

# Business & Personal Goal Assessment



**1) How do you feel about life right now?**

Things seem to be moving in the right direction, however I wish it would happen a little faster!

**2) What one thing are you most proud of in the last year? In your life overall?**

The fact that we took on more trucks and drivers and kept ahead of the added expenses with sales.

I am most proud of the great kids that we have raised. They are all out and on their own now and contributing positively to our community. What more could a parent ask for?

**3) If you could change one thing about your life what would it be?**

That I got to strapped to the business and was not able to spend more time with my children while they were younger. That is something that I can go back and change. It is gone forever, I don't want that to happen with my grandchildren, so I need to do something different with the business or the cycle is doomed to repeat itself.

**4) What do you want out of life?**

The independence and financial freedom to do more in the areas that I have a philanthropic passion – teaching others and helping those less fortunate!

**5) What do you want to give to your family?**

Leave a legacy that allows them to participate in those “once in a lifetime” experiences when they present themselves. That means greater financial capacity than we currently have.

**6) What do you want to give to your community?**

To be able to make a real impact with those less fortunate by providing them a “hand up.” If these are fewer people in our community when I die then I will have done what I could.

**7) What do you want to give to your profession?**

Be an example to what is possible if you run a fair and honest service company.

**8) How do you think you could use your business to do these things in#4 - #7?**

Absolutely!! That's why I started it 20 years ago. I just can't seem to find the right formula to get me there and keep me there! I am hoping that this Business Growth Simplified program is the answer I've been searching for.

**9) What is your vision for your business?**

To build a company recognized as the premier supplier of service in our metro area by helping our customers get back to *life as normal* by providing efficient, high quality service

**10) What keeps you up at night about your business?**

What happens to all this if something happens to me? The "hit by a bus" scenario scares the heck out of me. What would my family do if they were left to clean up the mess that is this business? That's why the concept of business self-sustainability is so intriguing to me.

**11) What one thing would you like to change most about your business?**

The inability of the business to not operate if I am not there for an extended period of time.

**12) How long do you see yourself doing what you are currently doing?**

Not sure I see an end in sight. But, I'd like to be able to retire in the next 5 years.

**13) What is your plan for making this happen (exit strategy)?**

Don't really have one! I guess I always thought I'd sell the business. But, when I met with a business broker and she told me what it I could get for it, I was nauseous. There is no way we could retire on that amount!!!

**14) What are the top 3 risks that you see in your business right now?**

- 1) Cash flow during the down season
- 2) Finding that person who could run the business instead of me.
- 3) What happens to the business if something happens to me?

**15) Could you see any of those risks affecting your personal life or quality of life in general? If so which one(s) and why?**

#3 for sure. #2 just seems to feed #3. #1 is just the way that it is. We've survived in the past so we'll survive in the future.

**16) How do you think people feel about working here? (what kind of turn over do you have)**

We have a great team. Everyone seems to love working here. Other than the people we've hired expanding in the past year, our employees have been with us 3 years or more.

**17) What is your relationship with your employees like?**

I feel like their my family and take care of them that way. I know people say I shouldn't get that attached but it just who I am.

**18) If you had to let someone go how would it make you feel?**

Pretty bad, unless there was a complete breach of trust. But, I could do it if everyone else in the company depended on it. I've done it in slow times in the past.

**19) Do you enjoy coming to work? Why or why not?**

I do. I love dealing with the people, both the employees, vendors and customers. I'm just a people person!

**20) What short-term business objectives are you currently focused? Why?**

- Getting our systems refined to make it easier to grow the business to \$3.5 million.
- Being more aware of what we're spending to get a better net profit month to month.
- Apply the *Business Growth Simplified* strategy and get the business to self-sustainability.

**21) GO BACK TO 9): How would these new ideas and realizations change your vision for your business?**

I might, I realize that all my focus is on achieving a *business mission* and I'm not focus what we need to do to address the problems that we face that help me realize what I want personally. (*I guess this assessment worked!*)

**22) DO you feel your business vision is aligned with your personal goals & values? Why or why not?**

NO! I just realized that in #21.

**23) If they were, how do you think it would improve you quality of life?**

I would get rid of the things that keep me up at night. I just need to make those things a priority!!!

**24) How do you feel your current business objectives are helping you move toward your vision?**

NO, because there is nothing in there about finding someone to replace me or to make the business self-sustaining!

**25) What do you feel are the top 3 obstacles keeping you from achieving your vision and why?**

- Not having the right goal and objectives as part of our plan.
- ME!! If knew what to do I should have already done it.
- Not knowing what the missing pieces of our business is so we can have business self-sustainability.

**26) What is your current income goal for your business?**

\$2.8 million for this year and \$3.5 million next.

**27) What is your current average monthly revenue?**

We do \$185K per month. It can vary from \$145K in the slow months and \$210K in peak months.

**28) How many different sources of revenue do you generate under your current business model? List these current sources.**

Four in the following descending order:

- 1) Appliance Repair
- 2) Appliance Installation
- 3) Repair Materials
- 4) Appliance Sales