



WHAT IS YOUR COMPANY'S

CURRENT REALITY?

TO CHANGE, YOU MUST FIRST UNDERSTAND
WHERE YOU'RE **STARTING FROM.**

BECOMEABUSINESSCOACH.COM

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Since 1989 we have Pioneered the Professional Business Coaching Industry and have Certified Business Coaches in the US, Canada, Mexico, China, Japan, and 34 other countries with the BusinessCoach.com Methodology.



THE GOAL

The goal of this exercise is to provide you with powerful questions to give you a clear picture of your organization's current reality. Understanding where you are now will help propel you to where you want to be.

YOUR CURRENT REALITY

1. VISION

WHAT IS YOUR VISION FOR YOUR BUSINESS OR ORGANIZATION?

WHAT IS THE MISSION THAT YOU ARE ON?

WHAT ARE THE CORE VALUES OF THE ORGANIZATION?

WHAT IS IT THAT YOU WANT? WHAT DON'T YOU HAVE NOW?

WHAT ARE YOU COMMITTED TO (BIG PICTURE)?



WHAT ARE YOU TOLERATING RIGHT NOW, THAT IF IT WERE TO CHANGE YOU WOULD BE MORE EFFECTIVE AS A LEADER?

HOW UNREASONABLE ARE YOU WILLING TO BE WITH YOURSELF TO GET BACK TO WHO YOU WERE BEFORE YOU STARTED TOLERATING OTHERS' BEHAVIOR?

WHO'S HOLDING YOU ACCOUNTABLE ON A DAY-TO-DAY BASIS?

WHAT ACTIONS SHOULD YOU TAKE TO LET GO AND MOVE ON TO WHAT'S NEXT?

WHAT'S MISSING?

KEY LEADERSHIP TEAM MEMBERS: WHO ARE THEY AND HOW LONG HAVE THEY BEEN WITH YOU?



2. KEEPING SCORE

HOW CURRENT ARE YOUR:

(RATE AS CURRENT, NONCURRENT, OR NEEDS MINOR UPDATES)

- PROFIT AND LOSS STATEMENTS _____
- BALANCE SHEETS _____
- ACCOUNTS PAYABLES _____
- ACCOUNTS RECEIVABLES _____
- PAYROLL TAXES _____
- LOANS _____
- LINES OF CREDIT _____

DO YOU HAVE BUDGETS AND ARE YOU MEASURING MONTHLY?
(MAY WE HAVE COPIES?)

WHEN CAN WE GO OVER THE FINANCIALS WITH YOU?



3. TRACKING SYSTEMS

WHAT MEASUREMENT TOOLS DO YOU HAVE IN PLACE NOW?
(MAY WE HAVE A COPY?)

4. MARKETING & ADVERTISING

LET'S TALK ABOUT YOUR SALES MANAGEMENT AND YOUR SALES TEAM.
WHAT MEMBERSHIPS AND ASSOCIATIONS, NON-PROFIT ORGANIZATIONS,
NETWORKING GROUPS AND SERVICE ORGANIZATIONS ARE YOU PART OF?

ADVERTISING:

ARE YOU LISTED IN MOST DIRECTORIES? DO YOU ADVERTISE? IF SO, WHERE?
ARE YOU IN ANY MAGAZINES, NEWSPAPERS, OR TRADE JOURNALS?
DO YOU USE BROCHURES, WEBSITES, EVENTS, SOCIAL MEDIA, OR PUBLIC
RELATIONS TO PROMOTE YOUR ORGANIZATION?

WHAT PROFESSIONAL RELATIONSHIPS HAVE HELPED YOUR
ORGANIZATION GROW THE MOST?
(MAY WE GET COPIES OF WHAT YOU ARE CURRENTLY DOING?)



5. CUSTOMER RELATIONS

DO YOU MEASURE YOUR CUSTOMER RELATIONSHIPS?

HAVE YOU DONE A CUSTOMER SURVEY?
IF SO, WHEN WAS IT COMPLETED?
(MAY WE HAVE A COPY?)

6. STRATEGIC PLAN

WHAT DOES YOUR STRATEGIC PLAN LOOK LIKE?
DO YOU SHARE IT WITH YOUR EMPLOYEES REGULARLY?
(MAY WE HAVE A COPY?)

7. POLICY & PROCEDURES

DO YOU HAVE A POLICY & PROCEDURES MANUAL?
(MAY WE HAVE A COPY?)



8. HIRING & ONBOARDING

WHAT HIRING PROCESS IS IN PLACE CURRENTLY?

DO YOU HAVE A NEW EMPLOYEE INDOCTRINATION AND ONBOARDING PROGRAM IN PLACE?
(MAY WE HAVE A COPY?)

9. TRAINING

WHAT TRAINING PROGRAMS DO YOU HAVE IN PLACE CURRENTLY?
HOW OFTEN DO YOU TRAIN YOUR EMPLOYEES?

10. EVALUATION

DO YOU EVALUATE YOUR EMPLOYEES ON A QUARTERLY BASIS?



11. TEAM MEETINGS

DO YOU HOLD REGULAR TEAM MEETINGS?
HOW OFTEN?
IS ATTENDANCE REQUIRED FOR EVERYONE?

12. JOB DESCRIPTIONS

DO YOU HAVE JOB DESCRIPTIONS FOR EVERY EMPLOYEE?
(MAY WE GET A COPY?)
