**Money Coach Business Strategy Assessment**

Rate yourself on these areas, with 1 meaning you might need to work on this and 10 meaning you are a ROCK STAR!

**Networking and Time Ownership**

When you go to a networking event, you have a clear goal as to what will make that meeting a success. Example- make 3 appointments, speak to a particular colleague, make inroads toward a partnership with a colleague there.

1 4 7 10

You periodically examine your networking events and perform some type of a Return on Investment (ROI) analysis to determine your continued attendance at those events.

1 4 7 10

You have a 30 second or 60 second introduction speech lined out ahead of time (you don’t just “wing it”) and your introduction speech is clear, concise, and ALWAYS has a referral description.

1 4 7 10

You plan your week ahead of time, and spend most of your time with your Income Producing Activities (IPAs), which you document and track.

1 4 7 10

You do the things that you are good at, you do most, or all, of the selling of your products, and delegate other activities which do not fit your talents to someone else who is better suited to those tasks

1 4 7 10 Total Score \_\_\_\_

**Website**

You have a website that clearly states what you do. It has an “Opt In” area so potential clients can sign on to your mailing list. You have a “freebie” to entice them to do so, and it is adding clients every month.

1 4 7 10

Your website allows your potential customers to buy directly from you on that site, and allows them to use a credit card without your intervention.

1 4 7 10

You have pictures and/or videos on EVERY page of your web site.

1 4 7 10

You have testimonials, with pictures, throughout your website, not just on a testimonial page.

1 4 7 10

Your website is functional, not out of date, and easy to understand. Potential clients can find their way around it easily, and move to different pages as needed. You can update your website easily so it stays in date with no major “hassles”.

1 4 7 10 Total Score \_\_\_\_

**Finances**

You know, every month, what your actual expenses were, where they were spent, what your changes in expenses are, and your profitability for the month.

1 4 7 10

You can easily see and understand, in a graphical format, your expenses for the month, your profit for the month, and your gross income for the month.

1 4 7 10

You can easily see, in a graphical format, up to the current month, what your profit is for the year.

1 4 7 10

Your combined list of connections (Linkedin, twitter, facebook, newsletter list, ect) is continually growing.

1 4 7 10 Total Score \_\_\_\_

**Selling**

You have a defined, documented sales funnel, with products from “freebies” to a high end product, that you revise, revisit, and refine twice a year.

1 4 7 10

You have several product lines, or several sources of income, not just one income stream.

1 4 7 10

You have a pricing structure that is documented and redefined and revised, twice a year.

1 4 7 10

You have a written business map or plan that is redefined and revised twice a year.

1 4 7 10

You have a defined selling system which enables you to work clients through a defined path that will increase the possibility of them making a purchasing decision from you (assuming you have a product fit).

1 4 7 10

You have a confidant, a counselor, or a “board of directors”, to whom you can go, discuss, and get unemotional advice for your business.

1 4 7 10 Total Score \_\_\_\_

Overall Score\_\_\_\_

To Schedule a Business Review, email [mike@moneycoachcorner.com](mailto:mike@moneycoachcorner.com)

Or call 512-632-1565 [www.mkoneal.com](http://www.mkoneal.com)