



Administration

- < Office file procedures established and documented _____
- < Company operations manual in place _____
- < Established written office paper flow procedures _____
- < Project management software in place – PSA, Assured Complete, DASH, etc. _____

Sub total



Financial

- < Required monthly reporting in place and understood _____
- < Profit and loss statement _____
- < Balance sheet _____
- < Job costing reports for completed projects _____
- < Aged accounts receivable _____
- < Required weekly or as needed reports: _____
- < WIP reports _____
- < Detailed and summary job costing reports _____
- < Collections status summary report _____
- < Benchmarks established for minimal and ideal performance levels for all management staff _____
- < Aware of turn on receivable and under 60 days _____
- < Weekly or monthly cash report _____
- < Know breakeven revenue for profitability _____

Sub total



Marketing

- < Marketing plan written _____
- < Marketing goals established _____
- < Marketing budget written and expenses planned _____
- < Marketing opportunities outlined and followed by non-marketing department staff _____
- < CRM in place and utilized _____
- < Marketing activities undertaken by all management staff _____
- < Company has consistent brand – logo, printed material, website, advertising, etc. _____
- < Hold routine marketing meetings – every month or more often _____
- < Marketing includes diverse group of more than agents and adjusters _____

Sub total



Personnel

- < Written Organization chart _____
- < Written Job descriptions for each position _____
- < Annual performance evaluations _____
- < Routine coaching performance meetings and evaluation _____



- < Monthly safety training or meetings
- < Safety – OSHA OR Worksafe rules written and followed
- < Safety committee
- < Monthly safety meetings
- < Employee personnel file system
- < Written and implemented bonus and incentive plan for all staff
- < Orientation program in place for new staff

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Sub total

Production

- < All construction jobs estimated before starting
- < Job budget established before starting
- < Critical path production schedule in place for jobs over 5 days
- < Signed material selection sheets for all customer selections
- < Stage customer satisfaction survey
- < Final completion notice of satisfaction for all jobs
- < Utilize Purchase orders to track and manage purchases
- < Measure and manage shop time (non-reimbursed labor)
- < Internal technical training takes place at least once per month

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Sub total

Scores

70 Questions total - max 140 points
 0-40 You need help now and should not consider growing your company until you work on infrastructure
 40-80 You have major weaknesses and need to build your foundation prior to growing
 80-120 You have a strong company but will benefit from strong direction and planning in your company
 120-140 Congratulations you have a great company - keep up the good work

TOTAL

If you would like to learn more about building a sustainable foundation and improving your company contact our office for a free 30 minute assessment of our business.

Enter High priority item summary here:

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____
- 8 _____
- 9 _____
- 10 _____