

# BUSINESS PERFORMANCE AUDIT

## INSTRUCTIONS:

- Place appropriate VALUE NUMBER in selected column box for each numbered question
- Sub-total each vertical column (add all the 1's, 2's, etc.)
- Total four columns
- Compare your total to the legend below

	VALUE 1 We have not considered it.	VALUE 2 We have considered it, but have not implemented.	VALUE 3 We do it, but inconsistently.	VALUE 4 We do it consistently and well.
1. We follow a formal business s planning process.				
2. We have clearly defined job roles for every employee.				
3. We support the improvement of both technical and people skills.				
4. Each employee has specific, tactical and clearly communicated goals that align with our company strategies.				
5. We conduct monthly reviews with each employee to discuss progress and refocus.				
6. We have a clearly defined process for procuring materials and services.				
7. We study our price, cost, and margin metrics monthly.				
8. We track our expense, sales and profitability performance versus plan.				
9. We complete a sales plan with specific goals & targets.				
10. We accurately project monthly sales and profitability.				
11. We maintain comprehensive customer records, profiles, sales call reports.				
12. We have account plans for our key customers.				
13. We track the progress of each sales opportunity.				
14. We prepare for sales calls by researching the customer, reviewing goals for the call, and preparing open-ended questions to understand customer needs.				
15. We have a methodology for advancing the sale in every sales call.				
16. We sell solutions, not just products/services.				
17. We capture our expertise and successes in testimonials, articles, and papers to reinforce our knowledge source position.				
18. Our employees can consistently articulate the value we bring to our customers.				
19. We deliver a consistent experience for each customer every time they deal with our company.				
20. We have a formal process for meeting with our customers to review performance and objectives.				
SUB-TOTAL				

### LEGEND:

- 68-78 Some opportunities for improvement
- 40-67 Many opportunities for improvement
- 20-39 Seek assistance today

TOTAL ALL COLUMNS \_\_\_\_\_