



**BUSINESS VALUE DRIVERS MISSION CRITICAL ACTIVITIES PERSONAL ASSESSMENT**

Your information			
First Name		Work Phone	( )
Last Name		State/Province (US/Canada)	
Company Name		Postal Code	
Email Address		Country	

Which range includes your age?		Yes	Is your business annual revenue more than \$1MM?
	No	No	
	18 - 24	Yes	Are you in (own and operate) business more than 5 years?
	25- -34	No	
	35 - 44	Yes	Is your business a woman owned (more than 51%)?
	45 - 54	No	
	55 - 64	Yes	Is your business a franchised?
	65 or older	No	
How many employees or contractors do you have in your business?		Yes	Did you start your business from scratch? (or did not buy a business to start)
	Less than 5	No	
	5 - 10	Yes	Do you own 100% of this business?
	10 - 25	No	
	25 - 50	Yes	Do you have any family member(s) involve in the business?
	50 - 100	No	
	More than 100	Yes	Do you have a Buy/Sell Agreement?
Which legal entity best describe your business?		No	
	S Corp	Yes	Do you have a valuation method for your business?
	LLC	No	
	C Corp	Yes	Do you know when you want to retire? (or get out of the business to do something else)
	Sole Proprietorship	No	
Rank the priority for your business? 1 = #1 priority, 2 = #2 priority, 3 = #3 priority, 4 = #4 priority		Yes	Do you know how to take money out of your business other than salary and dividends?
	Retaining Clients	No	
	Retaining Employees	Yes	When the time is right, do you prefer to sell to 3rd party?
	Exit the Business	No	
	Increasing Revenue and Profitability		

Would you like to be interviewed?

Yes, the best time to reach me: (please circle one)

07 am EST

12 pm EST

05 pm EST

No

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## How to Complete Your Personal Survey

Remember that this is NOT a TEST. The value of your experience is COMPLETELY dependent on your willingness to be totally honest in your self-assessments. For each of the ACTIVITIES listed below, you will be asked to rate yourself in three areas:

**1. Rate your ABILITY to perform the ACTIVITY.** ABILITY is made up of four elements: knowledge, skill, experience and physical resources. Ability ranges from a low of "0" to a high of "12". For each of the activities listed below, ask yourself, "On a scale of 0 to 12 -- with "0" being "clueless" and "12" being "mastery" -- how would I rate my ABILITY to perform this activity?" and write down your answer in the box located under the ABILITY column.

**2. Rate the level of CHALLENGE or DIFFICULTY you feel the ACTIVITY represents for you.** CHALLENGE also ranges from a low of "0" to a high of "12". CHALLENGE is made up of ABSTRACT variables, such as opinions, emotions, hunches, instinct and intuition. For each of the activities listed below, ask yourself, "On a scale of 0 to 12 -- with "0" being "effortless" and "12" being "impossible" -- how would I rate the CHALLENGE or DIFFICULTY of performing that activity?" and write down your answer in the box located under the CHALLENGE column.

**3. Rate the level of IMPORTANCE the ACTIVITY holds for you.** IMPORTANCE reflects priorities, preferences and deadlines and also ranges from a low of "0" to a high of "12". For each of the activities listed below, ask yourself, "On a scale of 0 to 12 -- with "0" being "insignificant" and "12" being "critical" -- how would I rate the IMPORTANCE of performing this activity?" and write down your answer in the box located under the IMPORTANCE column.

Item #	Mission Critical Activities	Ability Rating: 1 - Low 12 - Effortless	Challenge Rating: 1 - Low 12 - High	Importance Rating: 1 - Low 12 - High
BVD_01	Earning profit on every client			
BVD_02	Earning profit on every product or service			
BVD_03	Diversifying revenue from products or services mix			
BVD_04	Diversifying client base			
BVD_05	Sustaining predictable revenue source			
BVD_06	Sustaining Pull marketing (doors swings in your way)			
BVD_07	Leveraging marketing space for maximum sales			
BVD_08	Determining the return on investment (ROI) of every productive employee			
BVD_09	Evaluating ROI with each employee and team			
BVD_10	Developing synergy among key management team			
BVD_11	Streamlining processes with maximum efficiency			
BVD_12	Leveraging technologies to systematize processes			
BVD_13	Positioning processes to generate profit			
BVD_14	Implementing a set of Key Performance indicators (KPI)			
BVD_15	Maintaining healthy profit margin			
NJ_01	Determine the right market value of your business			
NJ_02	Determine when to exit your business			
NJ_03	Replicate your current income for the next 20 to 30 years			
NJ_04	Convert the value of your business into cash			
NJ_05	Identify key value drivers for your business			
NJ_06	Transfer your business in the most tax efficient way			
NJ_07	Maintaining healthy profit margin even if something were to happen to you or your business			
NJ_08	Deploy measurable process to monitor business strategy			