**Instructions:**

This insight sheet should take no more than five minutes to complete. It is a series of statements to which you know the answers. Tick either Yes or No and where you are not sure or it is not relevant place your tick in the ? box.

Just be honest with yourself and you should find the answers interesting and they may steer you in a new direction. Why not do this every six months to see if how your perception has changed.

| **Area** | **Question** | **Please tick**  |
| --- | --- | --- |
| **Yes** | **No** | **?** |
| **About me** | My business keeps me awake at night |   |  |  |
|  | When I go on holidays I can forget my business |  |  |  |
|  | I get paid a salary that matches my needs |  |  |  |
|  | I am able to put sufficient money into a pension each year to match what I will need on retirement |  |  |  |
|  | I have an exit plan |  |  |  |
|  | I have a written Strategic Plan that I review regularly |  |  |  |
|  | Profits in 2019 were better than 2018 |  |  |  |
|  | I take one day a quarter to be on my own and reflect on the business |  |  |  |
|  | I have a trusted advisor who I meet regularly |  |  |  |
|  | I would love to get out of this business |  |  |  |
|  | I know clearly the value of what I offer |  |  |  |
|  |  |  |  |  |
| **Sector** | I am in a growing sector |  |  |  |
|  | Price is sensitive in this sector |  |  |  |
|  | I am aware of changes coming down the track |  |  |  |
|  | This sector is vulnerable to technology |  |  |  |
|  | This sector is vulnerable to online sales |  |  |  |
|  | There is plenty of room for expansion |  |  |  |
|  | This sector will not change in the next 5 years |  |  |  |
|  | Brexit does not affect me |  |  |  |
|  | I am trading online |  |  |  |
|  |  |  |  |  |
| **Premises & Equipment** | These premises are fit for purpose for the next 5 years |  |  |  |
|  | My location helps recruit new people |  |  |  |
|  | I make the best use of these premises |  |  |  |
|  | My machines are replaced every 3 years |  |  |  |
|  |  |  |  |  |
| **Employees** | Everyone understands clearly what we offer and why |  |  |  |
|  | It is easy to recruit new people |  |  |  |
|  | I have contracts in place for all employees |  |  |  |
|  | I have a recruitment and onboarding process in place |  |  |  |
|  | Each employee has a training plan in place |  |  |  |
|  | I have an employee who I would not employ again |  |  |  |
|  |  |  |  |  |
| **Customers / Clients** | My customers fully understand everything we offer |  |  |  |
|  | People use my services regardless of price |  |  |  |
|  | Has anyone said 'I didn't know you did that' |  |  |  |
|  | I have planned meetings with client outside of projects |  |  |  |
|  | I have a good relationship with their accounts department |  |  |  |
|  | My customers would recommend me to a friend |  |  |  |
|  | I have a client/customer journey mapped out |  |  |  |
|  |  |  |  |  |
| **Suppliers** | I visit their premises once per year |  |  |  |
|  | I have a good relationship with their accounts department |  |  |  |
|  | Their reps call regularly with new products or ideas |  |  |  |
|  | I am important to them |  |  |  |
|  | I regularly compare them to their rivals |  |  |  |
|  | I know all they have to offer  |  |  |  |
|  | I am getting the best price  |  |  |  |
|  | They offer a consistent service |  |  |  |
|  | Brexit has not affected them |  |  |  |
|  |  |  |  |  |
| **Finance** | I have an up to the minute dashboard |  |  |  |
|  | I have 3 month cash flow projections |  |  |  |
|  | I have a good relationship with my bank |  |  |  |
|  | I have access to an emergency fund if required |  |  |  |
|  | I have a proactive accountant |  |  |  |
|  | I know the exact cost to deliver any one of my products |  |  |  |
|  | I am usually paid in less than 60 days |  |  |  |
|  | I am familiar with the all of the support services available to my business |  |  |  |
|  |  |  |  |  |
| **Marketing** | I have a written marketing plan and budget in place |  |  |  |
|  |  |  |  |  |
| **Technology** | I review my use of technology regularly |  |  |  |
|  |  |  |  |  |
| **Operations, Products & Services** | I continually adapt my offering to reflect the demand |  |  |  |
|  | I have introduced new products |  |  |  |
|  | I have a project journey mapped out |  |  |  |
|  | I invest in research and development |  |  |  |