

# RISE BUSINESS CHECKLIST

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***Driving Your  Business Growth***

## **INTRODUCTION**

Firstly welcome to Rise Advisory, we can introduce you to the next level of business– the level where ownership, profit, and abundance are found. We look forward to working with you, this will prove to be an exciting and powerful journey for your company and with the new skills you're about to learn you'll see positive results in your personal life as well as in your business.

This Business Checklist is designed to show you areas in your business that may need additional attention to help you achieve your goals so be prepared to Rise above your present ability.

Be prepared to keep an open mind and to make decisions.

Be prepared to do things you may never have done before...and most of all,

Be prepared to have FUN!!

Inside this report you will find ...

1. Your answers as entered in the questions profile (Yes or No)
2. Advisors comments

# Your Business Checklist

Business: \_\_\_\_\_ Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Category	Y	N
<b>Marketing and Sales</b>		
<b>Marketing</b>		
Database		
Target market/s identified		
Measurement system		
Alliances		
Social Media		
Magazine		
Shows/ Expos		
Website/ AdWords /SEO etc.		
Brochures		
Other		
<b>Sales</b>		
Sales targets		
Sales Key Performance Indicators and measurement		
Regular sales meetings		
Top 20 clients known		
Ideal client identified		
Top 20 prospects listed		
Measure Ave \$ sale		
Commission structure		
Team Incentives		
Vehicle/ phone supplied/terms		
Allowances		
Scripts		
Training program		
Loyalty program		
Standard Pricing schedule		
Discount Policy		
Quote system		
Follow up cycle		
Unique selling Position/Proposition		
Guarantee		
<b>Operations</b>		
<b>Production</b>		



Franchise fees		
Royalty fees		
Admin Wages		
Production wages		
Owner drawings		
Sales commissions		
Power		
Phone		
Internet/webhosting		
Vehicle		
Insurance		
Accounting		
Marketing commitments		
Monthly Automatic payments/HP		
<b>Finance</b>		
Daily / Weekly / Monthly break even		
Terms of trade		
Supplier payment terms		
Current debtors		
Overdue debtors		
Current creditors		
Overdue creditors		
Accounting procedures and monthly financial reporting		
Reducing interest rates and liabilities		
Availability of further funds or borrowing		
<b>Structure and Risk</b>		
<b>Structure</b>		
Trusts		
Shareholders agreements		
Directors agreements		
Exit strategies		
Wills		
<b>Risk management</b>		
Employee Liability		
Public liability		
Professional		
Theft		
Medical/ Critical		
Business loss		
Key person insurance		
Life insurance		
<b>Organisation and Leadership</b>		
<b>Organisation</b>		
Business Vision		
Rules of the Game		

Organisational chart
Process / workflow charts
Recruitment system and updated contracts
Position descriptions/ Reviews and Careers pathways
Relevant legislation eg OSH/H&S/Accreditations
<b>Leadership</b>
Personal development
Do you Prioritise (Urgent/Important)
Do you Delegate
Do you work ON your Business
Do you have a clear Direction for your business
Do you have leaders in your business
<b>Personal – Are you happy with?</b>
The income you take out of the business
The profit you take out of the business
The number of hours and days you work in the business
The sort of work you do in the business


## Advisors Comments: