

Money-Making Systems – Special Report Organizational Blueprint for Success

Here is a Special Report to use as a pre- and post- “check up” to survey your business as it is before reading and then after you customize and applying all the *Money-Making Systems* by DC Cordova with Carol Dysart to your entire business. DC and Carol congratulate you in your interest in doing whatever it takes to turn your entire business into a *money-making* system, and we invite you to apply the systems in the entire book in order to have a complete business make-over!



Use this survey as a SWOT* analysis:

*Strengths—things your business does well and better than its competitors...Weaknesses—areas your business does not do well, or that your competitors do better...Opportunities—positive things taking place in the economy and in the market place that your business can use to its advantage now or in the future, also the things it could be doing now but is not... and Threats—the negative things taking place in the economy, the elements that are potentially harmful to your business or may even be harming your business now.

Remember, the goal of any analysis (including the Personal Profile which you can take to see what needs motivate the people in your organization or team) make “the invisible visible.” You can do something about what you see that doesn’t work. What you don’t see will catch up to you with consequences – either now or later down the road.

Copy this Blueprint, then work with the first copy and date it, answering each one of the questions as honestly as you can. Your answers should state what is presently happening in your business or job environment. If you apply the proven tools and tips contained within, then the systems you fine tune from here will eventually free you to work “on” your business, not “in” it.

Answer as if...

You have been asked to supply the following information so you can sell your business as a smooth running organization. Or...

The opportunity just arose to go on an all expenses paid, three-month research safari/vacation. What systems would you need in your business if you were going to replace yourself with someone new to your role?

Apply the tips and strategies contained in this book to create your own systems that are predictable and proven... by you. And remember to note your progress and celebrate every little success along the way!

ORGANIZATIONAL BLUEPRINT PROFILE

Name: _____ Date: _____

Company: _____ Title: _____

Phone: _____ E-mail: _____

Industry: _____

Biggest Competitor: _____

YOU AND YOUR BACKGROUND

1. You have read and are applying the organizational tools contained within **Money Making Systems: For People Who Work with People** by DC Cordova with Carol Dysart Y ___ N ___
2. You are the: ___ business owner ___ partner ___ employee
3. What inspired you to ___ create ___ work in this business, organization or practice?

4. You have been in this role ___
0-1 years ___ 1-5 years ___ 6-8 years ___ 8 + years
5. There are _____ employees in the company and you direct _____ others.
6. You are in business to provide the following products and/or services:

CUSTOMERS

7. You have _____ customers on your database.
8. Each customer buys from you _____ times per _____
9. Your customers purchase _____
10. You have calculated each customer's lifetime value to determine how to best allocate marketing resources. Y ___ N ___
11. You convert small or occasional buyers into lifetime customers through small, *relationship marketing* strategies. Y ___ N ___ For example: You periodically acknowledge your customer's value to your business through thank you notes, rewards programs, small gifts or special discounts.
12. The results you intend your company to accomplish within the next 5 years are:

13. If achieved, your company's gross revenue will be \$_____ per annum.

14. This goal accomplished, would make possible the achievement of the following business goals: _____

15. If achieved, you would have a personal income of \$_____.

16. With that income, the goals you could accomplish would be: _____

17. My biggest "learning opportunity" to date is: _____

What this taught me was:

PURPOSE / MISSION STATEMENT

18. My organization's Purpose or Mission Statement is _____

19. Does everyone who works with you know what this is? Y ___ N ___

20. Are your customers aware of it? Y ___ N ___

21. How do you know they know, or where do you have it posted? _____

22. Do you have a long-term plan (more than five years) on the direction of the business? Y ___ N ___

23. If "Yes," what is it? _____

24. If "No," what is your five-year plan? _____

25. Do you intend to sell your business? Y ___ N ___

If "Yes," by when? _____

26. Have you shared this plan with your employees? Y ___ N ___

27. Do you speak with your employees about your plan and involve them in this goal?
Y ___ N ___

28. Do you speak with your customers about this plan and involve them in this goal?
Y ___ N ___

POLICIES AND PROCEDURES

29. Do you have an organizational chart? Y ___ N ___
30. Does every employee have a copy of it? Y ___ N ___
31. Is there a communication organizational chart that clearly shows the lines of communication and who should communicate with whom about what?
Y ___ N ___
32. Upon being hired, does every employee receive a Policies and Procedures Manual which includes all the *Rules of the Game* for working in your company? Y ___ N ___
33. Do you (or the head of the business) have an "open door policy"? Y ___ N ___
34. Is there a system for people to communicate upsets, grievances or questionable actions? Y ___ N ___
35. Do you have systems for handling internal requests for inventory, materials, printing, and duplication? Y ___ N ___
36. Are these systems documented within each department or job description?
Y ___ N ___

NICHE and PRODUCT or SERVICE

37. What is your company's niche in your industry? _____
38. Do your products and services meet your customers' needs? Y ___ N ___
39. Do your products and services need updating to stay competitive? Y ___ N ___
40. Are your products appropriate to your customer niche? Y ___ N ___
41. Are your suppliers giving you the best possible price and deal? Y ___ N ___
42. Are you a good customer to your suppliers so they will go out of their way to help you when needed? Y ___ N ___
- How do you leverage...
43. Yourself? _____
44. Your product? _____
45. Your best people? _____

RECRUITMENT AND HIRING (Skip if you have no employees)

46. How do you find your best people?
Recruiting firms ___ Advertising ___ Referred in by someone in our network ___
Internal promotion ___ Other: _____
47. Do you have in-house systems for profiling when recruiting? Y ___ N ___
48. What systems do you use? ___ DISC ___ SASQ ___ Myers Briggs ___ Holland ___
Other _____
49. Is there a documented job description for every position? Y ___ N ___

50. Does this job description include a Role Profile and a list of the personal behaviors the job demands most often of the employee? Y ___ N ___
51. Do you have a way to behaviorally profile your top three candidates to determine who to hire? Y ___ N ___
52. Do you screen for optimism and attitude factors? Y ___ N ___
53. How long does it take you to identify when you have hired the wrong person?
 ___ 6 months? ___ 9 months? ___ 1 year?
54. In which positions do you have the highest turnover?

55. What does this turnover cost your company on an annual basis?
 Executives \$ _____ Managers \$ _____ Employees \$ _____
56. Do you offer remuneration in line with what you expect from key staff members. Y ___ N ___
57. Are staff members rewarded and commended for work well done?
 Y ___ N ___
58. Are staff encouraged to take on additional responsibilities and to grow in their jobs? Y ___ N ___
59. Do you have clear employee policies and a description of what is "inappropriate behavior" on the job? Y ___ N ___

TRAINING, TEAM BUILDING, AND PERSONAL DEVELOPMENT

60. How much do you spend annually on staff and personal development training per person? \$ _____ annually.
61. Does this include Team Building and Management Development? Y ___ N ___
62. Does this include training to make the fullest use of the technology appropriate to their jobs – i.e. e-mail, Web site, phone systems, new technology, etc? Y ___ N ___
63. Does this include executive team and manager retreats? Y ___ N ___
64. How often do you hold team meetings?
 ___ weekly ___ bi-weekly ___ monthly ___ semi-annually
65. Do you have team alignment processes? Y ___ N ___
66. Do you have in-house systems for profiling everyone for training and development purposes? Y ___ N ___
67. What systems do you use for this?
 ___ DISC ___ SASQ ___ EQ ___ Myers Briggs ___ Other _____
68. Do you train them in how to identify the four major work style personalities – *Dominance, Influencing, Steadiness and Compliance*? Y ___ N ___
69. Does everyone know their own personality style based on the profiles, and are they encouraged to discuss their own style and compare the similarities and differences with others? Y ___ N ___

70. Do you make an effort to balance your team in terms of style? Y ___ N ___
71. Does everyone know their "blind spots," including how strengths are overused and affect others? Y ___ N ___
72. Do you teach "People-reading" skills to all employees that work with sales and customer service? Y ___ N ___
73. How often does a manager meet privately with each employee to review their strengths and weaknesses and how they adapt them for their job?
1 x/year ___ 2 x/year ___ Quarterly ___ Seldom ___ Other ___
74. Do you create a "Behavioral Action Plan" to set goals with each employee for use during employee performance reviews? Y ___ N ___
75. Does every employee know exactly what it takes to succeed on the job?
Y ___ N ___
76. Does every manager know the behavioral style and key motivating factors of each employee? Y ___ N ___
77. Do you know your own predominant behavioral style and what motivates you?
Y ___ N ___ It is _____.
78. Do you know the overall personality style of people in your company?
Y ___ N ___
79. Do you know the overall personality style of your customers?
Y ___ N ___
80. Do your salespeople know how to read and "adjust" their style to meet the needs of each customer? Y ___ N ___
81. Do you have a policy for handling arguments and personality conflicts?
Y ___ N ___
82. Today future change in business is imminent, have you considered this and the effects it will have on your staff? Y ___ N ___
83. Do you have a plan to help your people adapt to change? Y ___ N ___
84. Do you encourage your teams to go to courses, seminars and training programs so they can explore new educational technologies? Y ___ N ___
If Yes, what are some examples of these and how recently did they attend?

85. Was everyone on the team there? Y ___ N ___
If NO, why not? _____

CUSTOMER SERVICE

86. Do you have a way to collect clear feedback from your customers or clients so that you always have a current picture on how they feel about your product and know what other services they would like to be able to get from you?

Y ___ N ___ Explain: _____

87. Does every staff member know and strive to achieve YOUR stated standard of service? Y ___ N ___

88. Is it a key factor in their performance criteria? Y ___ N ___

89. On a scale of 1 to 10, where do you think your customers would rate your quality of service? _____

90. In order to truthfully answer the last question, have you actually surveyed your customers? Y ___ N ___

91. Did you send out a survey form to all or part of your customers? Y ___ N ___

92. If by mail, did you include a reply paid envelope for responses? Y ___ N ___

93. Do all staff members understand the importance of continually building customer relationships? Y ___ N ___

94. Do you use contact management software such as ACT, Maximizer or even Outlook Express to build up a comprehensive customer history that all staff can access? Y ___ N ___

95. Have you considered using direct mail for marketing? Y ___ N ___

96. Is there a documented procedure for handling customer complaints, including a follow up to ensure that the resolution was satisfactory? Y ___ N ___

PRODUCT DELIVERY

97. Have you established a delivery standard (e.g. same day if order is placed by a certain time?) Y ___ N ___

98. Do you have a system in place to monitor this standard? Y ___ N ___

99. Does your delivery driver or courier service reflect the image of service you want your business to project? Y ___ N ___

100. Does your business have a customer marketing relations system (e.g. the sending out of e mails and news letters on a regular basis?) Y ___ N ___

MARKETING AND SALES

101. How does your product or service solve problems your customers may have?

102. Do you have a systematized approach to marketing that makes your sales predictable? Y ___ N ___
103. Can you describe this approach? Y ___ N ___
104. Can your salespeople describe this approach? Y ___ N ___
105. Does your business have a Web site to educate your clients about your services and do you make sales through e-commerce? Y ___ N ___
106. If NO, is it time to reconsider this choice? Y ___ N ___ (See most recent edition of [Money-Making Systems](#) latest chapter on "Net-preneuring contributed by Excellerated's web engineer, Nami.)
107. Is your Web site quick to load and easy to navigate? Y ___ N ___
108. Is all the information on your Web site maintained and updated? Y ___ N ___
109. Do all the links work? Y ___ N ___
110. Do you have a way to keep your site listed with as many different search engines as possible? Y ___ N ___
111. Have you made it easy for your customers to place orders from your site – with each section on the order form clearly described, liberal use of drop-down menus, and as much stored information as possible so that the customer can key in an account number and/or password to quickly log on? Y ___ N ___
112. Do you use a secure server for credit card orders? Y ___ N ___
113. On a scale of 1 – 10, how effective is your Web site in marketing your business, products and services? _____
114. How would you like to improve your Web site? _____

115. Do you have a system in place to track all sales of your product and service from the moment your client or customer makes contact with you, to the point they receive their purchase. Y ___ N ___
116. Does every employee know this system? Y ___ N ___
117. Do your customers know this system? Y ___ N ___

TECHNOLOGY AND EQUIPMENT

118. Does the technology and equipment you have meet yours and your customers' needs? Y ___ N ___
119. Do you check regularly to see if your current equipment and technology is limiting your performance? Y ___ N ___

120. Have you investigated whether updating your equipment or technology would improve efficiency, increase production or increase costs. Y ___ N ___
121. Have you considered an *asset replacement schedule* to ensure you upgrade your equipment and software on a rotational basis so that you are not left behind? Y ___ N ___

OFFICE SYSTEMS

122. On a scale of 1-10, how organized are you, your office, and your business? _____
What change would make it a 10? _____
123. How does your desk look? Choose the one answer that fits you most of the time:
___ Like a bomb hit it. (I can never find anything. I spend hours looking for files and/or important papers)
___ It's messy... I like it that way. I know where everything is – even if no one else can find anything on it. (However, it would not be easy to step into my job).
___ It is somewhat organized. (Someone else could "find their way around it.")
___ It is perfectly organized (I always know where to find items and files, the systems are well documented, and if for any reason could not go to work tomorrow, someone else could easily take over my responsibilities.)
124. Do you know what systems are missing that would allow you to be more organized? Y ___ N ___ Explain: _____

(See *Money-Making Systems* - Chapter 2 – *Your Personal Productivity System*.)

COMMUNICATIONS SYSTEMS

125. Do you have an In/Out tray that is regularly used by everyone? Y ___ N ___
126. Do you have a system in place for your people to effectively communicate with each other without wasting a lot of time? Y ___ N ___
127. Do you use *Memo Systems* with duplicate forms or an electronic version of this? Y ___ N ___
128. Does everyone have e-mail or a physical mailbox for memos or notes from the team? Y ___ N ___
129. Do you have a documented system for handling the flow and management of paperwork? Y ___ N ___

E-MAIL

130. If you do not have e-mail, is it now time to reconsider this? Y ___ N ___
131. Do you check your e-mail regularly through the day? Y ___ N ___

132. Have you set a standard for responding to e-mails promptly: e.g. within ___ hours?
Y ___ N ___
133. Do you have a way to check that all staff are compiling with this standard?
Y ___ N ___
134. Do you encourage your customers to place orders by e-mail? Y ___ N ___
135. Do you have automated acknowledgements that send instant responses to your clients when orders are placed? Y ___ N ___

DESIGNING YOUR FUTURE

136. Looking at your answers, is there a problem or challenge in your business or organization that you would most like help with, or would like to find a solution for? What would this be? _____

137. Do you have a specific plan to support your own personal Success, Prosperity and Well-being? Y ___ N ___ What is this plan? _____

138. Would you like someone to contact you about personal or business mentoring for you and your team, or setting up your business along the suggested systems or principles taught in this book? Y ___ N ___

BONUS: Excellerated Business Schools for Entrepreneurs has many other resources and experts to help you in optimizing your business, subjects that this SWOT Analysis does not cover and are not directly addressed in our book, *Money-Making Systems*. Please go to the Excellerated Entrepreneurial Portal at <http://www.excellerated.com>, where you will find experts in all business area to support you further, including:

COMPETITION

Identify the strengths and weaknesses of your competitors and see how those factors may impact your business. Let them teach you how to run your business more effectively. Look at how you can attract the competition's customers to you... In areas where the competition is strong — e.g. price — do not be trapped into competing. Instead, look at other ways of setting yourself apart, perhaps, by offering superior service, faster delivery or by adding value in some other way.

YOUR FINANCIAL POSITION

Research indicates that around one-third of small business failures occur because of cash flow problems and financial mismanagement. There are a number of simple operations you should calculate on a regular basis to determine the financial health of your business. If you have never done this in the past, start now and keep records for the future so that you can compare them each time and take immediate action when there are unfavorable ratio changes. These financial ratios are divided into four categories:

Liquidity:

- Current ratio: (Current Assets divided by Current Liabilities) shows how many dollars are available to pay each dollar of current debt.
- Liquid ratio: (Current Assets minus Stock) divided by (Current Liabilities minus Bank Overdraft) shows dollars available to pay immediate debt.

Efficiency:

- Debtors' days: (Credit Sales divided by Debtors) shows average collection period of receivables and therefore the effectiveness of your credit management.
- Stock turns: (Cost of Goods Sold divided by Average Stock) measures effectiveness of inventory control.
- Asset Turnover: (Sales divided by Total Assets) measures business asset utilization.

Profitability:

- Gross Profit Margin: (Gross Profit divided by Sales) shows the percentage of every dollar of sales available to meet overheads and provide for Net profit.
- Net Profit Margin: (Net Profit divided by Sales) shows percentage of net profit remaining from every dollar of sales, reflecting management efficiency.
- Return on Assets: (Net Profit divided by Equity) shows percentage return on your investment in your business.

Financial Structure

- Gearing Ratio: (Total Liabilities divided by Total Assets) is an indicator of business risk.

Congratulations for completing this *Organizational Blueprint for Success*.

Now create your action plan as you read the complete book to see what is possible.

Money-Making Systems was designed to help you along your path to manifesting your true purpose and vision. Read and apply it, then review this Blueprint again in six months to see where you are then.

If you have any questions, visit our Web site: <http://www.excellerated.com>.

For further support, ideas or coaching in any of these subjects, please e-mail specific questions or write to us at admin@excellerated.com to request an appropriate *Money-Making System* or an *Excellerated Business Schools' Mentor*.