



Performance Keys: High performance checklist

How to score:

- 0-Not even on our radar screen
- 1-Discussed but not past the thought stage
- 2-Discussed on more than one occasion but not progressed
- 3-Some attempts have been made to move forward
- 4-Solid progress has been made although still somewhat adhoc
- 5-Fully in place, documented, process driven & and working well.

	Pathways to excellence	Your score (0 to 5)
1	We are clear about the vision and purpose for our business including what success looks like for all our key stakeholders.	
2	We have a documented strategic plan that details the key strategies & tactics required to be successful including swot, trends, risks, competition, and legislative etc.	
3	Our operational or business plan goals including financial budget for the next 12 months is documented and being actively implemented	
4	Processes are in place to regularly monitor and review overall business performance including strategies to correct any areas of non-performance. This includes relative management reports, scorecards & dashboards.	
5	The company closely analyses gross profit margins by product, service and customer to ensure they are being maintained	

6	Control over working capital management including cash flow are timely and effective	
7	The company has identified strategies that will provide it with the greatest opportunity to attract, engage and retain highly productive and loyal staff	
8	All managers and team members have clarity over their roles including what is expected in terms of KPI's including how and when that performance is measured	
9	All staff have been trained in the art of self-managing their own performance at a holistic level	
10	Time is set aside at regular intervals to <u>formally appraise</u> the performance of staff in a purposeful and inclusive manner	
11	Purposeful meetings with specified protocols take place within the business and are a key communication and accountability tool.	
12	External communications with our customers, key suppliers and other partners is excellent and driven by protocols and not simply relying on people to do the right thing	
13	The company has identified the target markets for its products and services and has a marketing plan (traditional & digital) in place to attract new business.	
14	Sales processes and the skills of our sales people ensure that our new sales opportunities are converted into sales at the required conversion rates	

15	Strategies exist to build and sustain the company's profile, branding and reputation in the market place.	
16	Strategies exist to ensure the current customers are well looked after, are feeling the love and are advocates for who we are and what we stand for	
17	Documented policies, standards & procedures exist for each key business activity that drives business outcomes	
18	Company notes, manuals, stories and procedures etc. capture the knowledge and wisdom to be retained within the business	
19	A high focus is focused on improving productivity including planning and time management techniques. Training where required is provided	
20	The company embraces the latest in technology relevant to the industry and the opportunities to build a competitive advantage including technology's role in staff retention	
Total Score out of 100		

How did you go? Comment

75 -100	Outstanding result, you really must have worked hard to be in this position. The only suggestion we have is to engrain the habits, disciplines and processes that were key to your success in the first place as the pendulum can easily swing the other way in a heartbeat.
50-74	You are either on the way working to a plan or may have slipped back from where you once were. Either way its important to know and understand what you need to do to close those gaps and move to a consistent score of 75-80 which is where all good businesses need to be.
<50	Firstly, thanks for being so honest but that is important in terms of being able to objectively move on. I'm unsure if you simply marked yourself too hard or genuinely have a number of improvement opportunities to work on. Either way, I think it be worthwhile having a chat.

Should you like to discuss your results we suggest 3 options:

- 1) Directly email to steve@performancekeys.com.au
- 2) Phone Steve on 0408 754 976
- 3) Let's set up a Skype or Zoom video conference call.