

Performance Goal Chart

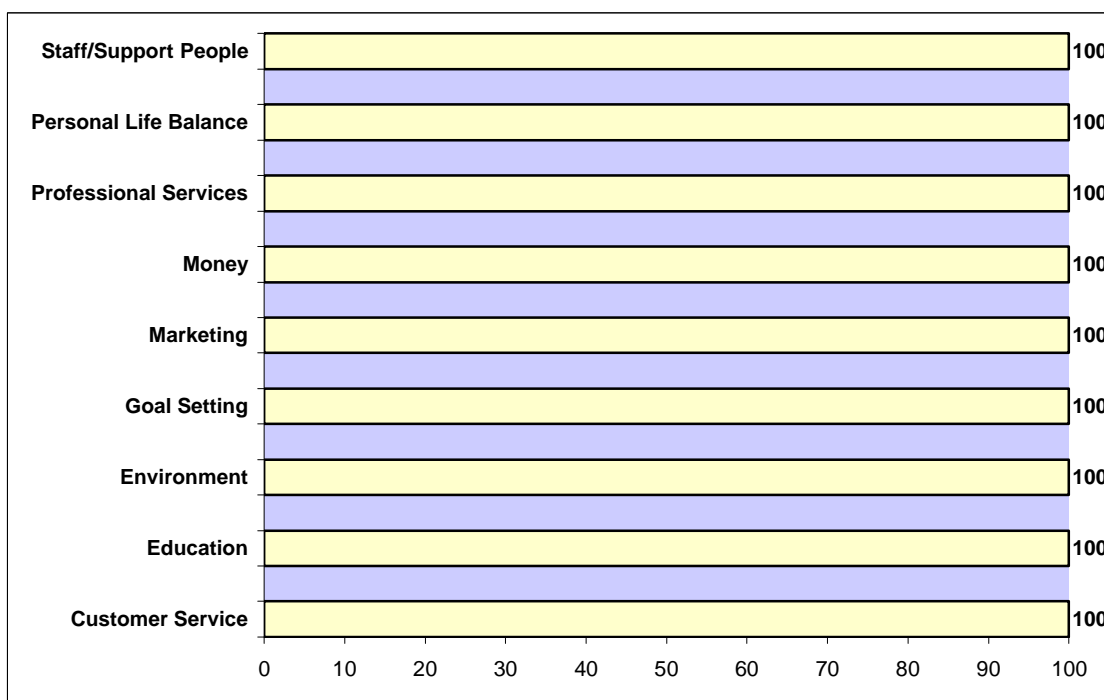
No matter which business life cycle stage your business is in, there are always areas of focus where improvements can be made. The performance goal chart highlights nine areas of focus of a successful organization. Review this chart. Out of a possible 100 points, where is the performance of your business in these areas? This isn't a contest: the more objective and realistic your answers, the more you stand to gain from this analysis. Consider and rate the performance of your business in these critical areas:

Performance Goal Chart		
Rating	Area	Evaluation Points
	Customer Service	<ul style="list-style-type: none"> • How effective is your business at servicing and retaining existing clients/customers? • How is your contact with past clients/customers? (Remember, they can give you powerful insights into why they are no longer buying from you, and what it would take to get them back.) • How effective are you at finding new clients/customer?
	Education	<ul style="list-style-type: none"> • Do you and your employees have enough product knowledge and training? Do you have the necessary skills to do your job effectively? • Is there an area where more knowledge would make you more effective? • Are you current with the latest technological developments in your area?
	Environment	<ul style="list-style-type: none"> • Is your work environment conducive to getting the most out of your working day? • Could you be more effective/efficient with changes or improvements? • What would the ideal environment be like?
	Goal Setting	<ul style="list-style-type: none"> • Do you have clear, concise business goals, both short term and long term? How realistic are they? • How effective are you at meeting them? Should they be reviewed? • Does your organization have a clearly articulated and widely understood vision, mission and purpose? How effective are you at actualizing these?
	Marketing	<ul style="list-style-type: none"> • How effective is your marketing strategy? • What do you know about your competition? • How is your product or service perceived in the marketplace? • What do you know about your clients/customers and their preferences? • How much value do you add to your product or service? • How effective is your advertising and sales promotion?
	Money	<ul style="list-style-type: none"> • Is there enough capital in the business to meet its needs? • How is your cash flow? • Are there adequate reserves of cash or convertible assets? • How profitable is your business? • How solvent are you? • Are there adequate reserves to meet tax demands and pay dividends?
	Professional Services	<ul style="list-style-type: none"> • Are you adequately covered against loss of key personnel? • Do you have insurance to cover loss of production or premises? • Disability or loss of earnings insurance? • Are you getting good value from your financial and legal advisors?

	<p>Personal Life Balance</p>	<ul style="list-style-type: none"> • Do you have interests outside the workplace? • Are you giving enough attention to family and other important relationships? • Do you have a life purpose, and are you on the path to fulfilling it? • Are you contributing to your community? • Do you have meaningful hobbies, activities and relationships outside of work; a reason for being, a focus, being of service?
	<p>Staff/Support People</p>	<ul style="list-style-type: none"> • How is staff turnover/absenteeism? • Do you have the right people in key positions? • Are your personnel policies above reproach? • How is communication in your organization? • Are people motivated to give more than you ask? • Would any of your people benefit from coaching?

Plot Your Results

Use the ratings you just supplied in the table above to plot your performance goals in this chart:



Action Plan

Using the performance goal chart you just filled in as your guide, which three to six areas would benefit from your immediate attention, and would make the biggest difference to you and your business? Using the following worksheet, list up to five action steps to be completed in the next 90 days, for each of the areas selected.

Performance Goals Action Plan		
Area	Current Situation	Action Steps
Customer Service Existing, new and past clients		1
		2
		3
		4
		5
Education Product knowledge and occupation specific training		1
		2
		3
		4
		5
Environment Maximizing the workplace for effectiveness and efficiency		1
		2
		3
		4
		5
Goal Setting Short and long term goals, vision, mission, purpose		1
		2
		3
		4
		5
Marketing Strategizing, advertising		1
		2
		3
		4
		5
Money Capital, cashflow, profitability, taxes, dividends		1
		2
		3
		4
		5
Professional Services Legal, risk management, insurances		1
		2
		3
		4
		5
Personal Life Balance Hobbies, activities, relationships outside work		1
		2
		3
		4
		5

Staff/Support People Hiring/firing, communication, motivation		1
		2
		3
		4
		5