



## Small Business Self Assessment

### Rate Your Effectiveness at Management

Crossing the bridge to success is a process. It takes time and a lot of work! Evaluate how your business is doing with our quiz below.

On a scale of 1 to 5, indicate whether you agree or disagree with the following statements from 1 (Strongly Disagree) to 5 (Strongly Agree). Answer each question and add up your score for each step, then check the scoring guide at the end to see your effectiveness at each step.

#### Step 1 – Blueprint – Know Where You’re Going

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| I don’t know much about leadership.   | 1 | 2 | 3 | 4 | 5 |
| My people don’t work as a team very well.   | 1 | 2 | 3 | 4 | 5 |
| More often than not, I am spread too thin.  | 1 | 2 | 3 | 4 | 5 |
| Different people or departments in my business are pulling in different directions. | 1 | 2 | 3 | 4 | 5 |
| I am not sure what kind of goals to make for my business.                           | 1 | 2 | 3 | 4 | 5 |
| I’m not sure what I want for the future of my business.                             | 1 | 2 | 3 | 4 | 5 |

**Total Score:** \_\_\_\_\_

#### Step 2 – Realize – Know Where You Are

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| I keep seeing the same mistakes made in my company.                                | 1 | 2 | 3 | 4 | 5 |
| I don’t feel confident that our product/service is consistent or high quality.     | 1 | 2 | 3 | 4 | 5 |
| My business keeps getting deeper into debt.  | 1 | 2 | 3 | 4 | 5 |
| I don’t think my business is making the right amount of profit at our sales level. | 1 | 2 | 3 | 4 | 5 |
| I have significant cash flow problems.   | 1 | 2 | 3 | 4 | 5 |
| I’m not really sure how my business is doing.                                      | 1 | 2 | 3 | 4 | 5 |

**Total Score:** \_\_\_\_\_

#### Step 3 – Inspire – Lead With Integrity

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| I’m not getting done the things I know I should to grow my business.              | 1 | 2 | 3 | 4 | 5 |
| No one can help me because my tasks are too detailed to teach to anyone else.     | 1 | 2 | 3 | 4 | 5 |
| I think one of our needs is to improve efficiency in the shop or at the job site. | 1 | 2 | 3 | 4 | 5 |
| We are doing lots of business but aren’t profitable enough.                       | 1 | 2 | 3 | 4 | 5 |
| We are facing foreign competition.  | 1 | 2 | 3 | 4 | 5 |
| The leaders in my business need to be stronger and more effective.                | 1 | 2 | 3 | 4 | 5 |

**Total Score:** \_\_\_\_\_

**Step 4 – Delegate – Excellent People for Excellent Results**

- I need more people to help me handle my business’ growth. 1 2 3 4 5
- I don’t have enough time to do all the work I need to do to run my business. 1 2 3 4 5
- I don’t feel like I can delegate as much as I would like to or find good people. 1 2 3 4 5
- My team does not communicate well enough with each other. 1 2 3 4 5
- Members of my team don’t know what other members are doing. 1 2 3 4 5
- There isn’t good coordination between departments/roles in my business. 1 2 3 4 5

**Total Score:** \_\_\_\_\_

**Step 5 – Growth – Profitable Growth for Longevity**

- We don’t have enough new clients. 1 2 3 4 5
- Our existing clients lack awareness of other products/services we could provide. 1 2 3 4 5
- One of our greatest needs is to increase sales/generate more business. 1 2 3 4 5
- I don’t feel like my business name is “out there” as much as I’d like it to be. 1 2 3 4 5
- I’m not sure what I’m getting for the marketing dollars I’m spending. 1 2 3 4 5
- I need to develop a plan to increase sales. 1 2 3 4 5

**Total Score:** \_\_\_\_\_

**Step 6 – Excel/Exit – When Your Customer Succeeds, You Succeed**

- My business may be growing, but it’s not really growing in the areas I want to. 1 2 3 4 5
- I don’t think my customers find my business different from my competitors. 1 2 3 4 5
- I want to find the right customers, not just whatever business comes my way. 1 2 3 4 5
- I have no idea who is going to be my successor when I sell my business/retire. 1 2 3 4 5
- I’ve made a succession plan, but I don’t know how to accomplish it. 1 2 3 4 5
- I don’t know if my business will just close when I retire or if it will continue. 1 2 3 4 5

**Total Score:** \_\_\_\_\_

**Scoring Guide: Use the categories below to interpret your score on each step.**

- 5-9 Expert: You’ve most likely got this step covered. Time to move on to the next step coming up!
- 10-14 Go-Getter: You may not have every single thing worked out, but you’re doing pretty well on this step.
- 15-19 Making Progress: You have some more work to do, but you’re starting to get a handle on this step.
- 20-24 Starting Out: You’ve started to get some of this step, but you’ve got a lot left to learn.
- 25-30 Beginner: This area may need your attention! You need to spend some time on this step.

**How did you do? Are there some areas where you excel? Do you need to improve in some areas?**

**We can help you improve your scores!**

**Contact us to tell us how you did at...**

**208-376-8808**

**or**

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