



Know Where You Are

By The FiscalDoctor®

Name: _____

As you build your personal and financial legacy, where is there a better, faster, safer road? On a gradient from 1 (That is not me) and 10 (That is me), select where you are inside the colored gradient. Use X = now or "n/a" + not applicable to spotlight and record your priorities and plans on each item below.

Not Me Me

1. Are operations running so smoothly at your company that you consistently sleep well at night?

Not Me Me

2. Are you REALLY sure your balance sheet is an accurate recording of your business TODAY?

Not Me Me

3. Are you satisfied with your capability to project available cash over the next six months?

Not Me Me

4. Are the key facts and measurements you need to run your business and accomplish strategic objectives readily available?

Not Me Me

5. Do you operate from at least a three-year strategic plan?

Not Me Me

6. Are you confident your company will meet growth in revenues and profits for the next 3 years?

Not Me Me

7. Do your competitors see you as their primary competition?

Not Me Me

8. Does your company stack up well against other companies in your industry in terms of fundamental financial measurements?

Not Me Me

9. Are you in a position to finance your growth plans?

Not Me Me

10. Do you really know your top ten customers both in terms of revenue and total profitability?

Not Me Me



Know Where You Are

By The FiscalDoctor®

11. Does everyone in your management team understand and support your corporate vision the same way you do?

Not Me Me

12. Are you in a position to seize market opportunities?

Not Me Me

13. Are you pleased with how your customers rate your company's performance?

Not Me Me

14. Are you seen as a successful leader who makes decisive and effective decisions?

Not Me Me

15. Does your management team think creatively? Are they "out-of-the-box" thinkers?

Not Me Me

16. God forbid, but you got hit by a bus tomorrow; do you have a trusted lieutenant who can keep your company on track?

Not Me Me

17. Do your vendors see you as a preferred customer, showing how well they value your relationship and business?

Not Me Me

18. Does your management team feel they receive information about your company and operations in an understandable and timely format to run their departments?

Not Me Me

19. Is your company prepared for the green economy?

Not Me Me

20. Is there no major improvement or a change that would significantly enhance the performance of your company?

Not Me Me

ACTION PLAN

What are your top three priorities?

1. _____
2. _____
3. _____

Who can help you?

1. _____
2. _____
3. _____

When to start?

1. _____
2. _____
3. _____