ProjectedGrowth CONSULTING

Company Name:
Date:

Business Assessment Overview:

Company Goals:

Strengths

Weaknesses

Opportunities

Threats

Accounting/Financial	Concern	In Place
Bookkeeping System in Place		
Invoicing Current		
Payroll and taxes current		
A/R Current		
A/P Current		
Generated Reports monthly		
Monthly and Quarterly Utilization of reports		
Weekly Cash flow or Performance Reporting in place		

Marketing	Concern	In Place
Annual Marketing Plan and Budget		
Industry Research/Competitor Research		
Products, Service Mix, Retail, Equipment		
Demographic information		
What is your target market…do you know it?		
Do you have a unique market (marketing) position?		
Do you have a monthly action plan?		
Collateral Materials - status and types		
Current Advertising: mix, medias and budgets		
How is practice location, parking and signage?		
Retail merchandising, retail mix and retail sales?		
Do you have events, how many per year, results?		
Is your website performing and converting leads to sales?		

Sales & Profitability	Concern	In Place

Revenue for past three years			
Cost of Goods			
Labor Costs			
Profit Margins			
Fixed Expenses			
Debt Level			
Projected Revenue for the next month, quarter, year, ect.			
Owner's Draw/Profit Sharing			

Operations

	Concern	In Place
Organizational Charts		
Management Staff Level		
Current Staffing situation		
Position Descriptions		
Hiring/Recruiting Plan		
Turn over rate		
Facility and Flow		
Inventory Control: monthly counting, system for monitoring		
Sales Process: do you have a set process for new clients and consults?		
Scheduling		
Facility Management and Appearance		

Human Resources/Staffing

	Concern	In Place
Handbook, Orientation, Training Program		
Written Job Descriptions		
Evaluations regularly		
Pay Models for Each Employee		
Weekly and monthly staff meetings		
Company Bonus Program		
Progressive Discipline		
Termination Checklist		

Ideas or Action Plan in place:

Excellent

Excellent

Excellent

Excellent

Excellent