



Business Success Assessment

Your Name & Title: _____

Email: _____

Phone: _____ Company Name: _____

Company URL: _____

To schedule your free 30-minute call, go to: <https://go.oncehub.com/DLcall>

Please complete the following **at least 24 hours** prior to our call to ensure that I understand how you define success as well as your performance metrics, people, and processes. If this is not completed at least 24 hours in advance of our call, your call may be rescheduled.

1) How do you define success for your business?

2) What performance metrics do you have in place for the following areas?

Metric Type	Metric Definitions
Financial	
Customer	
Marketing	

Sales	
Team (workforce)	
Operations (internal processes)	
Learning & Growth	
External (competition, labor market, economic factors, and regulations)	

3) People Assessment – Indicate how strongly you agree or disagree with the statements below.

	1 – Strongly Disagree	2 – Disagree	3 – Neither Agree or Disagree	4 – Agree	5 – Strongly Agree
I am confident in my ability to attract and recruit top talent for my job openings.					
I know how to hire the right talent and pick the stars to join my team.					
I have a great onboarding process so new employees start off right.					
I know how to engage with my employees and build relationships, so they maximize their effort and deliver the right results.					
I have regular performance discussions with my employees to set expectations and recognize and reward the right behaviors.					
I have at least 2 or more development conversations with my employees each year to					

understand their career goals and ensure they are growing the skills needed to reach my company's goals.					
I have the right compensation and benefits in place to attract, retain, and motivate my employees.					
I have an employee handbook that provides the information my team needs to understand the benefits and responsibilities of the employment relationship.					
I have a great process in place to pay my employees accurately and on time, and it is working well.					
I treat my independent contractors differently from my employees to ensure that I am not triggering employer obligations under federal and state laws.					
I am comfortable that I am complying with all the local, state, and federal employment laws.					
I am confident that the reporting relationships on my team and the way we delegate work is optimized.					
I have a process in place for employees who depart so they have a positive exit experience.					

4) Process Assessment – Indicate how strongly you agree or disagree with the statements below.

	1 – Strongly Disagree	2 – Disagree	3 – Neither Agree or Disagree	4 – Agree	5 – Strongly Agree
The company's purpose, vision, mission, and values have been communicated to the employees and they understand the impact of their work.					
I have a business planning process in place, and it is working well.					
My employees are productive and delivering the right quality to our customers.					

My employees have the right customer focus and know what is important to drive customer satisfaction.					
The communications internally between each employee and departments works well.					
The company's external communications are focused on the right things and are enhancing our brand with current and potential customers.					
We have a company goal setting process and those goals are shared with employees.					
Employees have their own individual goals and they are aligned to the company's goals.					
I am confident in my ability and that of my employees to manage their workload and prioritize the work activities each day.					
The technology used by the employees is optimized and helping us reach our goals.					
The company culture is what I want, and it supports exceptional performance from my team.					
My employees know how to lead themselves and others.					
I can count on my team to work together toward our company goals.					

5) What are your top 3 priorities for the next 90 days?