



### ***Small Business Report Card***

Be brutally honest as you grade your company in each of the following areas. For best results, have other people in the company complete a copy as well.

**Grading Key:**

- A** = We are very **strong** in this area – and we are improving.
- B** = Generally, we are **functional** in this area. Occasional problems.
- C** = We're definitely **weak** here. Ongoing problems with this.
- D** = This is a **major problem for us**. Costing us money, time and people
- F** = **Where are we going and why am I in this handbasket?**

1. \_\_\_ Mission clarity, purpose, and company goals
2. \_\_\_ Brand health, reputation with our customers, our community, and our competitors
3. \_\_\_ Consistently productive staff
4. \_\_\_ Clear, timely, effective vertical and horizontal communications
5. \_\_\_ Egalitarian, creative, collaborative, and energetic team functioning
6. \_\_\_ Rational and respectful interpersonal communications at all levels
7. \_\_\_ Stable staff – very little questionable sick time or turnover.
8. \_\_\_ Clear, concise, and visible policies and procedures that updated regularly and used in training
9. \_\_\_ Structured, on-going, valued and effective training and orientation for new and existing staff
10. \_\_\_ Clear, realistic and accurate job descriptions and expectations
11. \_\_\_ Effective problem-solving mechanisms – clear lines of responsibility, focus on long-term fix for the problem, not blame
12. \_\_\_ Overall staff satisfaction, health and buy-in to the company's mission
13. \_\_\_ The right people in the right seats – including senior management
14. \_\_\_ Talented people are attracted to your company
15. \_\_\_ Clear, smart and regularly updated exit strategy for leaders
16. \_\_\_ Healthy ethical functions – honesty, clarity, high regard for personal and professional legal and moral obligations
17. \_\_\_ Timely, accurate and efficient accounting, invoicing, and inventory processes
18. \_\_\_ Strong operational efficiency with minimal waste
19. \_\_\_ Respectful, honest, clear, timely, and effective customer communications
20. \_\_\_ Realistic customer service timelines are in daily use
21. \_\_\_ Service and delivery – customers are overwhelmingly happy
22. \_\_\_ Customer response/follow-up – we really know how we're doing
23. \_\_\_ Effective business development processes – marketing, advertising, prospecting, organic growth and sales functions

Unhappy with your grades? Contact Trinity Operations Consulting for a free no obligation initial consultation!

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