

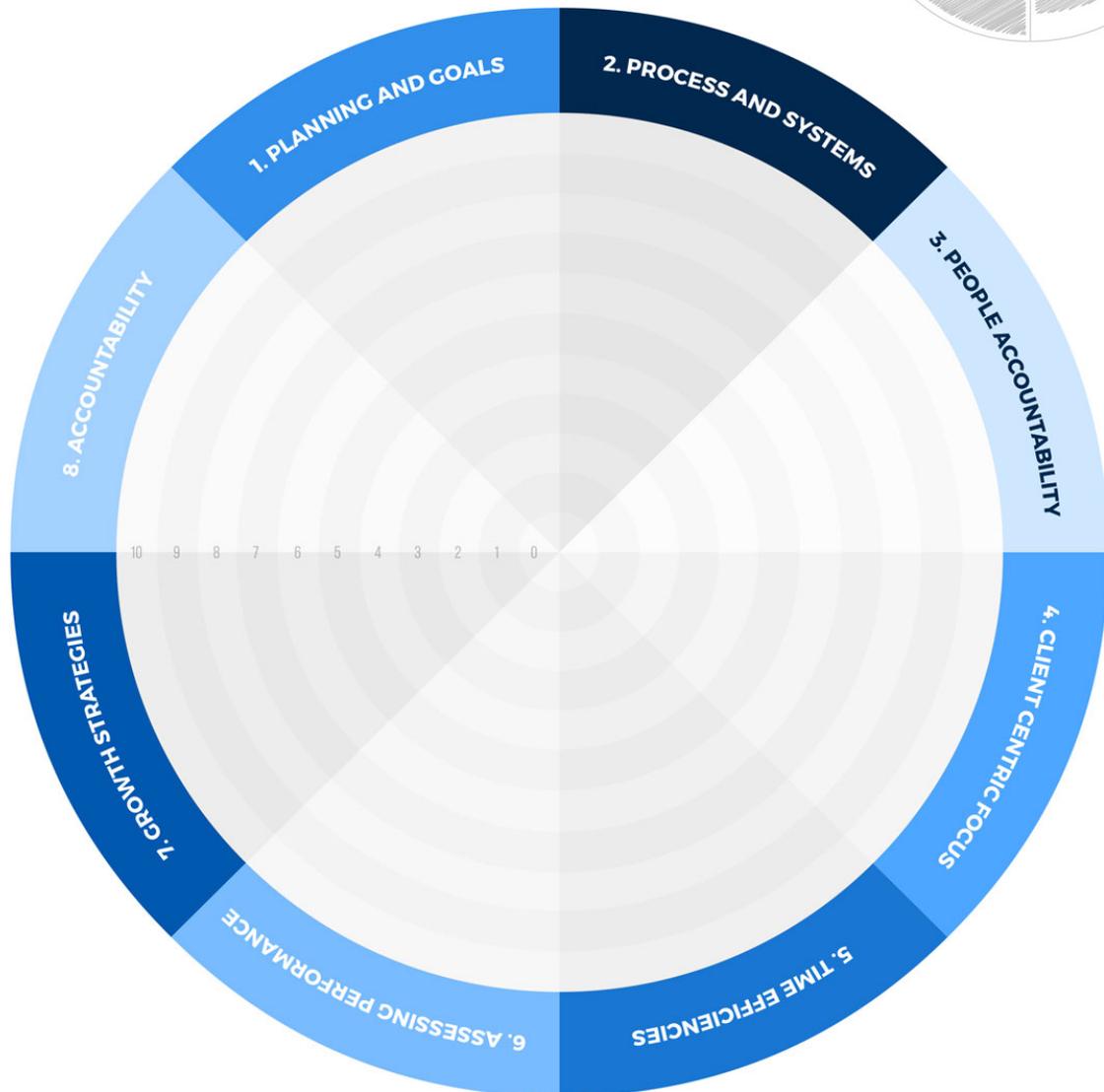
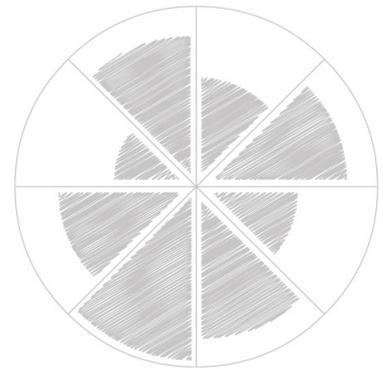
# Wheel of Business

Name: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Reflect and assess where you are in the eight key areas of your business on a scale of 1 -10.

There is no right or wrong answer it is purely an honest self-assessment of how your business is at this point in time in these areas.

As a guide, a score of 10 means you are operating at an optimum level and there is no room for improvement. A score of one (centre part of circle) means this area needs immediate attention and improvement.



## **1. Planning and Goals**

Your business has clearly documented and defined 3 year and 12-month goals with 90-day action steps. These are active documents in your business. You have clearly defined vision and mission statements. These are all reviewed and monitored regularly to ensure you are on track.

## **2. Processes and Systems**

You have documented and refined processes and systems in all key areas of your business. The business is operating at its most efficient and optimum and there are no areas for improvement. No enhancements are possible in what you do and how well you do it.

## **3. People Accountability**

All staff, including you, have job descriptions and clearly defined duties, expectations and KPIs. The right people are doing the right jobs. Staff have accountability and performance measures are in place; their KPIs are consistently met and appraisals are completed and up to date. Staff satisfaction is monitored, they are empowered and morale in the office is constantly high.

## **4. Client Centric Focus**

Everything you do is focused on your client's needs and achieving the outcomes you promise. You have high standards and procedures for dealing with clients at each engagement point in your process. You have a robust client compliant process and regularly seek client feedback.

## **5. Time Efficiencies**

You and your staff constantly work on the most appropriate tasks and use your time exceptionally well. You know what your time is worth, and you focus on the HPAs you need to do every day. Your strength is being able to prioritise and delegate, so you are working on your HPAs. You are never under time pressures.

## **6. Assessing Performance**

You have all the right measures in place. All key metrics and analytics are reviewed, refined and assessed regular. You make adjustments based on the results they reveal.

## **7. Growth Strategies**

Your marketing is functioning and operating at its optimum. You have sufficient new client's opportunities, a high retention rate of existing clients, and active profitable joint venture and referral partners. You network effectively and regularly. Your social media presence create a constant source of opportunity and you are regularly sharing valuable content.

## **8. Accountability**

You are fully accountable for what you do, when you do it and how you do. You operate responsibly and consistently get things done on time and at the standards you require. You are consistently holding yourself to higher standards and you are constantly challenging yourself and your results.