
REPORT CARD

FOREWORD

The following is a report card for your business based on relevant factors and feedback from your mentor, and Board of Advisors.

GRADE KEY

- A- Exceed industry standards; point of success
- B- Above industry standards; positive effect on business
- C- Meeting industry standards; no positive or negative effects
- D- Below industry standards; causing difficulties
- F- Well below industry standards; harming your business

OVERALL GRADE

Mission and Vision					
The mission and vision are clearly documented appropriate, focused, and provide a clear goal	A	B	C	D	F
Management is excited and passionate about the goal	A	B	C	D	F
The mission and vision are clearly communicated to staff	A	B	C	D	F
The mission and vision are clearly represented through operations of the company	A	B	C	D	F
Notes:					

Strategic & Business Plans					
The business plan is feasible	A	B	C	D	F
The business plan is well documented	A	B	C	D	F
The strategic plan is relevant	A	B	C	D	F
The strategic plan is sound	A	B	C	D	F
Notes:					

Sales Growth & Cost Reduction					
Sales growth strategy and objective goals are in place	A	B	C	D	F
Sales growth is being achieved	A	B	C	D	F
Cost reduction strategy and objective goals are in place	A	B	C	D	F
Cost reduction is being achieved	A	B	C	D	F
Growth is at pace with supply	A	B	C	D	F
Notes:					

Product					
The product fills a needed service or function	A	B	C	D	F
The product is clearly positioned in the market	A	B	C	D	F
The product has measureable demand	A	B	C	D	F
The product line can be expanded or extended	A	B	C	D	F
The product consists of a healthy mix of different points in the product life cycle	A	B	C	D	F
The product is differentiated from the rest of the market	A	B	C	D	F
Product price is consistent with brand, quality, and demand	A	B	C	D	F
Notes:					

Customer Service					
Customers are quickly and efficiently helped	A	B	C	D	F
Customers are happy with the service	A	B	C	D	F
Staff are knowledgeable about the product or service	A	B	C	D	F
Notes:					

Marketing					
Channels of communication are effective and relevant	A	B	C	D	F
Marketing mix is effective and relevant	A	B	C	D	F
Marketing message is effective and relevant	A	B	C	D	F
Target market is clearly defined	A	B	C	D	F
Marketing strategy is clearly documented	A	B	C	D	F
Strategy is being implemented on schedule	A	B	C	D	F
Branding is relevant and cohesive with the product	A	B	C	D	F
There is room for market expansion	A	B	C	D	F
Notes:					

Market Share & Competition					
Company owns measurable portion of market share	A	B	C	D	F
Company has seen advancement of its positioning against competitors in the market	A	B	C	D	F
Management knows the competition well	A	B	C	D	F
Management knows the company position in the market	A	B	C	D	F
Sales team uses the position in the market to find customers and make sales	A	B	C	D	F
Population has knowledge of the company/brand	A	B	C	D	F
Notes:					

Human Resources					
Human Resources are cost effective	A	B	C	D	F
Human Resources employ effective customer retention and management	A	B	C	D	F
Human Resources are efficient	A	B	C	D	F
Notes:					

Management					
The business is effectively managed	A	B	C	D	F
The business is financially, socially, and ecologically ethically managed	A	B	C	D	F
Management motivates and inspires the staff	A	B	C	D	F
Management is organized and methodical	A	B	C	D	F
Management is accountable	A	B	C	D	F
Notes:					

Financial & debt management					
Debt is structured and repayable	A	B	C	D	F
Budget is relevant and on track	A	B	C	D	F
Notes:					

Operations					
Product / service arrives in a timely manner	A	B	C	D	F
Product/ service is up to standards	A	B	C	D	F
Operations complies with government rules and regulations	A	B	C	D	F
Notes:					

APPENDICES

APPENDIX A

Profit Driver Output

APPENDIX B

Metric Dashboard Information