

Growth Wheel Value Drivers Assessment

Current Status

Company Name _____	Poor		Good		Excellent
Business Concept					
1. Business Idea – product/service demand, size of market, competitive advantage	1	2	3	4	5
2. Product Portfolio – mix of product/services, uniqueness, innovation, new product development	1	2	3	4	5
3. Revenue Model – project vs recurring, payment terms, ease of invoicing	1	2	3	4	5
4. Customer Portfolio – concentration, segments served, average sales	1	2	3	4	5
5. Market Position – market share, geography, market awareness	1	2	3	4	5
Customer Relations					
6. Networking – well connected in industry, leads and ideas from market connections	1	2	3	4	5
7. Marketing – synced properly with sales effort, effective and efficient	1	2	3	4	5
8. Sales & Service – good market coverage, high customer satisfaction, proactive personnel	1	2	3	4	5
9. Communications & PR – well recognized in industry, involved, regular recognition in press	1	2	3	4	5
10. Branding – good recognition, highly thought of, diverse product line with similar branding	1	2	3	4	5
Operations					
11. Financials – received timely, high quality, analytical	1	2	3	4	5
12. Funding – available credit, good liquidity, strong credit rating	1	2	3	4	5
13. Production & Deliveries – efficient operations, high quality, timely delivery of product/service	1	2	3	4	5
14. IT Systems – current technology, dependable, meets other department needs	1	2	3	4	5
15. Facilities – suitable to meet employee and operational needs, positive environment	1	2	3	4	5

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Organization	Poor	2	Good	4	Excellent
16. Ownership & Board – supportive, independent, provides good governance	1	2	3	4	5
17. Employees – productive, efficient, positive work environment, low turnover, strong HR department	1	2	3	4	5
18. Partnerships – dependable vendors, suppliers, and service providers	1	2	3	4	5
19. Business Processes – efficient, documented, consistent with needs of organization	1	2	3	4	5
20. Legal Issues – proper documentation, no open legal issues, low legal exposure	1	2	3	4	5

Total of Score _____

Suggestion – Improving your score each year will significantly increase the likelihood of selling your company for its maximum value in the time frame that you would like to sell it. You will also likely meet more of your goals for the other stakeholders in your company, your retirement expectations, and the legacy that you desire to leave after you transition ownership.