



Why Should You Take This Checkup?

This questionnaire is designed to get you to take a hard look internally - to uncover your “low hanging” opportunities for immediate (and powerful) improvement. Don't try to overthink the questions - they're really not complicated at all.

Just answer honestly and quickly. Your first assessment is usually the most accurate. So, resist the urge to go back and change your score on a question or two (or more). Let what you put down the first time be your final answer.

Most importantly, keep your answers focused on where you are right now, not the past or even the future, and answer honestly - even in places you wish you could answer differently!

First, the Basics of Your Company

We'll start with background questions.



What one thing would you consider a dream come true for your business within the next 12 months? Something that would go in the history books as a great accomplishment for you and your business... In 50 words or less, describe that success.



Describe your best sales professional, sales promotion and/or sales method. What makes that person, program or activity stand out? How is this person, program or activity different from the rest of your sales team or other sales methods?



Think of a recurring “fire” in your business. Something that happens regularly – maybe it’s monthly, weekly, or daily. Regardless, it redirects your attention or that of your staff. In 100 words or less, please describe that problem (your regular “fire”), and what you’ve tried so far to eliminate it.



Please describe your most direct competitor. The one company you face on a regular basis in your market. The one that makes your sales people or you squirm from time to time. How is your company superior? (for example: product innovation, customer service).

ZONE + Focus Questions

Perhaps you've already pondered some of these questions on your own. That's great. We now want to dig a little deeper. Instead of a simple yes/no answer, please indicate your answer based on a scale of 0 to 10. Use a 0 to indicate a "we don't do that" response, and 10 if you can answer "yes, we do that and we do it exceptionally well."

Zealous Planning Questions to Consider	Score (0 to 10)
All owners / decision makers participated in creating our current Strategic Plan. (If you don't have a strategic plan, this should be a 0 answer to all of these questions.)	
Once completed, all owners / decision makers agreed to their part in achieving the current plan.	
Our plan has been presented to all the members of our company.	
Every member of our organization can rattle off the top 5 goals for the company for the next quarter.	



Every member of our organization can quickly explain their own top 3 goals for the next quarter.	
Every member of our organization understands and can articulate how meeting their goals will help the company reach its goals.	
Our Strategic Plan has been reviewed and adjusted within the last 12 months.	
Our Strategic Plan would withstand a catastrophic event in our marketplace. We have well-formed contingency plans in the event of a dramatic market shift.	
Our current Strategic Plan is an improvement over our last major version. We've made significant improvements compared to the previous plan.	
Our current Strategic Plan has been reviewed, challenged and improved through the use of experts outside our company.	
Zealous Planning TOTAL	
(divide TOTAL by 10) Zealous Planning SCORE	



Describe what you believe to be your biggest opportunity for positive change in the way your company plans. How do you think your company could improve its planning process?



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Optimized Team Questions to Consider	Score (0 to 10)
In our Strategic Plan, we have specifically identified the areas of growth where we expect we'll need to add to our team over the next rolling 12 months.	
We have a written job description, including required skills and experience, to help us identify and recruit the right people for these positions.	
Once we've compiled our "shortlist" of candidates for a position, we use a third-party objective assessment tool to gauge suitability before we interview the candidates in person.	
In the past 12 months every hire we've made has met our highest expectations on the job.	
In the past 12 months every promotion we've made has turned out the way we expected – no surprises, no regrets.	
We have a standardized compensation plan for our company, and we stick to it.	
We keep at least 3 candidates "waiting in the wings" for all critical positions. They would all jump at a chance to work with us.	
We've never really experienced an issue with finding qualified candidates for our company – even in the sales department.	
We are skilled at interviewing, we interview as a team effort, and the roles of the team interviewers are identified long before we all walk into the room.	
We regularly conduct team building exercises and determine team composition based on pairing strengths / weaknesses to allow for a more balanced group.	
Optimized Team TOTAL	
(divide TOTAL by 10) Optimized Team SCORE	



Please tell us how you engage your current employees and/or your closest business colleagues in the hiring process. Do you use a formal or informal process? Do you give them tools to use? Do you offer a bonus or other reward for bringing in a new team member?

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Next Level Training Questions to Consider	Score (0 to 10)
We take advantage of training opportunities. Everyone at our company has access to training.	
All members of our company are excellent communicators - via email, phone and in person. It is indeed a rare occurrence that we have any form of miscommunication inside or outside the company.	
We excel at team selling. We have no selfish, territorial or prima donna members on our sales team.	
Company wide, we practice “constructive confrontation” - everyone is encouraged to share their thoughts and we arrive at consensus and move on - no hard feelings.	
Everyone involved in sales is skilled at asking great questions to identify or define problems and issues. We work with our clients to identify the best solutions, demonstrating clear value to them. We don't sell on price - only on value.	



We have at least one formal business referral process in place, and we consistently receive referral business from our existing client base and our colleagues.	
Company-wide, everyone takes an active role in their own development of skills. They seek out ways to learn more and sharpen existing skills and talents.	
Everyone in our company, not just those involved in sales can explain our sales processes.	
Everyone involved in sales is skilled in the art of negotiation. We don't get pushed into price wars or lowering our prices to get new business or keep existing accounts.	
We use a coaching system within our company. More experienced people (whether from inside or outside our company) mentor and help develop others in our company.	
Next Level Training TOTAL	
(divide TOTAL by 10) Next Level Training SCORE	



Please describe your most successful training to date. Whether a seminar, formal in-house training program – whatever the format, please tell us who participated and why it was a success. If you've not offered formal training opportunities to your team or taken advantage of training opportunities on your own, please explain why.



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Enduring Growth Questions to Consider	Score (0 to 10)
Every member of our company fully understands what is expected of them to help the company reach its goals.	
Every member of our company has an up-to-date job description and clearly articulated goals that they helped write.	
Every member of our company works with laser focus - no one gets sidetracked by a new idea or market opportunity.	
If you ask any person in our company, they can tell you with great precision how many hours a week they spend in their core areas, and if they are on target to meet their goals.	
We have a documented, structured process for identifying management candidates, nurturing them and promoting from within the company.	
We use objective, third party tools to help us determine our best candidates to promote to management.	
In the past few years, every internal promotion of a candidate to the management level has worked out flawlessly.	
Our short-term and long-term business building strategies are within 90% of target as of today.	
We carefully measure the effectiveness of our sales, customer service and marketing efforts.	
Our entire client experience is recorded in a CRM database. We use this data to deepen our relationship with our clients, uncover new opportunities, and to track our overall growth as a company.	
Enduring Growth TOTAL	
(divide TOTAL by 10) Enduring Growth SCORE	



If you knew you couldn't possibly fail at implementing change (and the change would be met with 100% willing compliance inside your company), what is the first thing you would change about your business systems currently in place?

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Focus Questions to Consider	Score (0 to 10)
Everyone in our company effectively manages their time, effort and the company's resources.	
We stick to our plan and don't get distracted by "opportunities" not in our plan.	
In our company, we see things through to completion. What we start, we finish.	
We're passionate about what we do. There's nothing we wouldn't do to give outstanding service to our clients.	
Each person in our company respects the other members of our company.	
Personal integrity is highly regarded in our company.	
A positive, "can do" attitude permeates our company. Our clients know this and they share that with others.	



On a regular basis, everyone in our company pulls in the same direction. We don't have to waste effort to keep everyone on the same track.	
Everyone in our company consistently has fun doing their job.	
We are the absolute best at what we do. There is little to no room for increased performance, sales or profits in our company.	
Focus TOTAL	
(divide TOTAL by 10) Focus SCORE	

Green & Sustainable Questions to Consider	Score (0 to 10)
We've effectively cut through the "green" noise and have come up with a real plan and a real sense of direction.	
Our green/sustainable plans fully mesh with our organization-wide strategic plan for short and long-term success.	
We have company-wide buy-in for our green/sustainable plan. Everyone's on board, they understand their part and how to do it.	
Our sales team is well trained, prepared and genuinely comfortable engaging our clients and prospects in green/sustainable conversations.	
Our green/sustainable programs are critical to our efforts to ensure our clients see us as a sustainable partner - not just as another vendor.	
We're a green link in our clients' supply chains, and work to help them achieve their own green/sustainable goals.	
We regularly measure our progress toward our green/sustainable goals, especially our success in reducing, reusing and recycling.	



All our clients are comfortable with our green/sustainable efforts and our plans for the future.	
We're ready for the requirements of the Walmart "sustainability Index" today. Our current efforts are enough to meet the new measurement and reporting demands, should we face them.	
We've communicated our green/sustainable plan to our entire client base, and we regularly share with them (and our community) our measured progress to date.	
Green TOTAL	
(divide TOTAL by 10) Green SCORE	



If you could get every person in your company to focus like a laser beam on just one thing for a day, what would it be? Why would you choose that one thing, and what do you think would be the result?

If you're like most folks, you found some of the questions made you really think – not only of how to answer, but also of possibilities for improvement. And, it's likely clearer how your strengths and weaknesses will influence your growth.

Look back at your strongest and weakest places (based on your scores) and visit www.ourgreenvalue.com to see how many resources are available to help you grow in these areas. Membership might be a great option for you.