

Help us understand more about the **\$COPE** of your business.

- \$** Finance
- C** Customers
- O** Operations
- P** People
- E** End in Mind

Date

Name

Company

Position

Contact Phone:

This questionnaire will provide us with insights about the issues and opportunities you are facing currently in your business. Thank you in advance for taking the time to complete this process.



Boudreaux Henderson
& COMPANY, LLP

Please contact Fran Henderson if you have any questions.
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Let's begin with the **End in Mind . . .**

Please check on statements that you feel are true about your company

- We have a written strategic plan.
- We have a clear vision for the future of the company.
- We have shared the vision of the company with all employees.
- If asked, the majority of employees could state the vision of the company.
- We have a written succession plan.

Comments

\$ Finance

- We have a timely and reliable financial reporting system.
- We manage our cash flow well.
- We are getting a good return on our assets.
- We routinely review our purchasing practices and shop vendors.
- We make critical decisions with information outside the financial statements.

Comments:

Customers

- We are able to track the effectiveness of our marketing efforts.
- We can quantify our cost of acquiring a customer.
- We have a system for handling customer complaints.
- We have system for tracking customer satisfaction.
- We have identified our ideal customer profile.
- Everyone on our team can articulate our unique selling proposition.

Comments:

Our customers buy from us because

Operations

- We have documented our critical processes and procedures.
- We can break down our actual costs per product and/or service.
- We have a system for stimulating and implementing employee innovations. Comments:
- We have very little waste, scrap or rework.
- We have established quality control standards.
- We routinely measure our utilization and productivity.

People

- We are good at attracting and retaining talent to our company.
- Our training programs are effective.
- We pay our people at market rate. Comments:
- We have linked compensation to performance.
- Our employees have a good understanding of the financial aspects of our company.
- Our employees work well as a team.

If you could change one thing in the company immediately, what would it be?

What keeps you up at night?

What is your greatest opportunity for growth and improvement in the next five years?

What is the greatest challenge your company will face in the next five years?

Click on the arrows and select the answer that fits you best.

How would you compare your company to your competitors?

How would others in your company respond to this questionnaire?