



Moving From Working IN Your Business to Working ON Your Business Self Assessment Quiz

Instructions:

For each focus area listed below, choose the statement that you can most relate with. If you feel more comfortable between two options, feel free to give yourself half points (e.g. between 2 and 3, score yourself a 2.5).

While you may not actually relate to everything listed in your selected row, please select the row that best represents your level of involvement and attitude about the topic. Write your score for each area in the chart on the last page.

Policies & Procedures

| | |
|---|---|
| 1 | We don't have time to write policies. While it might be nice to have a documented procedure in place, we know what we need to know to get the work done so documenting it would take away from valuable time. |
| 2 | I personally write or review policies for my staff and actively encourage staff to document procedures. I know enough about what staff do daily that I can document procedures if necessary. |
| 3 | I think about policies that could help us better deliver on our promise to our customers and demand that our staff document procedures so that if someone leaves the company, we can quickly train new employees. |

Recruiting/Interviewing

| | |
|---|---|
| 1 | I fit interviewing in as needed since it must get done. I generally place the ads and call people who apply for positions. |
| 2 | I oversee some one who handles placing ads and interviewing and I am generally a second interviewer. I am involved in the decision of who to select. I may do a new employee orientation or training where I cover what needs to get done to handle the "work of the company". |
| 3 | I think about the types of people we need and communicate to others who find the individuals to perform in each role. If I am involved in the interview process, I generally introduce the company at a higher level and while I may provide my feedback on a decision of who to hire, I rely heavily on the supervising manager to make the selection. |

Team Motivation / Corporate Culture

| | |
|---|---|
| 1 | My team members are self motivating and the corporate culture develops on it's own. We're focused on doing the work of the company and people are motivated because they are paid. |
| 2 | I look to my team for their input and help form attitudes around a common point we can all agree on. I do employee reviews and help motivate team members by highlighting non salary benefits. |
| 3 | I think about the corporate culture we need to thrive and I look for new ways to motivate my team members and generally have someone help me implement the ideas. I look for creative ways to make our company a great place to work and set a tone that is contagious in terms of making sure we all do everything to exceed our customer's needs. |

Accounting/Finance

| | |
|---|---|
| 1 | I do the books and print the checks. I know exactly how much money we spend and take in every day. I create the invoices and mail them. |
| 2 | I check in and monitor someone who keeps our books. I sign checks and overall make sure the books are kept well. While I don't know about every transaction, I am knowledgeable about how the books are kept and could generate an invoice if I needed to. I may call customers who are late in paying. |
| 3 | I review reports from the accounting system (or reports from a manager) and help determine where we should put our limited resources moving forward (budgeting) and identify areas of opportunities for new business. I rely on someone else to track accounts receivable. |

Operations

| | |
|---|--|
| 1 | I spend time working on projects or general operations of the company. I may have helped make sure our server was working correctly. |
| 2 | I primarily spend my time overseeing people who are doing work for customers to help make sure quality is maintained. If our server is acting up, I can ask someone else to look into the problem and report back to be. |
| 3 | I think about ways that we could improve the operations of the company and look to others to make these ideas happen. If our server is acting up, I trust that others who worry about the day to day will notice and take appropriate action and I will never be involved. |

Brand

| | |
|---|--|
| 1 | Our brand is self defined by our customer's perceptions of what we do everyday so we really don't need to proactively define what our brand represents. |
| 2 | I work with others who help formulate what our brand stands for. I help find ways to represent our brand image to our customers and reinforce it in the actions of our team members. |
| 3 | I think about what our brand should stand for and help others implement actions that reinforce this vision. I think about other company's brands and where we should be relative to them. I can take time during the day to brainstorm on our brand. |

Customer Service

| | |
|---|--|
| 1 | I speak with customers daily to work on their problems and take care of their needs. Customers likely know my name since I work with them on projects. |
| 2 | I oversee people who spend time handling customer inquires. I attend select customer meetings that around more complex projects to help insure we do everything right. |
| 3 | I think about how our customer service is an opportunity to strengthen the relationship with customers and grow the revenue. I rarely meet with customers to review the execution of jobs. |

Marketing

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| 1 | We don't do formal marketing – rather we execute as the mood strikes us. We don't do much online marketing. |
| 2 | We've formulated a marketing plan and execute it. We've reviewed online marketing options and I have other people research the options and make recommendations. |
| 3 | I look for new marketing opportunities that could help us grow. We've executed online marketing activities. |

Sales

| | |
|---|---|
| 1 | I make sales calls as needed. |
| 2 | We have a sales person and I may go on select calls. |
| 3 | I think about new ways to get sales people excited and give them better resources they need to sell more. |

If I Take a Month Long Vacation...

| | |
|---|---|
| 1 | My customers will notice and work will not get done. |
| 2 | My team will keep doing their work but might not have all the direction they need, especially around unusual situations that occur. |
| 3 | The customers will not notice and the teams will execute according to plan and be able to handle unusual situations that occur with no problem. I can relax knowing things will be fine when I return from vacation and can look forward to learning about new sales, improved processes, and happy customers paying on-time! |

Your Primary Role Score:

| FOCUS AREA | SCORE |
|---|-------|
| <input type="checkbox"/> Policies & Procedures | |
| <input type="checkbox"/> Recruiting/Interviewing | |
| <input type="checkbox"/> Team Motivation / Corp Culture | |
| <input type="checkbox"/> Accounting/Finance | |
| <input type="checkbox"/> Operations | |
| <input type="checkbox"/> Brand | |
| <input type="checkbox"/> Customer Service | |
| <input type="checkbox"/> Marketing | |
| <input type="checkbox"/> Sales | |
| <input type="checkbox"/> Month Long Vacation | |
| TOTAL | |

| | |
|--|--|
| <p>Score of 10 – 15: Primary role is Doer</p> | <p>You focus on the day to day work of the company – the present. Primarily reactive to customer needs.</p> <p>Your company may be in early growth stage which would account for some of the need for you to wear many front line hats.</p> |
| <p>Score of 16 – 24: Primary role is Manager</p> | <p>You have other people helping you execute and you focus most on seeing that others execute to your satisfaction.</p> <p>Primarily focused on managing your company's response to customer's needs and issues and management of your team. Your company may be growing and in need of management staff to help free up more of your time for a visionary role.</p> |
| <p>Score of 25 – 30: Primary role is Visionary</p> | <p>You have the resources in place to execute and manage the work of the company and you focus on taking the company to another level – the future.</p> <p>Primarily focused on meeting future customer needs. You are likely creating a company that could one day be sold and operate without your involvement.</p> |