

## Introduction

Thank you for your confidence in BGS's SPARC Business Growth Framework in helping you begin to grow and establish a self-sustaining business. The purpose of this report is to provide you with the necessary insight to immediately put you on the right path.

The findings and recommendations that follow are specific to you and your business. The information was derived via the answers you provided in the 3 assessment tools you completed:

- *Personal & Business Goal Assessment*
- *Business Growth Assessment*
- *Revenue Engine Performance Checkup*

The recommendations in the Roadmap section at the end of the report are meant to provide you with a prioritized list of actions on which to focus. These actions are *specific to your current situation*. The information provided is based on both years of research on business growth and the more than 2 decades of helping small business owners, just like you, to move their companies through the stages of maturity toward business self-sustainability as found in our book [Business Growth Simplified](#). We have applied these principles directly to your situation and arrived with a tailored plan specific to the needs of you and your business.

## Findings

### Personal & Business Goal Assessment

The following are the observations from your answers on the *Personal & Business Goal Assessment* and our conversation after reviewing your assessment to verify and clarify your answers.

- You appear to be very family oriented and it has been the fuel that drives you to do what you do. Don't ever lose sight of this fact. Use it as inspiration to achieve what you want in life and business.
- You have a very altruistic motivation in your life. You should use it as a passion to motivate you to achieve whatever is necessary for business self-sustainability.
- It appears that this assessment process has sparked an understanding that you need to make business succession a priority.
- Your leadership to this point has created a very solid foundation. Assure you use this as a basis in selecting a successor so your work is not undone as you remove yourself from the picture.

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## Business Growth Assessment

The following observations are made based on your output from the *Business Growth Assessment Report*. The report is fairly comprehensive, however these additional observations are made based on the combined input of the other 2 tools: *Personal & Business Goal Assessment* and *Revenue Engine Performance Checkup*.

- Your business is very secure in the survival stage. You are caught in what we call “no where” land with a foot in survival and foot in self-sustainability stages.
- The growth report indicates you need to focus in 3 major factors
  - Strategy
  - Personnel
  - Systems
- Strategy within the assessment is driven by your exit and succession plans. Because you don’t have one this can be quickly rectified by focusing attention in this area and finalizing a plan.
- The fact that you have so many trucks on the road is a testament to the fact that you have solid operational and sales systems. If you didn’t, you wouldn’t be able to maintain your current volume. So the focus is less on these functions and more on your personnel systems.
- The personnel and systems factors are probable very closely related. Maybe it is the reason you’ve had problems scaling in the past. If you cannot quickly find and hire techs your growth is hamstrung by this weak link in the chain. Fix it and you will scale more quickly.

## Revenue Engine Performance Checkup

The following observations are made based on your output from the *Revenue Engine Performance Checkup*. The report is meant to begin bringing clarity on those tactical functions that may be underdeveloped within your business. The report output is meant to be general in nature to provide insight into why certain things are important to managing your business. The additional observations made here are based on the combined input of the other 2 tools: *Personal & Business Goal Assessment* and *Business Growth Assessment Report*.

- You have a good idea of where you want your topline, however you don’t have a good understanding of what it will take your team to get there.
- You’ve had fairly good success with your sales and marketing efforts. However, you don’t understand the cause and effect of these functions. Getting better insight on your marketing metrics will create a roadmap to achieve your revenue goals.
- Expansion costs you in every aspect of the business. You need a better handle on what those increasing costs will and when they will occur so that you don’t get blindsided at the peak of your growth and have to stop to fix problems that your revenue engine is already predicting!

## Marketing Direction Roadmap

Based on the findings outlined in the previous 3 sections here are the recommended next actions to begin moving your business forward and put yourself firmly into the next stage of the business growth cycle:

Priority	Recommendations	DIY Resources
1.	Get clarity on your life’s goal and how your business supports this goal. This provides you with a basis for ALL your decision making going forward and helps you stay motivated during the tough times and hard decisions.	Step 1 of the SPARC Cycle and Step 2 (Begin with the End in Mind) of <a href="#">7 Habits of Highly Effective People</a>
2.	The fact that you do not have financial parameters you manage to month-to-month doesn’t give you the insight as to whether you’re on-track to hit your profitability goal for the year without doing an in-depth analysis every month.	Read blog post <a href="#">How to Get Laser Focused on Hitting Your Profitability Goal.</a>
3.	Consider developing your management team, including identifying and hiring your successor a more urgent priority. This give you more leaders for your systems implementation which will help get better solutions and greater buy-in using the systems by having them involved with both the solution design and implementation.	Make <a href="#">Leadership</a> a regular part of your reading and make <a href="#">Business Success Through Self-Knowledge</a> by Dr. William Anton a priority on your reading list.
4.	To work on 2 of your current <i>growth factor</i> weaknesses – personnel and systems as part of your hiring a successor by focusing on strengthening your personnel system.	Read through <a href="#">human resources</a> category on <a href="http://yoursmallbusinessgrowth.com">http://yoursmallbusinessgrowth.com</a> or discuss this with an HR expert.
5.	You need better insights into what makes your operation tick and develop the metrics and reporting that allow you to predictively manage your day-to-day operations.	Step 3 of SPARC Business Accelerator Training: <a href="#">Calculating Your Revenue Engine’s Horsepower</a>
6.	Use your findings from #1, #4 and your Business Growth Assessment Executive report as the basis to conduct an owners/managers planning retreat. Based on your rediscovered life goal, develop your long-term business vision. Where do you want your business to be 3 – 5 years down the road. Then determine what you feel can be realistically accomplished in the next 12 months and develop your business plan.	Step 4 and 5 of the SPARC Cycle: Business Accelerator Training: <a href="#">High Impact Business Planning</a>

Priority	Recommendations	DIY Resources
7.	Use your clarity of your business plan to begin understanding the timing of potential capital investments in the business. Determine approximately how much you will need and make these financial objectives within your business plan.	Talk with your banker & other funding resources about requirements so you're prepared when the time comes.
8.	Accountability is paramount to business self-sustainability. Institute the necessary performance evaluation systems in place to monitor and enforce accountability across the business as you begin hiring your management team.	Read the article <a href="#">5 Steps for Creating Accountability in Your Business</a>
9.	While the fact that you have been profitable over the years is good, it is not enough to hope. You must make your desired percentage profitability a requirement and hold the management team to accountable to achieving it. If you don't then your independence from your business will not be secure!	Use the resources from #2 and # 8 in approaching this action item.
10.	Time management seemed to be a root-cause issue to much of your anxiety. You might consider a comprehensive time management process, not just tools, to help you get better control of all the responsibilities they you have.	DE, Inc. recommends <a href="#">Totally Relaxed Organization (TRO)</a> as a process for time management. Has a strategic partnership with Priacta in offering this to our clients.
11.		
12.		

*You can assure your roadmap action items are accomplished and the outcomes achieved by using a business advisor to hold you accountable and assure you stay on track to achieve success. You can contact DE, Inc. to arrange for business advisor assistance.*