

0 = No/Nothing in place, 5 = Yes/Moderate Implementation, 10 = Yes/ Excellent, Currently being practiced fully

PILLAR		OVERVIEW	COMPETITORS	YOUR COMPANY	YOUR RANKING OVER 10	SOLUTIONS	Average	
1	FIRST STEPS							
a	Vision and Selling Point	Do you have a Vision? Do you have a compelling tagline?						
b	Market Research	Have you done any market research on your sector? Have you done a SWOT Analysis?						
c	Products(s)	What are your top 3 products and what solutions do they provide the market?						
d	Customer Niche/ Tribes	Do you have a UNIQUE customer base? Do you have a Keep In Touch Strategy? Have you segmented your customers?						
e	Business Model	Do you have a documented and strategic business model e.g. B2B or B2C or Retail model or mix? Cash flow or profit focus? Legacy or subsistence business?						
2	STARTING UP		Overview	Competitors	You	Your Co. Ranking	Action	AVG
a	Business Plan	Do you have a workable business plan?						
b	Costing of Services	Is your pricing model based on customer segment or business needs or a hybrid of both?						
c	Financing	Is your capital gearing based on borrowing or creation of revenue streams through unique ideas?						
3	IMAGE		Overview	Competitors	You	Your Co. Ranking	Action	AVG
a	Name and Logo	Do you have a unique and compelling company name and logo? Do you have brand colours and an identity that is easily recognised by your customer niche?						
b	Website	Do you have a website? Is it active? Does it reflect your brand? Does it allow clients to get in touch with you? Is it linked to your social media accounts? Does it have authentic content : pictures, video and or audio?						

4	<b>SOCIAL MEDIA</b>	Overview	Competitors	You	Your Co. Ranking	Action	AVG
a	<b>Facebook</b>	Do you have an active account? Is it a personal or company account? What % of company revenue is as a direct result of company ads on social media platforms? Are your accounts linked? Have you been able to create a community from your social media interactions? Are you able to track ranking, customer growth and retention and brand development from your social media pages? Have you been able to develop a crystal customer demographic from social media data?					
b	<b>Instagram</b>						
c	<b>LinkedIn</b>						
d	<b>You Tube</b>						
e	<b>Blog</b>						
5	<b>MARKETING</b>	Overview	Competitors	You	Your Co. Ranking	Action	AVG
a	<b>Materials/ Engagements/ Talks</b>	Do you have basic templates or standard forms for effective interaction with your customers?					
b	<b>Website and Digital Marketing</b>	Do you have a marketing calendar that outlines frequency and nature of posting? Have you done paid ads? What is the PTAT ratio and response rate on these? What is the ROI on your paid ads?					
c	<b>Advertising</b>	Do you have a marketing/ networking calendar and budget for the year?					
d	<b>Networking</b>						
6	<b>SELLING</b>	Overview	Competitors	You	Your Co. Ranking	Action	AVG
a	<b>Pitching, Preparation and Approach</b>	Do you have a standard business pitch that easily identifies customer segment, challenge and solution and communicates the same easily?					
b	<b>Customer Needs</b>	Are you clear about the unique challenges and expectations of each of your customer segments?					
c	<b>Features/ Benefits/ Objections</b>	Do you have products specifically defined to address customer needs? Are these products easily communicated and delivered? Do you have fall backs for product failure?					
d	<b>Closing</b>	How do you deliver value over price to your clients? Do you have a mechanism for closing out a sale?					
e	<b>Selling up and Selling on</b>	Do you have a method or template for tracking your selling process? How does your customer experience with regards to sales rank? Do you irritate customers through insistent selling or over selling and under delivering? How do you keep in touch and create community with the different customer segments?					
7	<b>BUSINESS &amp; PERSONAL FINANCE</b>	Overview	Competitors	You	Your Co. Ranking	Action	AVG

a	<b>Accountant/ software</b>	Are you currently using any accounting software for your company records?					
b	<b>Bank and Payments</b>	Are you banking with reputable institutions? Are payments whether mobile or bank in the company name?					
c	<b>Insurance and Personal Finance</b>	Are you and your company covered?					
d	<b>Legal Matters</b>	Do you have a company lawyer? Are your company items patented?					
e	<b>Budget and Expenses</b>	Do you have an annual company budget and expense plan? Is it reviewed and how often? How do you track expenditure and keep within budget?					
8	<b>CUSTOMERS</b>	Overview	Competitors	You	Your Co. Ranking	Action	<b>AVG</b>
a	<b>Staff</b>	Do you have staff? Do you have staff templates relating to policies, contracts, payments and mandatory deductions?					
b	<b>Partners</b>	Do you have partner MOUs? Are they communicated and understood?					
9	<b>HOME &amp; BUSINESS</b>	Overview	Competitors	You	Your Co. Ranking	Action	<b>AVG</b>
a	<b>Planning Ahead</b>	Do you have a company policy document, strategic plan or overall end game for the short and medium term extending up to 5-7 years?					
b	<b>Work Hours and Dependents</b>	Have you considered your work hours vis family time and work life balance? Have you put in place a guide for this?					
c	<b>Medical cover and personal expenses</b>	Have you considered key personal and home expenses and how to tide these over as your company matures? Do you have a nest egg for hard economic times?					

10	<b>PROFESSIONALS</b>	Overview	Competitors	You	Your Co. Ranking	Action	<b>AVG</b>
a	<b>Directory</b>	Do you keep a database of key professionals and companies crucial to delivery of your sector products and services?					
b	<b>Suppliers and subcontractors</b>	Do you have supplier contracts and data? Are they communicated and understood?					
11	<b>MINDSET MODEL</b>	Overview	Competitors	You	Your Co. Ranking	Action	<b>AVG</b>
a	<b>Success, Money, Fear</b>	Do you have mental assumptions that you and your staff follow regarding success, money and fear? How important is the right mindset to company success to you? Have you attended any mind set shift trainings or read a book on any? How do you rank mental focus in your company vs putting in place systems, processes and structures?					
b	<b>Wholesome Success &amp; Goal Setting</b>	Have you set any business and personal goals? Are they short, medium and long term in range? Are these incorporated in the company culture and brand?					
c	<b>Tracking and Growing</b>	How do you track your goals? Do you diarise SMART targets and review? Do you have affirmations, a vision board?					
d	<b>Sustaining the PASSION</b>	How do you PRIME for your day? Do you have a set of habits that you and your team practice daily to achieve set results?					
<b>PILLAR</b>							<b>RANKING</b>
<b>OVERALL ASSESMENT</b>							

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