



Business Performance Evaluation

How well is your organization running? Get on the road to increased profits and sustainable growth. Use this evaluation to identify strengths and opportunities for improvement to determine where to start.



BLUE SAGE

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Strategy

Senior executives contend with attaining profitable growth, strategically managing costs and intelligently navigating risk. Such challenges require more than identifying new possibilities and making tough choices. They also require bridging the gap between vision and execution.

- ▶ We have identified appropriate Key Performance Indicators which are produced and reviewed regularly.

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

The company has a plan to grow through:

- ▶ Internal growth by leveraging existing product mixes and efficiencies
- ▶ New products/and or services
- ▶ Acquisition

Selling

The role that selling plays in the success of an organization is more than just working with numbers. The value that your customers place on you and your products/services is an extension of the service that you offer them and how efficiently you manage internal resources in the selling effort.

- ▶ The retention rate of customers is acceptable to our company
- ▶ We know our sales volumes by product/service and by customer
- ▶ We are satisfied with our existing structure for delivering our products and services to market (directly or through channels).

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Marketing

The Marketing of a company's products/services expands their opportunities for future business. The way that an organization finds and services their customers is as important as the products/services that they create for them.

- ▶ Most of our products/services are at the end of their lifecycle.
- ▶ We have a robust marketing mix that includes social media marketing and meets our marketing objectives.
- ▶ We have segmented our market and we're satisfied with our customer base

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Operational Efficiency

In today's rapidly changing global environment, it's increasingly important to evaluate and improve an organization's internal processes. A company's ability to increase profits may very well depend on its' ability to get products and services to market sooner, and with fewer defects and errors than ever before. In order to maintain financial efficiency, companies must strive to keep their processes lean and error free.

- ▶ Our organization is waste free – no overproduction, unnecessary movement of people or goods, or unnecessary processing.
- ▶ Our company quantifies, and is satisfied with, our cost of quality. These are the costs that you would not incur if everything is perfect
- ▶ Our company continually analyzes and improves its transactional and operational processes

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Finance

With suppliers raising prices, and customers pushing back on any proposed price increases, accurate forecasting and planning means the difference between success and failure. In times of increasing prices, companies find themselves going outside their national borders to keep material and human costs down or to increase their customer base. Controlling expenses and accurate forecasting are two very important traits of today's successful companies.

	Yes	No
▶ In analyzing product lines we take into account the total annual gross margin on each line to understand where our business is.	<input type="checkbox"/>	<input type="checkbox"/>
▶ We have an effective enterprise planning, annual budgeting and forecasting process.	<input type="checkbox"/>	<input type="checkbox"/>
▶ We have effective relationships with business advisors, including bankers, attorneys, accountants, investors, etc.	<input type="checkbox"/>	<input type="checkbox"/>

Technology

Business today depends on technology as never before – to drive transformation, productivity and global operations. Businesses that do not tightly link technology initiatives to specific, measurable business goals risk becoming uncompetitive and ineffective in this challenging environment.

	Yes	No
We understand the IT organization's greatest challenges and have plans in place to address these challenges.	<input type="checkbox"/>	<input type="checkbox"/>
We have identified the most important things/initiatives that IT needs to focus on to support the company business plans (both current and future)	<input type="checkbox"/>	<input type="checkbox"/>
Our organization is committed to a virtual global workforce and invests in the required technology and tools to support it	<input type="checkbox"/>	<input type="checkbox"/>
Our company leverages technology to reduce operating expenses.	<input type="checkbox"/>	<input type="checkbox"/>

Human Capital

The past few years have brought sweeping changes and new challenges to businesses. At the top of the list are globalization, innovation, changing workforce dynamics (aging workforce, Gen Y), evolving technology and intense regulatory environments. The implications of these changes are profound. Business-driven HR is a fundamental area for the forward-thinking organization.

- ▶ Our organization has a system that objectively measures organizational and programmatic outcomes and provides accountability.
- ▶ We have an effective enterprise planning, annual budgeting and forecasting process.
- ▶ We have effective relationships with business advisors, including bankers, attorneys, accountants, investors, etc.

	Yes	No
▶ Our organization has a system that objectively measures organizational and programmatic outcomes and provides accountability.	<input type="checkbox"/>	<input type="checkbox"/>
▶ We have an effective enterprise planning, annual budgeting and forecasting process.	<input type="checkbox"/>	<input type="checkbox"/>
▶ We have effective relationships with business advisors, including bankers, attorneys, accountants, investors, etc.	<input type="checkbox"/>	<input type="checkbox"/>

Scoring

If you answered "NO" to 5 or fewer questions, you may have some challenges in your organization.

If you answered "NO" to 6 to 14 questions, there are several issues that should be addressed.

If you answered "NO" to 15 or more questions, what are you waiting for? Give us a call!

We hope that this evaluation gets you on the way to uncovering areas in your organization that need improvement. We invite you to contact the BLUE SAGE team to address any of these issues.



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