understand my activity in relationship to my goals
- ___ appreciate company benefits
- ___ opportunity for advancement
- ___ well-trained for my job
- ___ own my business/have career path
- ___ TOTAL ÷ 10 = _____



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Business Wheel: Assessment Sheet

Marketing

- ___ Meeting or exceeding my sales goals through effective lead generation and promotion strategies
- ___ We have a clear position in the marketplace
- ___ We have clearly defined our prime target market
- ___ We have clear definitions of our products and/or services
- ___ We have a pricing strategy that is profitable
- ___ We are consistently marketing to our house list (client base)
- ___ We have an effective referral relationship program
- ___ We have an effective referral/affiliate reward system
- ___ We have a written, posted marketing calendar
- ___ We have an effective Internet marketing system that includes web-sites that clearly communicate what we do, and utilize SEO, and we are consistently capturing e-mail addresses and using them to communicate to our e-mail audience, and we have a strong presence on social media.
- ___ TOTAL ÷ 10 = _____

Sales

- ___ We answer the telephone live
- ___ We have an effective telephone answering/transferring system
- ___ We have an effective sales script that appeals to our target market and closes the maximum number of inquiries
- ___ We have an effective system for responding to Internet leads
- ___ We have an effective sales process for each of our profit centers
- ___ We have an effective up-sell and down-sell process
- ___ We have effective processes and scripts for overcoming objections
- ___ We have an effective process for identifying ongoing and changing customer needs
- ___ We have clearly defined account management policies and procedures
- ___ We have effective customer management software in place
- ___ TOTAL ÷ 10 = _____

Operations

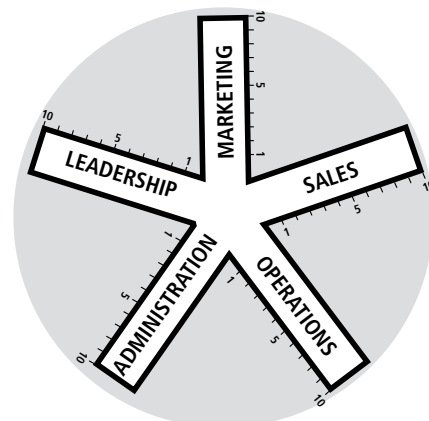
- ___ We have developed our unique service experience
- ___ We have clear-cut service systems in place that are exceeding our client expectations
- ___ We respond immediately to client concerns
- ___ We have clear-cut return policies
- ___ We get customer feedback on a regular basis to ensure we are exceeding expectations
- ___ We have regular production meetings to ensure on-time delivery
- ___ We have a key customer appreciation process
- ___ We have effective project management processes in place
- ___ We have inventory management and office supplies/equipment processes in place
- ___ We have the latest, most effective equipment to deliver our unique service experience
- ___ TOTAL ÷ 10 = _____

Administration

- ___ We track and report total sales daily
- ___ We track and report sales by profit center weekly, monthly and annually
- ___ We track and report sales by referral/affiliate/ad source weekly
- ___ We track and report sales closings daily (# of calls vs. # of sales)
- ___ We track and report number of returns or re-services as often as they occur
- ___ We track and report our profit and loss weekly
- ___ We track and report our balance sheet monthly
- ___ We have a cash flow management process in place
- ___ We plan our taxes annually before year end
- ___ We review our legal and insurance exposure annually (or as often as required)
- ___ TOTAL ÷ 10 = _____

Leadership

- ___ We have a one-sentence mission statement that everyone understands and follows
- ___ We have effective management systems in place that include recruiting, hiring, orientation, training, coaching, employee reviews and termination processes, and have ensured they are legal
- ___ We have an up-to-date employee handbook
- ___ We have a written business plan that includes our vision, goals, a marketing plan, sales plan, operating plan and administration plan that is reviewed and updated quarterly
- ___ We have a written and posted organizational chart
- ___ We have regular team meetings
- ___ We have written position descriptions for every position
- ___ We have a training system in place for every position
- ___ We have policies and procedures for all areas of our business
- ___ We have an effective compensation plan in place that includes attractive pay and benefits that create high employee morale and retention
- ___ TOTAL ÷ 10 = _____



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