

5 CRITICAL QUESTIONS YOU SHOULD BE ANSWERING



*Bringing awareness to the benefits of strategic
assessments for small businesses.*

TEAM

.....



Do you continuously explore ways to communicate and work better together?

- Organizational structure
- Personality profiles
- Engagement and responsibility
- Priorities

CORE

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Can you clearly communicate
your vision, values and
competencies to the team and
customers?

- Vision of success
- Values and strong beliefs
- Key skillsets that set you apart



OPERATIONAL

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Are processes documented so the team knows how to perform efficiently and effectively?

- Sales and marketing
- Costs and spending
- Product and service delivery
- Consistent processes



FINANCIAL

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Do you have access to, and know,
your most important numbers?

- Systems and reporting
- Data trends
- Key indicators and metrics



CUSTOMER

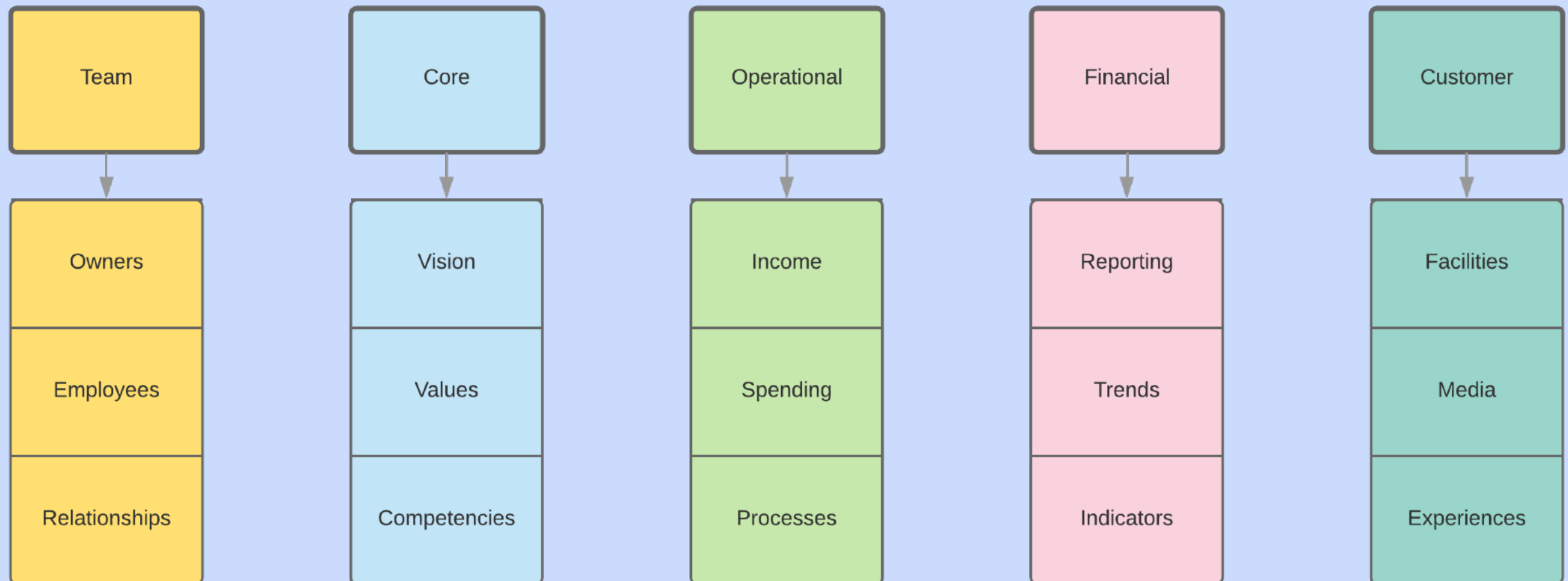
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What are the feelings and experiences realized by your customers?

- Physical facilities
- Social Media
- Interactions
- Feedback



CREATING AWARENESS PROJECT



Working better together, on the right things, to accomplish goals that lead to the vision of success.

STRATEGIC PLANNING AWARENESS PROJECT OUTLINE

The Process:

- Get to know each other. Brief visit with owners and employees.
- Owner interview. Lots of questions. Understand the business, workflows, products/services, personalities and financial performance.
- Team interviews. More questions. Gather ideas for improvement. Gain understanding of values and culture. Customer-facing experiences.

The Outcome:

- Present findings from assessments with actionable intelligence, takeaways, that can be implemented.
- Proposal for moving forward with ongoing coaching and monitoring, if desired.

Timeframe:

- Approximately 3 weeks.

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