

# Biz Whiz Success Program™

VERSION 4, 9/01

## PROGRESS CHART

Date	Points (+/-)	Score

We've identified the 100 key factors to consistent business success and profitability and grouped these into 10 distinct areas:

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## BIZ WHIZ SUCCESS PROGRAM 100-POINT CHECKLIST

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- A. Service Excellence
- B. Staff Management
- C. Planning & Strategies
- D. Sales Management
- E. High Productivity
- F. High Profits *Now*
- G. Empowered Leadership
- H. Trends & Ratios
- I. CEO Personal Balance
- J. Accounting & Taxes

#	SECTIONS									
	A	B	C	D	E	F	G	H	I	J
10										
9										
8										
7										
6										
5										
4										
3										
2										
1										

Congratulations for taking this one!

**Instructions for this program  
are on the last page.**

GIVE YOURSELF CREDIT AS YOU GET POINTS FROM THE 100-POINT PROGRAM. FILL IN COLUMNS FROM THE BOTTOM UP.

Developed by the staff, trainers and participants of

# COACH U, INC.



## A. SERVICE EXCELLENCE

- The firm has an objective system to quantitatively measure customer satisfaction.
- Quarterly meetings with key clients are conducted and changes made to service better.
- Standards and philosophies of your organization are known and enhanced.
- Staff learns from every mistake or client loss.
- Service standards are written and are very high.
- TQM (Total Quality Management) program has been created and implemented.
- Value is continuously being added to products and services, whether the customer asks for it or not.
- Service and requirements are fulfilled in record time, far faster than the customer expected.
- The firm has a strong reputation for being the best in delivering service.
- The firm knows what the customers want and need even before they do.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## B. STAFF MANAGEMENT

- Staff accountabilities are written and clear.
- Quarterly employee reviews are conducted.
- Staff reports to managers automatically.
- Each staff knows what their contribution is.
- Each employee is in the job that uses his/her strengths; there is no suffering or mismatches.
- Consequences are imposed for non-performance.
- Every employee is fully competent and skilled. No weak links or drag-me-downs. Every manager is qualified by experience, education, loyalty, motivation and competence.
- No one is coasting or being carried by the firm.
- Everything has a deadline or promised completion date and the employee and manager manage this.
- Staff want to come to work and are well taken care of at work.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## C. PLANNING & STRATEGIES

- The firm has a business plan that sets forth the strategic and operational objectives and programs for the year.
- Quarterly planning sessions conducted with managers and staff.
- The market for the company's product or service is good or excellent.
- The Business Plan is being used, measured against and updated at least quarterly.
- Well-sourced sales projections are used to establish inventory, personnel and cash requirements.
- The firm is going in a single direction and every major decision supports that direction.
- The company has more than sufficient resources to meet its short-range objectives.
- Adequate cash is always available for emergencies.
- The firm has the right consultant, coach, banker, accountant, attorney and other advisors to guide it properly.
- The company is not dependent on a single supplier.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## D. SALES MANAGEMENT

- Sales are being done only by those who can really sell. No extra bodies in the sales department.
- Sales people are managed daily or weekly on results and the source of less-than-quota results is known.
- Every sales person has a daily quota and they meet or exceed this quota, regardless.
- Sales people compensation is adequate.
- Sales staff is a team working on a daily goal together. Awards are given.
- Unit sales volume is increasing.
- Sales staff prepares sales projections and its performance against the forecast is monitored frequently.
- Sales staff is motivated, producing and excited about their success.
- Sales department maintains an attractive visual display of group and individual sales.
- Sales department staff is supported well by every other department and is cheered on.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## E. HIGH PRODUCTIVITY

- All paperwork is touched only once.
- Operations are fully computerized.
- Very, very few problems occur in any department. If they do, they are handled immediately and the source is eliminated. Firm is a "problem-free zone."
- A single individual has responsibility for the day-to-day operating decisions.
- Staff does very accurate work, nothing thrown together or substandard.
- Staff works hard and smart; no duplication.
- Decisions are pushed down as far as possible.
- Every meeting accomplishes something specific.
- Staff communicates everything that is getting in the way of their being productive and knows how to make requirements known vs. complaints.
- Staff has the equipment and training they need to *double* their productivity.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## F. HIGH PROFITS NOW

- The firm's profits are very, very high at a very conservative level of sales or a whole lot is being sold.
- Profitability is not an issue or a problem in the firm.
- Staff and plants are being utilized at 80% plus.
- Break-even levels are low.
- Services/products are packaged so that they produce a stream of income, not just a one-time sale.
- The company is profit-driven vs. merely revenue-driven.
- Budget variances are recorded, analyzed and managed.
- Individual responsibilities for achieving financial goals are clearly defined.
- The firm is one of the leaders in the market.
- The firm's pricing policy is not tied to the market leaders.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## G. EMPOWERED LEADERSHIP

- CEO has a strong vision and others have bought in.
- Firm has a simple mission statement.
- The firm's culture is cooperative vs. adversarial.
- The firm has very large goals and everyone is excited about reaching these goals.
- The CEO frequently interacts with employees at all levels.
- CEO initiates huge requirements.
- CEO is developing leaders, not just managers.
- Staff is proud of the high quality work they do.
- Firm is customer-sensitive and customer-driven.
- Staff is proud of their role in the success of the firm.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## H. TRENDS & RATIOS

- Debt service as a percentage of gross profit decreased last year.
- Ratio of the company's total debt to equity decreased last year.
- All accounts receivable are being collected per standards (average collection period is less than 150% of customer payment policy).
- G&A expenses are decreasing as a percentage of net sales.
- Profit margins have increased for core products or services over the last 3 years.
- No one customer accounts for more than 25% of total sales or receivables.
- Sales are consistent and increasing.
- Management turnover is less than 20% per year.
- Inventory turnover is high.
- Customer satisfaction and repeat buying is increasing.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## I. CEO PERSONAL BALANCE

- CEO has more time than he/she needs because everything is so well done or delegated.
- CEO has a right-hand person/executive assistant who handles every detail so the CEO has space.
- CEO has a strong, happy and healthy personal life with lots of physical activity and pleasure so work is work and not his/her life.
- CEO is adrenaline-free.
- CEO is putting aside plenty of funds with which to become financially independent.
- The company is always in good enough shape to sell.
- CEO has a strong personal foundation.
- CEO enjoys creating blockbuster results for the firm.
- CEO does his/her 10 daily personal habits consistently.
- CEO is proud of his/herself as a human and as CEO.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## J. ACCOUNTING/TAXES

- Bank reconciliation's are complete and up-to-date.
- All income, sales and property taxes are filed, paid and current.
- All bills are routinely paid on time.
- Payroll is automated, accurate and effortless.
- Inventory procedures are in effect that insure an accurate account of usable inventory at the end of each month.
- Accounts payable ledger is current and includes all bills and purchase orders.
- Firm is current with loan payments and is in conformance with all loan agreements.
- Accounting department is well run.
- Financial statements are done by 5-15th of month.
- Each department gets reports they need and use.

\_\_\_\_\_ **Number of boxes checked (10 max)**

## WHAT ELSE?

Please write down the additional things your firm needs to be successful. Check off when completed.

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## Instructions

There are 4 steps to completing the **Biz Whiz Success Program.™**

**Step 1: Answer each question.** If the statement is true, check the square. If not leave it blank until you've done what it takes for it to be checked. Be rigorous; be a hard grader.

**Step 2: Summarize each section.** Add up the number of squares for each of the 10 sections and write those amounts where indicated. Then add up all 10 sections and write the current total in the box on the front of this form.

**Step 3: Color in the Progress Chart on the front page.** If you have 5 checks in the Accounting section, color in the bottom 5 boxes, and so on. Always start from the bottom up. The goal is to have the entire chart filled in. This will indicate that you are managing your company well. In the meantime, you have a current picture of how you are doing in each of the 10 areas.

**Step 4: Keep playing until all boxes are filled in.** This process may take 30 or 360 days, but you can do it!! Use your coach or advisor to assist you. And check back quarterly for maintenance.

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