

Current Reality Assessment

Name _____ Company _____

Jim Collins (author of *Good to Great*) advises "**confront the brutal facts.**" If you start with an honest and diligent effort to determine the truth of your situation, **the right decisions** become self-evident. By completing our Current Reality Assessment, you can benchmark your company for growth.

Once complete, return to Scramjet Strategies by fax to 888-654-9546 so we can prepare for your consultation.

Answer each question and rate your business by assigning and circling a score based on the degree to which you agree with the statement:

1 = RARELY (or NO) 2 = SOMETIMES 3 = USUALLY (or YES)

PEOPLE

People decisions are about happiness. Hiring and retaining the right people makes the difference between ulcers and headaches or a company you look forward to leading.

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|----|------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|
| 1 | Are you <i>attracting and keeping</i> key people whose performance measures up to your needs, standards, and expectations? | 1 | 2 | 3 |
| 2 | Are you providing a working environment where people are <i>encouraged to grow and develop</i> on both professional and personal levels? | 1 | 2 | 3 |
| 3 | Are all of the key people who make up your company "Keepers" for the long term? | 1 | 2 | 3 |
| 4 | Are your key people an inseparable part of your future plans for your organization? | 1 | 2 | 3 |
| 5 | Do all of your organization's key people deliver on their commitments? | 1 | 2 | 3 |
| 6 | Do you formally assess the performance of your key people? | 1 | 2 | 3 |
| 7 | Do you provide your key people with open, honest, frank and direct feedback? | 1 | 2 | 3 |
| 8 | Do you review and share the feedback one-on-one? | 1 | 2 | 3 |
| 9 | Do you have a comprehensive Employee Policies & Procedures Manual? | 1 | 2 | 3 |
| 10 | Do you have a formal Management & Leadership Skills Development Process? | 1 | 2 | 3 |

TEAM

Please circle the numbers on the scales below that you believe accurately reflect the **performance** of the **Primary Team** with whom you work and interact in your organization. Be sure to evaluate the statements honestly and without over thinking your answers.

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| 1 | Team members are passionate and unguarded in their discussion of issues. | 1 | 2 | 3 |
| 2 | Team members call out one another's deficiencies or unproductive behavior. | 1 | 2 | 3 |
| 3 | Team members know what their peers are working on and how they contribute to the collective good of the team. | 1 | 2 | 3 |
| 4 | Team members quickly and genuinely apologize to one another when they say or do something inappropriate or possibly damaging to the team. | 1 | 2 | 3 |
| 5 | Team members willingly make sacrifices (such as budget, turf, head count) in their departments or areas of expertise for the good of the team. | 1 | 2 | 3 |
| 6 | Team members openly admit their weaknesses and mistakes. | 1 | 2 | 3 |

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| 7 | Team meetings are compelling and not boring. | 1 | 2 | 3 |
| 8 | Team members leave meetings confident that their peers are completely committed to the decisions that were agreed on, even if their was initial disagreement. | 1 | 2 | 3 |
| 9 | Morale is significantly affected by the failure to achieve team goals. | 1 | 2 | 3 |
| 10 | During team meetings, the most important (and difficult) issues are put on the table to be resolved. | 1 | 2 | 3 |
| 11 | Team members are deeply concerned about the prospect of letting down their peers. | 1 | 2 | 3 |
| 12 | Team members know about one another's personal lives and are comfortable discussing them. | 1 | 2 | 3 |
| 13 | Team members end discussions with clean and specific resolutions and calls to action. | 1 | 2 | 3 |
| 14 | Team members challenge one another about their plan and approaches. | 1 | 2 | 3 |
| 15 | Team members are slow to seek credit for their own contributions, but quick to point out those of others. | 1 | 2 | 3 |

LEADERSHIP AND DIRECTION

What is leadership? Remove for a moment the moral issues behind it, and there is only one definition: Leadership is the ability to obtain followers. *John C. Maxwell*

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| 1 | Is your company vision (BHAG) clearly defined, communicated and written out in detail? | 1 | 2 | 3 |
| 2 | Are your company culture and values well defined? | 1 | 2 | 3 |
| 3 | Does your company have a clear purpose (mission) statement? | 1 | 2 | 3 |
| 4 | Is your Leadership Team clearly defined so that the right people are in the right places, and your company is fully capitalizing on their respective strengths? | 1 | 2 | 3 |
| 5 | Do you have a clearly defined, understood, and respected Chain-of-Command? | 1 | 2 | 3 |
| 6 | Do your Leadership Team coaching and mentoring skills measure up to the needs of your key people? | 1 | 2 | 3 |

STRATEGIC PLANNING

Revenue and growth come from your strategy. If you can't state your strategy in a sentence, you don't have one. These are the decisions that make you real money and help you dominate your industry

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|----|-------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|
| 1 | Do you have a Long-Term Strategic Plan for your organization? | 1 | 2 | 3 |
| 2 | If so, is it communicated to and used by your company staff to drive decisions? | 1 | 2 | 3 |
| 3 | If so, is it delivering acceptable results? | 1 | 2 | 3 |
| 4 | Can you state your strategy in a sentence? | 1 | 2 | 3 |
| 5 | Do you have Regular planning sessions conducted with staff and management? | 1 | 2 | 3 |
| 6 | Does your planning reflect open rigorous discussion on the critical high leverage strategies and tactics that will drive business growth? | 1 | 2 | 3 |
| 7 | Can each member of your team easily articulate key elements of your strategic plan? | 1 | 2 | 3 |
| 8 | Is there tight linkage between your business plan and all your key operating systems to drive execution and accountability? | 1 | 2 | 3 |
| 9 | Do you have a Vision, Mission, and Values Statement? | 1 | 2 | 3 |
| 10 | Do you have a Succession and /or Business Transition Plan? | 1 | 2 | 3 |

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SALES

Sales force development and effectiveness drives revenue.

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|---|---------------------------------------------------------------------------------------------------------------|---|---|---|
| 1 | Do you have a formal Sales Management process with activity plans, tracking, forecasting, and accountability? | 1 | 2 | 3 |
| 2 | Does your sales force operate as a team versus a group of individuals? | 1 | 2 | 3 |
| 3 | Are you satisfied with your market share and revenue? | 1 | 2 | 3 |
| 4 | Do you have an ongoing Sales Training and Development Process? | 1 | 2 | 3 |
| 5 | If so, is it delivering acceptable results? | 1 | 2 | 3 |
| 6 | Is your sales team aligned with your sales strategies? | 1 | 2 | 3 |

MARKETING

The goal is to have a **PERSUASIVE STRATEGY** on-line and off-line that will convince your **CORE CUSTOMER** to buy your **UNCOMMON OFFERING** vs. all other offerings

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|---|-------------------------------------------------------------------------------|---|---|---|
| 1 | Do you have a comprehensive Marketing Plan? | 1 | 2 | 3 |
| 2 | If so, is it delivering acceptable results? | 1 | 2 | 3 |
| 3 | Does every member of your team know and understand who your core customer is? | 1 | 2 | 3 |
| 4 | Does every member of your team know and understand your brand promise?. | 1 | 2 | 3 |
| 5 | Do your key people implement Marketing in an effective manner? | 1 | 2 | 3 |
| 6 | Are metrics or Key Performance Indicators established and measured? | 1 | 2 | 3 |

CUSTOMER SATISFACTION

How will your clients answer the ultimate question: Will you refer us to your friends and colleagues?

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|---|-----------------------------------------------------------------------------|---|---|---|
| 1 | Do you have a Customer Service Improvement Program? | 1 | 2 | 3 |
| 2 | If so, is it delivering expected results? | 1 | 2 | 3 |
| 3 | Is Customer/Client Turnover within acceptable limits? | 1 | 2 | 3 |
| 4 | Does your company test and measure to ensure customer satisfaction? | 1 | 2 | 3 |
| 5 | Do you survey clients regularly to determine how you can better serve them? | 1 | 2 | 3 |
| 6 | Do you choose clients to fit your way of doing business? | 1 | 2 | 3 |

EXECUTION

Execution is about profit and saving time. The goal is to reduce the time it takes to manage your growing company, and to achieve alignment and results.

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| 1 | Are all of your organizational goals being met? | 1 | 2 | 3 |
| 2 | Are your most important organizational goals being met? | 1 | 2 | 3 |
| 3 | If you were asked to write down the three most important goals of your organization, then asked your key people to do the same, would the answers agree? | 1 | 2 | 3 |
| 4 | Do you hold regular Management Team meetings? | 1 | 2 | 3 |
| 5 | If so, are they effective in helping you achieve organizational goals? | 1 | 2 | 3 |
| 6 | Do the individuals on your Management Team set measurable business goals? | 1 | 2 | 3 |
| 7 | Do the individuals on your Management Team achieve their measurable business goals? | 1 | 2 | 3 |

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|----|-------------------------------------------------------------------------------------------------------------|---|---|---|
| 8 | Do you have a written Annual Operating Plan? | 1 | 2 | 3 |
| 9 | If so, is it delivering acceptable results? | 1 | 2 | 3 |
| 10 | Does every facet of your company have a person assigned with accountability for goal achievement? | 1 | 2 | 3 |
| 11 | Do you have a company dashboard of critical numbers consistently reviewed and used by your Leadership Team? | | | |
| 12 | Are your Core ideologies are "alive" in your organization? | 1 | 2 | 3 |
| 13 | Do you track and communicate Productivity performance? | 1 | 2 | 3 |
| 14 | Are current Productivity levels acceptable? | 1 | 2 | 3 |

BALANCE

If you allow yourself to get run down and reactive, you lose the perspective that allows you to see what you should and shouldn't be doing.

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|---|--------------------------------------------------------------------------|---|---|---|
| 1 | Do you have enough free time to pursue your outside personal interests? | 1 | 2 | 3 |
| 2 | Do you have a mentor, coach, or confidant in your professional life? | 1 | 2 | 3 |
| 3 | Do you take a Vacation every year? | 1 | 2 | 3 |
| 4 | Do you have daily well-being habits and do them consistently? | 1 | 2 | 3 |
| 5 | Are your days well planned with key priorities (your "rocks") scheduled? | 1 | 2 | 3 |
| 6 | Do you express feelings long before they cause undo stress? | 1 | 2 | 3 |

PROFIT

The universal measure of success.

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|---|----------------------------------------------------------------------------------------------------|---|---|---|
| 1 | Profit margins have increased over the last three years. | 1 | 2 | 3 |
| 2 | Profitability as a rule is higher than your industry average and is not an issue for your company. | 1 | 2 | 3 |
| 3 | Your Leadership Team is informed of and accountable for profit. | 1 | 2 | 3 |
| 4 | Your pricing policies are not tied to the market leaders. | 1 | 2 | 3 |
| 5 | Your staff and facilities are being utilized to at least 80% of their potential. | 1 | 2 | 3 |

CASH FLOW

Cash is the oxygen of your business. You can survive a long time without profit but you cannot survive a day without cash. It is the lifeblood of any firm.

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|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|
| 1 | Does your organization have adequate funding to meet it's needs? | 1 | 2 | 3 |
| 2 | Is your organization making as much money as you would like? | 1 | 2 | 3 |
| 3 | Are you <i>confident</i> that you or your people are NOT "Leaving Money On The Table" in current Sales, Operation, or Production activities, or through lost opportunities? | 1 | 2 | 3 |
| 4 | If you are "Leaving Money On The Table", it is NOT in significant amounts. | 1 | 2 | 3 |
| 5 | If all of your Business Creditors asked for their receivables from your organization today, in full, could you satisfy the demand without putting your business in jeopardy? | 1 | 2 | 3 |
| 6 | Does your company have an annual budget in written form to work from? | 1 | 2 | 3 |
| 7 | Are financial statements done monthly, at the very minimum? | 1 | 2 | 3 |
| 8 | Is your accounting department properly staffed and run to your satisfaction. | 1 | 2 | 3 |
| 9 | Are you tracking your Cash Conversion Cycle monthly? | 1 | 2 | 3 |
| 10 | Do you monitor your cash position daily? | 1 | 2 | 3 |

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URGENT CHALLENGES

List the five most urgent challenges and Key Performance Issues facing you or your company today.
Then, **prioritize them** in descending order.

Priority

YOUR MANAGEMENT & LEADERSHIP CHARACTERISTICS

Please circle the numbers on the scales below which you believe accurately **reflect your own performance** as a Leader and Manager in your present position within your organization.

1. ABILITY TO COMMUNICATE

1 2 3 4 5 6 7 8 9 10
UNCLEAR, CONFUSING VERY CLEAR

2. ORGANIZATION

1 2 3 4 5 6 7 8 9 10
POORLY ORGANIZED WELL ORGANIZED

3. RESULTS ORIENTATION

1 2 3 4 5 6 7 8 9 10
POOR RESULTS OUTSTANDING RESULTS

4. FOLLOW-THROUGH

1 2 3 4 5 6 7 8 9 10
POOR FOLLOW-THROUGH EXCEPTIONAL FOLLOW-THROUGH

5. DRIVE

1 2 3 4 5 6 7 8 9 10
LOW DRIVE, SLUGGISH HIGH DRIVE, ENERGY, AND OUTPUT

6. TOUGH-MINDEDNESS

1 2 3 4 5 6 7 8 9 10
TOO EASY-GOING FIRM AND ASSERTIVE

7. PRODUCTIVITY

1 2 3 4 5 6 7 8 9 10
LOW PRODUCTIVITY HIGH PRODUCTIVITY

8. SELF-CONFIDENCE

1 2 3 4 5 6 7 8 9 10
LOW SELF-CONFIDENCE HIGH SELF-CONFIDENCE

9. ABILITY TO MOTIVATE/COACH/MENTOR/DEVELOP PEOPLE

1 2 3 4 5 6 7 8 9 10
POOR VERY EFFECTIVE

10. LEADERSHIP

1 2 3 4 5 6 7 8 9 10
WEAK, INEFFECTIVE STRONG, EFFECTIVE

11. DECISIVENESS

1 2 3 4 5 6 7 8 9 10
INDECISIVE VERY DECISIVE

12. GOAL ORIENTATION

1 2 3 4 5 6 7 8 9 10
NO GOALS CLEAR GOALS