



PRACTICAL STRATEGIES FOR SUSTAINABLE BUSINESS

**BUSINESS OWNER SURVIVAL NEEDS
PROFILE ASSESSMENT**

MODULE 1

MODULE 1 - OVERVIEW

ESS Module 1: Business owner survival needs profile assessment

- This module provides diagnostic tools to assess the survival needs of business owners and their businesses. It assists the owner in designing a development plan and indicates what learning outcomes the owner should achieve in securing the survival and growth of the business.

The diagnostic tools cover the following dimensions:

- Entrepreneurial skills
 - People development
 - Personal management
 - Leadership
 - Business management
 - Money management
 - Process management
 - Product development
 - Marketing
 - Sales
 - Customer order fulfillment
 - Human resources management
- It ensures that the owner understands that the survival of the business is a process where he/she has to re-learn the wrong attitudes, skills and bad habits and replace it with a sound small business philosophy and knowledge base. It provides the owner not only with a survival plan, but also with a new frame of reference ensuring success with running a small business.

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CONTACT DETAILS

Owner Name			
Name of Business			
How old is the Business			
How long have you owned the business			
Physical Address:			
Postal Address			
			Postal Code:
Web site	http://www.		
Email Address			
Telephone:		Fax:	Cell:
Date of Assessment:			

INSTRUCTION

Please respond to each statement either with a YES or a NO

1) PERSONAL MANAGEMENT

1. I know what I want to achieve in my personal life Yes No
2. I have a plan for achieving my personal goals Yes No
3. My business helps me to achieve my personal goals Yes No
4. I pay my personal expenses out of my business Yes No
5. I have problems in managing my own money Yes No
6. I manage my time effectively Yes No
7. I have a healthy balance between my business and my personal life Yes No
8. I have a clear picture of what I want from my business Yes No
9. I am so busy fighting fires that I never seem to get much done Yes No
10. I am disappointed with my business Yes No
11. My business is consuming my life and leaves me little time for myself Yes No
12. Thinking about my business sometimes generates anxiety in me Yes No
13. I wish I could improve the quality of my personal life Yes No
14. I wish I could get rid of my business Yes No

2) LEADERSHIP

1. I have a clear picture [vision] of what my business must become Yes No
2. I have validated the vision I have for my business Yes No
3. I have a specific business philosophy that works for me and my business Yes No
4. My employees see me as the leader of the business who has a vision for it and knows how to achieve it Yes No
5. My attitude and energy level inspire my employees Yes No
6. My employees are committed to achieve the vision for the business Yes No
7. My focus is on how to improve my business, not only on selling products or services Yes No
8. I believe I can develop my business to work without me Yes No
9. I am caught up in the technical side of the business Yes No
10. My business still excites me and I am passionate about it Yes No
11. The frustrations coming from my business are killing me Yes No
12. When things go wrong in my business I tend to blame people for it Yes No
13. I am good at motivating others Yes No
14. Innovation, measurement and systemizing my business processes are key values in leading and developing my business Yes No
15. I know what the success recipe for my business is Yes No
16. I have a strategic plan for my business Yes No
17. I experience problems because my business is growing too fast Yes No

3) BUSINESS MANAGEMENT

1. My business is dependant on a few key people and without them it will not work Yes No
2. I have sufficient measurements in place telling me how my business is performing Yes No
3. I know what the risks in my business are Yes No
4. I have plans and work systems in place to prevent or manage these risks Yes No
- When I encounter a frustration in my business I immediately introduce a work system
5. solution to eliminate or prevent the cause of the frustration Yes No
6. If I take a vacation my business would fall apart Yes No
7. My paperwork is usually behind schedule Yes No
8. My paperwork is disorganized Yes No
9. The waste in my business is too high Yes No
10. My business forecasts demand well and schedule employees accordingly Yes No
11. My business forecasts demand well and procures raw material/stock accordingly Yes No
12. My business is disorganized, reporting lines and accountabilities are not clear Yes No
13. My managers know how to manage Yes No
14. Managers and employees often complain about one another Yes No
15. I have a regular staff meeting to discuss business performance and to work out improvement plans Yes No
16. We monitor the effect of our performance improvement plans Yes No
17. I wish my business could run like a clock Yes No

4) MONEY MANAGEMENT

1. I am in control of the money side of my business Yes No
2. My business has a monthly income/expenditure statement Yes No
3. My business has a monthly balance sheet Yes No
4. My business has a monthly cash flow statement Yes No
5. My business has a monthly management report Yes No
6. My business has an annual budget Yes No
7. My business prepares forecasts Yes No
8. My business produces a monthly debtors age analysis Yes No
9. My business produces a monthly creditors age analysis Yes No
10. I understand the financial statements of my business Yes No
11. The main focus of my business' financial statements is to reduce statutory payments, e.g. tax Yes No
12. I have a monthly [regular] management meeting to analyse my management reports and to determine action plans on how to improve my business Yes No
13. My business uses an accounting software package Yes No
14. My business is profitable in terms of its financial accounts Yes No

15. I know what the break even point of my business is Yes No
16. I have sufficient financial control systems in place Yes No
17. I often do not have enough cash in my business to meet our needs Yes No
18. I have financial goals for my business Yes No
19. My business achieves its profit margins Yes No
20. I know how to calculate the value of my business Yes No
21. The amount of my business debt is killing my business Yes No

5) PROCESS MANAGEMENT

1. My business produces consistent and predictable results Yes No
2. I have identified the key processes in my business Yes No
3. The key processes in my business are well documented in terms of how they need to be performed Yes No
4. I have measurements in place to measure the performance of each key process Yes No
5. I know what outputs each key process needs to produce and at what level of quality Yes No
6. I have a system in place to keep improving my business processes Yes No
7. Our customers complain about our service or the quality of our products Yes No
8. I make use of the suggestions of employees to improve our processes Yes No
9. I make use of the suggestions or complaints of customers to improve our processes Yes No
10. We keep track of all customer complaints/ suggestions Yes No
11. My business produces consistent and reliable products and or services Yes No
12. The work procedures my employees need to perform are well described and documented Yes No
13. My managers are sure which processes they are accountable for Yes No

6) PRODUCT DEVELOPMENT

1. My business introduces new products regularly to keep up with the changing needs of the market Yes No
2. My business terminates unprofitable products timeously Yes No
3. We use customer input in introducing new products Yes No
4. It takes too long to produce new products in my business Yes No
5. Our products are well defined in terms of specifications and standards Yes No

7) MARKETING

1. I know what type of person is our most probable kind of customer Yes No
2. I know what the needs are of our most probable kind of customer Yes No
3. I know how the minds of our most probable kind of customers work and how they prefer to buy Yes No
4. I know what our customers think of my business Yes No
5. There is a difference in how our customers perceive my business and how I intend it to be Yes No
6. My business has a distinct image that attracts the right customers Yes No
7. My business symbols [logo, signage, interior, etc] reinforces the correct perception in the minds of our customers Yes No
8. I know the level of satisfaction of our customers Yes No
9. I have a marketing strategy that attracts and retains the right customers Yes No
10. We analyse the effect of our marketing spend Yes No
11. I know how best to reach our most probable customers with our marketing drive Yes No
12. We have marketing material which is appropriately focused on our most probable customers Yes No
13. We do enough marketing Yes No
14. I know what distinguishes my business from our competitors Yes No
15. Our customers know what distinguishes us from our competitors Yes No
16. Our marketing has a clear and consistent promise and message Yes No
17. I know how to appeal to the emotional needs of our most probable customers Yes No
18. We spend too much on marketing and get too little in return for it Yes No

8) SALES

1. We have a preferred sales process which yields consistent positive results Yes No
2. We ensure that our sales people are capable enough to execute the preferred sales process Yes No
3. We ensure that our sales people follow the preferred sales process Yes No
4. We analyze our sales by product Yes No
5. We analyze our sales by market segment Yes No
6. We analyze our sales by trading area Yes No
7. We analyze our sales by sales person Yes No
8. We phone our customers to determine their level of satisfaction Yes No
9. I know what the cost of sales/production/service is Yes No
10. My pricing allows for an appropriate gross profit Yes No
11. We follow up on all customer queries Yes No
12. We have a lead generation system Yes No

13. We know how to influence the decision making process of our potential customers in our favour Yes No
14. I know what our success rate is of converting leads into sales Yes No
15. We generate enough sales Yes No
16. I know how to overcome customer objections Yes No
17. I know how to increase sales from our existing customers Yes No
18. I know what our client retention rate is Yes No
19. Our customers pay us on time Yes No

9) CUSTOMER ORDER FULFILLMENT

1. Our customer order fulfillment process is reliable and produces what the customer wants, on time, at the right cost and quality Yes No
2. We sometimes run out of stock Yes No
3. Our cost of stock is too high Yes No
4. We have too much work in process Yes No
5. We waste too much Yes No
6. Our customers are satisfied with us Yes No
7. We lose too many customers Yes No
8. Capacity planning is a problem for us Yes No
9. I can rely on our suppliers Yes No
10. We are constantly in trouble with our customers Yes No
11. We can handle rush periods Yes No
12. I know where our bottlenecks are Yes No
13. We manage our bottlenecks well Yes No

10) HUMAN RESOURCES MANAGEMENT

1. My employees care for my business as much as I would like them to care Yes No
2. My business seems to attract and keep good employees Yes No
3. Employee problems take up too much time Yes No
4. We do employee performance evaluations well Yes No
5. Everything which needs to be accounted for in our business is allocated to someone who has accepted the responsibility Yes No
6. We have a training program in place for our managers Yes No
7. We have a training program in place for the other employees Yes No
8. I know what characteristics I want to see in my managers Yes No
9. My managers have these characteristics /skills Yes No
10. My business rules are in writing and all employees know these rules Yes No
11. My employees make too many mistakes Yes No

BUSINESS OWNER SURVIVAL NEEDS PROFILE ASSESSMENT

12. Most of my employees can perform more than one job Yes No
13. Each employee has a job description Yes No
14. I have systems in place to minimize dishonesty amongst our employees Yes No
15. I understand the most important labour relations prescriptions Yes No
16. I have an incentive scheme for my managers Yes No
17. I have an incentive scheme for my employees Yes No
18. I pay my managers well Yes No
19. I pay my employees well Yes No

11) GENERAL

1. I believe that I and my business will benefit if I get assistance in some of the knowledge, skills, techniques and or systems implied by the above mentioned questions Yes No Uncertain