

CEO Eval Tool





THIS IS YOUR YEAR

As a solopreneur/entrepreneur, we wear many different hats in our business.

We tend to spend a lot of time working in our business instead of working on our business and therefore we don't get to grow as much as we would like to.

As business owners wearing numerous hats in our business we tend to become overwhelmed with all the details and lose vision of our business and passion. We become overwhelmed and overworked and find ourselves lacking energy and feeling uninspired.

This CEO evaluation tool has been designed for you to really take apart your business and look at the whole picture, your business and also the lifestyle of you, the business owner.

Because, if the business owner isn't healthy and in optimal health than a business can't be live up to its full potential either.

The evaluation tool that follows is a way of assessing different aspects of your business.



Social Media Presence

Social Media is a nonnegotiable for a successful business nowadays. With billions of daily users on platforms like Instagram or Facebook, there has never been a better way to get the word out about your business.

(+1) I have an Instagram account

(+1) I have Facebook page

(+1) I have a twitter account

(+1) I post daily

(+2) I have a SM content calendar

(+2) I have a SM strategist

(+2) I run FB ads or I have someone that runs ads for me

Score for section 1: _____

1-3 - Your social media game can use improvement. It is best to have a social media plan and be constant with your posts and content.

4-6 - Not bad! Seems as if you have your social media game working for you but could use some improvements.

7-10 - You sound like a social media superstar!



Marketing Plan

When you fail to plan you plan to fail. The purpose of a marketing plan is to clearly show what steps or actions will be taken to achieve the plan goals and how to market and advertise your business to bring in new customers.

(+2) I have a written marketing plan

(+2) I have an allocated budget to spend on marketing and advertising that I stick to monthly

(+2) I have creative ideas on how to market my business that doesn't cost money

(+2) I know who my target audience is and how to reach them

(+2) I have specific outcomes (goals/revenue) for my marketing outreach

Score for section 2: _____

0-4 - Maybe it's time to make a marketing plan for your business if you don't have one

5-7 - Your marketing strategy may need an overhaul or a few weeks and updates to what you already have.

8-10 - Your marketing plan sounds like it's stellar and bringing you in lots of new clients!



System and Strategies

System and strategies are important in business because they help to outline proven processes to success that can be reproduced.

(+1) I have written systems in place on how I do business

(+1) I have a system in place on how I onboard clients

(+1) I have a system in place on how I collect payments

(+1) Daily appointment automation- have an online calendar that automatically reminds me and my clients of our appointments

(+2) I have a system on how to build content and share it with my audience

(+2) I have an automated lead generation and follow-up series

(+2) I have automated passive products to sell, i.e. sales funnel, trip wire set up

Score for section 3: _____

1-4 - Setting up systems in your business is super important to get your goals accomplished.

5-8 - You've got a great start on systems and strategies but may need to update and add in some others.

9-10 - Girl, you got those systems under control, great job!



Passion & Vision

Passion and vision is important for a business because there are will always be ups and down in any business. Without passion and vision for your business it can feel like you may want to quit when times get tough. Passion is one of the most effective motivators when it comes to launching a business is the reason why behind the reasons you are doing what you are doing.

(+2) I get up every day excited to work on my business

(+1) I love what I do

(-4) I am burnt out from my business (negative points)

(+1) I have a 90 plan for my business

(+1) I have a vision for where I want my business to be in 1 year

(+1) I have a vision for where I want my business to be in 5 years

(+2) My Visions match my core values

(+2) My daily actions match my vision and core values

Score for section 4: _____

1-4 - If you are feeling burnt out or lacking passion in your business it's either time for a break or a new plan.

5-8 - You may have passion for your business but maybe you need to refine your vision

9-10 - Looks like your vision and passion are aligned for your business!



Finances / Wealth

Having control and knowing exactly what money comes in and out of your business is important because If your business is not making money then you really don't have a business, you have a hobby.

(+2) My business is making money

(+1) I have a clear knowledge of my expenses and income and I track them

(+1) I know what items are considered expenses and any write-offs I can use with my business

(+1) I have an abundance mindset

(+1) I have reasonable monthly financial goals for my business

(+1) I know where I am going to allocate the money I bring into support and grow my business

(+1) I work on my financial mindset

(+1) I charge what I am worth

(+1) I have an accountant I work with and trust

Score for section 5: _____

1-4 - It's time to take control of your finances and your wealth mindset

5-8 - Looks like you have some things under control but need some improvement in other areas of your finances

9-10 - Your business is making money and it looks like you have your finances under control.



Networking

Networking with others is an important way to grow your business. The more people that know about your business and can give you referrals the more customers your business will get.

(+2) I network with people online

(+2) I attend networking events in my local area

(+2) I have a succinct elevator pitch

(+2) I have a group of people I can mastermind about my business with

(+2) I have a strong network of people I can crowdsource with when I need things

(+2) I contribute to others blogs/podcasts to increase my exposure

Score for section 6: _____

1-4 - You may need to work on getting more people to know who you are and what your business does.

5-8 - Looks like you have some additional work to do to get more exposure for your business

9-10 - You have this networking stuff down, every knows who you are and what you do!



Success Mindset

Cultivating a success mindset and working on your personal development is important to your grow your business.

(+1) I work on my personal development

(+1) I spend money on programs or services that will help me to increase my knowledge

(+1) I have a business coach

(+1) I read/listen to material that helps me to help with my self-development

(+1) I believe in myself and my business

(+1) I have daily rituals that help to improve my mindset

(+1) I engage in positive self-talk

(+1) I surround myself with positive, uplifting people

(+1) I practice gratitude

(+1) I spend some time in silence daily

Score for section 7: _____

1-4 - It may be time to focus on taking some steps to increase your success mindset

5-8 - You have a good foundation and have cultivated a success mindset but there is always room for improvement

9-10 - Congrats, you are really working on your success mindset!



Health / Self-Care

You may not realize it but being in good health and taking care of yourself is so important to your business's success. When you don't feel well and you aren't in optimal health then your business will suffer.

- (+1) I am in good health
- (+1) I have a daily exercise routine
- (+1) I eat a healthy diet that helps to keep me energized and focused throughout the day
- (+1) I have energy all day
- (+1) I take breaks from my work; power of full engagement
- (+1) I get a good nights sleep and I wake up rested and ready to build my business
- (+1) I take time away from my business to spend time with friends and family
- (+1) I take time for myself
- (+1) I engage in activities that help to build my creativity
- (+1) I have a health care practitioner I can talk to on a regular basis and that I trust

Score for section 8: _____

1-4 - It looks like you need to take some more time to focus on yourself and your health

5-8 - You have some great healthy habits in place but you may be able to add some more self-care habits into your daily routine

9-10 - Looks like you have this self-care thing under control!



Delegating

Are you spending more time working in your business than on your business? It is important to understand where your strengths in your business and delegate or outsource all the tasks that someone else can do better or cheaper.

(+1) I delegate work to people that work for/with me

(-4) I do everything in my business myself (negative points)

(+2) I know my hourly rate and outsource anything that someone can do for less

(+1) I have someone who manages my website

(+2) I have someone that manages my social media handles

(+2) I have a business coach

(+2) I have an accountant and lawyer that I can trust and ask questions to when I need

(+2) I have a personal/virtual assistant

Score for section 9: _____

1-4 - You may need to outsource some of your workloads to people that can do the same work for less.

5-8 - You are good at delegating something but you may need to look at other places to outsource

9-10 - Good for you, you know how to delegate work and don't feel like you need to do everything in your business yourself.

THE BIGGEST STRENGTH IN MY BUSINESSES IS:

THE BIGGEST WEAKNESS IN MY BUSINESS IS:

NOTES:

Now that you have looked at many different aspects of your business and seen where your strength and weaknesses lie in your business and you are ready to really dive into your business and put a plan together to help it thrive then let's schedule a FREE 20-minute Business Strategy Call. On this call, we will review your results from your CEO evaluation tool and hone in the top 2 things that most need improvement in your business. You will walk away from this session with actionable items to make changes to your business that will help to make you more money in less time.

Who am I?

You could say I was born to be an entrepreneur, my parents started and built a successful technology business that has been in business over 30+ years.

When I was younger I was always thinking of ways I can start my own business, I remember charging family to watch my magic show when I was 3 years old!

I went on to build a successful personal training business when I was just a teenager and then eventually went on to manage hundreds of personal trainers and group fitness instructors in a large multi unit gym on the east coast for almost a decade.

Eventually, I left my corporate job to return back to school to get my graduate degree in Nutrition while working with my father to help grow his technology business.

Over the years I have worked with many people to help them build their own small business that I eventually became a business coach that helps women to build a business or take their current business to the next level.

My purpose is to help female entrepreneurs work smarter and have more time for living by creating critical systems that help them make more money without the hustle.

