

# DIAGNOSTIC TOOL QUESTIONS

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## Step 1- Diagnostic

Please check a number between 1-5 for each question. 1 indicates that you **DO NOT** agree with the statement and 5 indicates that you **STRONGLY** Agree. Feel free to allocate numbers 2-4 for varying degrees of agreement as to how you feel about the statement.

The answer to each of the questions will be provided on a 1-5 scale and grouped into their categories for a total possible highest score of 300 or a lowest possible outcome of 60.

The results of your survey will be fed into our proprietary diagnostic system and we will produce a report for you to indicate the current state of health of your business. The report can also be used as a triage tool should you wish to proceed to coaching to highlight the areas of particular need.

Please note it is our intention that all results will be kept highly confidential and not shared. However, the aggregate of these answers across our customer base will be able to provide us with a benchmarking report that can be used for small business research purposes only to which you will have access.

No individual results are intended to be shown. This information will be very helpful in producing research to improve our community of businesses.

## AREAS OF PROGRAMMING:



## YOUINC

Thrive or dive! How are YOU set up for success?

- You wake up each day feeling energized and motivated.  
1            2            3            4            5
- You feel you have a clear purpose in your life and your work.  
1            2            3            4            5
- I have strong happy relationships with my partner and immediate family with regular communication.  
1            2            3            4            5
- Myself and my partner have no addictions to cigarettes, alcohol, sex or drugs (any), or similar.  
1            2            3            4            5
- I have hobbies an interests of my own in which I regularly take time out to pursue.  
1            2            3            4            5

## STRATEGY

Start it, grow it or scale it!

- My clients/staff are acutely aware of the overlying purpose and value of our business to the community.  
1            2            3            4            5
- My business has a clear vision of how the next 10 years will progress.  
1            2            3            4            5
- I have an effective written and regularly updated business plan for owners and shareholders to discuss.  
1            2            3            4            5
- I have set 3-5 clearly articulated goals for my business.  
1            2            3            4            5
- I regularly review and adjust my business plan at least quarterly.  
1            2            3            4            5

Total: \_\_\_\_\_

## MONEY

Money talks, bullsh\*t walks!

- I earn what I deserve and holiday when I want.  
1            2            3            4            5
- I am saving my earnings and building assets outside of my business including cash, shares, and property.  
1            2            3            4            5
- I have regular monthly reporting on my performance of the business including the balance sheet.  
1            2            3            4            5
- I am reinvesting back into the business.  
1            2            3            4            5
- I am regularly able to give time or money to charities.  
1            2            3            4            5

## OPERATIONS

How to be a smooth operator

- Our premises is well presented and adequate for our needs and future growth with lease up to date.  
1            2            3            4            5
- We embrace technology to add value to our staff and clients.  
1            2            3            4            5
- We are well insured for all possible risk events. E.g. Tax audit, death, fire, theft and damage.  
1            2            3            4            5
- Our business equipment and infrastructure allows to operate efficiently.  
1            2            3            4            5
- Management are efficiently running the operations of the business.  
1            2            3            4            5

Total: \_\_\_\_\_

## CLIENTS AND CUSTOMERS

Diagnosis, prognosis and prescription... with a whole lot of love!

■ We have a clear client value and service proposition.

1            2            3            4            5

■ We allow for client feedback and act on that feedback at least annually.

1            2            3            4            5

■ Clients find it easy to deal with us.

1            2            3            4            5

■ We embrace technology to help our clients do business with us.

1            2            3            4            5

■ Our product or service delivery experience is industry leading.

1            2            3            4            5

## PRODUCT OR SERVICE

Know your sh\*t!

■ I'm very well educated on my product or service.

1            2            3            4            5

■ I am expert or influencer in my area of business/ expertise.

1            2            3            4            5

■ My business is clearly differentiated from other competitors.

1            2            3            4            5

■ We provide a product or service guarantee to our clients.

1            2            3            4            5

■ We regularly elicit 360 degree from clients to improve our business.

1            2            3            4            5

Total: \_\_\_\_\_

## PEOPLE

The right people, at the right time, doing the right job!

- My staff all have clearly written and up to date job descriptions and contracts.  
1            2            3            4            5
- We have staffing problems- too many staff, too few staff, staff turnover or other red flags.  
1            2            3            4            5
- We have regular staff meetings including; daily huddles, weekly team meetings and monthly  
1            2            3            4            5
- Our staff has regular social events at least every quarter.  
1            2            3            4            5
- I feel I can leave the business for three months and the business would be fine without me.  
1            2            3            4            5

## MARKETING

Making relevant noise on the relevant platform

- We clearly articulate our value proposition to our ideal client market segment.  
1            2            3            4            5
- We have a regular flow of ideal clients to increase our revenue.  
1            2            3            4            5
- Our website is up to date, easy to view and mobile enabled .  
1            2            3            4            5
- We have referral sources that provide us a regular flow of profitable ideal clients.  
1            2            3            4            5
- Our social media strategy is up to date and regular posts whilst providing enquiries to the business.  
1            2            3            4            5

Total: \_\_\_\_\_

## INFLUENCE AND REPUTATION

Become an expert!

- I am highly qualified and experienced relative to my peers.  
1            2            3            4            5
- I have a good reputation in my industry.  
1            2            3            4            5
- I have a good number of subscribers on social media.  
1            2            3            4            5
- I have a good number of subscribers on my email list.  
1            2            3            4            5
- I am comfortable to promote my business and skillset for growth.  
1            2            3            4            5

## COMPLIANCE, RISK AND REGULATION

Watch your back!

- We know where our name registrations, URLs, licenses for operation etc are located and are up to date.  
1            2            3            4            5
- Our business is highly regulated by industry bodies.  
1            2            3            4            5
- I'm confident of our internal compliance procedures.  
1            2            3            4            5
- Penalties for non-compliance are high.  
1            2            3            4            5
- We use external compliance teams for advice.  
1            2            3            4            5

Total: \_\_\_\_\_

## EXIT

### Maximise your succession

■ I have a plan to exit my business or create a lifelong legacy to pass onto the next generation.

1            2            3            4            5

■ I know the value of my business.

1            2            3            4            5

■ I know how potential buyers would value my business.

1            2            3            4            5

■ My business is systematised, ready to sell if needed.

1            2            3            4            5

■ I have a documented succession plan.

1            2            3            4            5

## PHILANTHROPY

### Help the vulnerable and give back to your community

■ I have a dedicated charity or group of charities I support.

1            2            3            4            5

■ My charity is aligned to the purpose and mission of my business.

1            2            3            4            5

■ My staff and I currently donate money to charity.

1            2            3            4            5

■ My staff and I currently donate time to a philanthropic cause.

1            2            3            4            5

■ I have a plan to increase my support for my chosen charity when I am successful.

1            2            3            4            5

Total: \_\_\_\_\_

Total of all: \_\_\_\_\_