Company Self Assessment

The purpose of this questionnaire is to provide a systematic overview of the existence and maturity of key business processes within a company. C12 Chairs can use this with new or existing members to identify underdeveloped areas for possible focus to improve business performance. The questionnaire is organized into the following functional categories:

1. Core Principles
2. Strategic Planning
3. Human Resources Management
4. Financial Management
5. Purchasing
6. Customer Management
7. Operations Management
8. Ownership
9. Ministry

1. CORE PRINCIPLES

Core Principles are developed in a manner reflecting top leadership's heart and commitment while resonating as true with stakeholders. They're real, not just wallpaper.

	YES	NO
a. Have the mission/vision/values of the business been defined?	☐	☐
i. If yes, are they written? (If so, please attach a copy)	☐	☐
ii. Has it been communicated to the stakeholders?	☐	☐
iii. Do employees know them by memory?	☐	☐
iv. Are they routinely used to make decisions?	☐	☐
v. Do they relate the ministry goals of the business?	☐	☐
b. Do these core principles drive supporting operating objectives and Key Performance Indicators using SMART goals?	☐	☐
i. If yes, are they written?	☐	☐
ii. Are they cascaded down into the organization?	☐	☐
iii. Are results measured and compared to the goals?	☐	☐
iv. Are regular reviews held to discuss results and reassess goals?	☐	☐
• With management team?	☐	☐
• With other employees?	☐	☐

c. Are there any explanatory comments you'd like to share?

2. STRATEGIC PLANNING

	YES	NO
a. Does your team employ a specific strategic planning process?	☐	☐

If so, how much time is invested in this process, and when?

	YES	NO
b. Have you defined the target markets you serve?	☐	☐
c. Have you estimated the size of these markets?	☐	☐
d. Do you know your market share?	☐	☐
e. Do you know the projected growth of your markets?	☐	☐
f. Do they support the growth objectives of the business?	☐	☐
g. Have you modeled what would happen (i.e., necessary resources and likely financial results) if such growth occurred?	☐	☐
h. Do you know your competition well?	☐	☐
i. Have you assessed their strengths and weaknesses?	☐	☐
j. Have you assessed your company's strengths and weaknesses?	☐	☐
k. Have you assessed your threats and opportunities?	☐	☐
l. Have you developed a strategic plan to address these issues?	☐	☐
m. Have these plans been incorporated into the organization's annual plan (budget) and shared with those responsible as accountable goals?	☐	☐

n. Are there any explanatory comments you'd like to share?

3. HUMAN RESOURCES MANAGEMENT

	YES	NO
a. Have you identified the key HR needs of the business?	☐	☐
b. Do you perform candidate/employee assessments to identify strengths, weaknesses, behavioral profiles, core competencies, etc.?	☐	☐
c. Do written job descriptions exist, describing key responsibilities, skills required, training and educational requirements?	☐	☐
d. When hiring a new associate, are the following procedures used?	☐	☐
i. Written position statement (core competencies & deliverables?)	☐	☐
ii. Compatibility with Company Core Principles?	☐	☐
iii. Personality/Behavioral profiling?	☐	☐
iv. Personal, professional, and educational references checked?	☐	☐
v. Credit, criminal history checked?	☐	☐
vi. Multi-level interviews (e.g., line supervisor & peers) conducted?	☐	☐
e. Do you have a new employee orientation process?	☐	☐
f. Do you use a 'probationary period' before providing key benefits?	☐	☐
g. Is employee performance measured against written criteria?	☐	☐
h. Are employee performance reviews conducted at least annually?	☐	☐
i. Are action plans developed to address areas of deficiency?	☐	☐
j. Are employees equipped and encouraged toward decision-making?	☐	☐
k. Are they surveyed from time-to-time for input regarding company practices, policies, and their suggestions to improve things?	☐	☐
l. Do you promote team-building and enforce team behaviors?	☐	☐
m. Are pay/benefit levels competitive with local industry levels?	☐	☐
n. Is voluntary employee turnover a challenge for you?	☐	☐
o. Do you use 'performance pay' compensation approaches?	☐	☐
p. Are succession plans in place for key positions?	☐	☐

q. Are there any explanatory comments you'd like to share?

4. FINANCIAL MANAGEMENT

	YES	NO
a. Can/does the company generally pay its obligations when due?	☐	☐
b. Do you know your company's critical economic drivers and are these key financial metrics regularly discussed and 'driven' (i.e., 'scorecard')?	☐	☐
c. Are accurate & timely financial report provided at least monthly?	☐	☐
d. Are bank accounts reconciled monthly?	☐	☐
e. Is it done by someone without access to receipts & disbursements?	☐	☐
f. Are annual operating budgets, prepared in conjunction with those responsible for implementation, utilized?	☐	☐
g. Are financial results shared with employees?	☐	☐
h. Do you know your contribution margin & breakeven point?	☐	☐
i. Are short-term and mid-term cash flow projections prepared?	☐	☐
j. Is A/R and A/P aging data available, along with accurate inventory records, and are they used to help manage working capital and cash flow?	☐	☐
k. Do you benchmark performance against others in your industry?	☐	☐
l. Are actual costs compared to budgets for projects/jobs/products?	☐	☐
m. Is product line (or service offering) profitability monitored?	☐	☐
n. Is customer profitability monitored?	☐	☐
o. Are cost reductions actively pursued and celebrated?	☐	☐
p. Are company credit cards used by others beyond than the owner?	☐	☐
q. If so, does a written policy exist governing proper card use, & is card use monitored, comparing receipts to billing, by someone other than card users?	☐	☐
r. As God's steward, are you certain that you are producing a solid economic return on the financial assets employed in the company?	☐	☐

s. Are there any explanatory comments you'd like to share?

5. PURCHASING

	YES	NO
a. Is vendor performance monitored (i.e., cost, delivery, quality)?	☐	☐
b. Are multiple quotes obtained for items over a certain value?	☐	☐
c. Are vendor references checked regarding performance & stability?	☐	☐
d. Are authorized purchases documented via POs & contracts?	☐	☐
e. Are insurance certificates obtained to verify that vendors have adequate liability coverage for general, product & workers compensation exposure?	☐	☐
f. Are vendor relationships re-evaluated by getting new competitive quotes & assessing relative performance against best-in-class suppliers least annually?	☐	☐
g. Are key suppliers true operating partners that help you strategically rethink your business model to improve cost, lead-time, inventory and quality?	☐	☐

h. Are there any explanatory comments you'd like to share?

6. CUSTOMER MANAGEMENT

	YES	NO
a. Are your sales and marketing staff true operating partners, accountable for demand forecasts, timely orders, reasonable promises, & profitable pricing?	☐	☐
b. Do your prices properly reflect the value you provide customers and does sales compensation vary with gross profit (instead of simply sales)?	☐	☐
c. Do you know your target market customers and their attributes for each of your company offerings?	☐	☐
d. Do you monitor your sales to identify positive and negative trends?	☐	☐
e. Do you have specific criteria to measure customer satisfaction?	☐	☐
f. Are regular interdisciplinary meetings held to discuss/rectify customer satisfaction issues & identify additional sales opportunities?	☐	☐
g. Do you know why your customers buy from you?	☐	☐
h. Are you easy to 'find' for each target customer segment and do your marketing materials (print & web) tell your story well to overcome objections?	☐	☐
i. Do you know customer turnover/defection rates and why?	☐	☐

	YES	NO
j. Have you evaluated your performance during each customer 'moment of truth' (e.g., quoting, ordering, delivering, paying, field service, etc.)?	☐	☐
k. Do you include customers in a strategic process (e.g., focus groups, surveys, retreats) to identify how you can better serve them?	☐	☐
l. Have you identified your total business potential with each customer and channel of distribution you currently have?	☐	☐
m. Does your 'product planning' include 'fixing' or dropping unprofitable offerings?	☐	☐

n. Are there any explanatory comments you'd like to share?

7. OPERATIONS MANAGEMENT

	YES	NO
a. Does the operations team have daily/weekly clarity on orders, customer expectations, and priorities that tie to your official monthly 'plan'?	☐	☐
b. Have metrics been developed to help drive continuous improvement in operations (i.e., cost/quality/delivery)?	☐	☐
c. Does the company have a standard way of planning, managing and reviewing project performance?	☐	☐
d. Does this year's 'Plan' have Operations pursuing stretch goals (e.g., against previous costs/standards, industry benchmarks, past best performance)?	☐	☐
e. Is waste (e.g., cost of poor quality, rework, obsolete inventory, poor execution) measured and reported?	☐	☐
f. Are quality problems identified using internal and external (customer) reporting, and countermeasures implemented to eliminate the root causes?	☐	☐
g. Is material usage tracked by job/process vs. a budget/standard?	☐	☐
h. Have regular production 'set-ups' and changeovers been analyzed for time and flow improvement?	☐	☐

	YES	NO
i. Are schedules and workflow carefully planned to eliminate unnecessary changeovers?	☐	☐
j. Have order lead-times & inventory turns been compared to 'best' possible performance?	☐	☐
k. Have employees been trained in 'lean' principles?	☐	☐
l. Has the company used tools such as value-stream mapping, 5S, 'cell' workplace layout, etc., to identify productivity improvement opportunities?	☐	☐
m. Has management adopted defined approaches for recurring tasks (e.g., project management, decision-making, problem-solving, brainstorming)?	☐	☐

n. Are there any explanatory comments you'd like to share?

8. OWNERSHIP

	YES	NO
a. Does the business have multiple owners?	☐	☐
i. If yes, do formal agreements exist for the transfer of ownership?	☐	☐
ii. If no, do plans exist for ownership transfer?	☐	☐
b. Do plans exist for the transfer of key responsibilities?	☐	☐
c. Before the Lord, are the firm's equity owners 'equally-yoked'?	☐	☐
d. Beyond simply making a paycheck, are you generating a solid ROE?	☐	☐
e. Is your goal to ensure a future generational transition to likeminded leadership that will sustain Christian ministry in the business? (If so, how?)	☐	☐

f. Are there any explanatory comments you'd like to share?

9. MINISTRY INITIATIVES

Remember, only 40% of Americans say they are 'born again' and 8% have a Biblical worldview.

	YES	NO
a. Does company leadership openly share its Christian/Biblical faith?	☐	☐
b. Have you integrated Christian core values into the way you deal with people, issues, priorities, standards, etc.?	☐	☐
c. Has top management embraced and encouraged ministry?	☐	☐
d. Do you provide chaplaincy for your stakeholders?	☐	☐
e. Which of the following have you seen occur through your company:		
• Service: gifts, financial giving, practical help in Christ's name?	☐	☐
• Sanctification: believers equipped and encouraged?	☐	☐
• Salvations: people coming to faith in Christ?	☐	☐
f. Are employees encouraged to participate in ministry activities?	☐	☐
g. Do employees help identify and 'own' such opportunities?	☐	☐
h. Does the company provide ministry resources?	☐	☐
i. Does a ministry team or oversight effort exist?	☐	☐
j. Does the company &/or teams have a ministry plan & goals?	☐	☐
k. Are ministry results measured/reported/celebrated like other KPI?	☐	☐

l. Are there any explanatory comments you'd like to share?