



Soul-Driven Business Assessment

There are 100 critical success factors to building and maintaining a full, rewarding and profitable soul-driven business. For the purposes of this assessment, the reference to “Professional” assumes the soul-driven business owner. There 10 distinct areas to be assessed as follows.

1. Strong Client Relationship
2. Service, Value and Excellence
3. A Cost-Free Practice
4. Referral Generation
5. High Productivity
6. Practice Management
7. Empowered Clients
8. Personal Balance
9. Accounting and Profitability
10. What Else Do You Need?

Answer each question truthfully. If the statement does not apply or will/can not be true for you, mark it as yes / true. Total the number of yes / true statements for each section. Then add the totals from each section for a total score. Please remember that low scores indicate your growth opportunities. Good luck!

Strong Client Relationship

Clients hire a Professional because of their reputation or availability; they stay as a Client because of the service they receive and because of the relationship which both parties create. Here's how to do more of this.

- I am ahead of my clients: I know what is next for them and they know I know this.
- I tell my clients what I want for them.
- There is complete trust and clear communication between me and my clients.
- I do extra things for my clients regularly.
- I am proud of my clients and enjoy their company.
- I do not put up with much from my clients.
- My clients consistently bring out my best work.
- I work only with the clients who are right for me and who are ready for my services.
- I show the good client how to be a great client.
- My clients keep me moving forward and developing my skills, self, range of tools.

_____ Number of YES blanks checked (10 maximum)

** (Special thanks to Thomas Leonard for his inspiration, guidance and tools.)



Service, Value and Excellence

The Professional must continuously add value to the client and to the relationship in order to stay current. With the growing number of people entering your field, the Professional must innovate, be fully client-oriented and provide value continuously. Here are benchmarks for providing value.

- I use an objective system to measure my clients' satisfaction with my services.
- Quarterly key client check-ins are conducted and changes are made accordingly.
- I assess my own "moments of truth" and make enhancements as a result.
- I make at least one change or upgrade each time I lose or make a mistake with a client.
- Service standards are very high, in writing, and clearly visible daily.
- I have and operate from a mission statement which I can state from memory.
- Value is continuously being added to products and services, whether the client asks or not.
- Service and requests are fulfilled faster than the clients expect.
- I have a strong reputation for being the best in delivering service in my field.
- I know what my clients want and need even before they do.

Number of YES blanks checked (10 maximum)

A Cost-Free Business

Every business has high hidden costs – such as emotional costs - which limit the quality of service provided and keep the business limited. In fact, there is a direct inverse / proportionate relationship between the size of the business and the number of costs that are being experienced. Use this list to identify and eliminate all of these costs.

- My clients do not violate my personal and professional boundaries.
- I do not gossip about my clients, ever.
- My clients almost always do what they promise.
- My clients give me credit for the part I play in their success.
- My clients consistently keep their appointments.
- I don't work outside of my best daily schedule.
- My clients do not complain or blame; rather, they either create, request or solve problems and use me as a resource to accomplish this.
- I do not count on willpower to do the things I know I should do in my practice. I have a supportive coach or partner to help those items to not cost me.
- I have not over-promised results or hinted that I could accomplish more than I absolutely know I really can easily. In other words, I have under-promised.
- None of my clients dig, demean, diminish, belittle or fight me.

Number of YES blanks checked (10 maximum)



Referral Generation

The best clients often come from referrals. To generate a flow of these referrals requires a strategy and a plan. Here are 10 elements of most successful Referral Plans.

- My clients know that I want more business.
- I have strong relationships with at least 5-10 "Centers of Influence" (COI) who are currently sending me referrals.
- All of my clients know all of what I offer.
- All of my clients know the types of clients I am looking for.
- I call or thank the source of every single referral.
- I give my clients or COIs an incentive for sending me new business.
- I have some way for prospective clients to get to know me, "taste test" my services or get started on a smaller scale.
- I send out a monthly or quarterly newsletter, ezine or announcement.
- I have written marketing material that I or my clients can give to others.
- My clients know what happens when someone they refer calls or comes in so they feel more confident about sending referrals.

Number of YES blanks checked (10 maximum)

High Productivity

Billable time is the financial engine of any business, which means that anything that gets in the way of billable time is very, very expensive. Start increasing productivity by doing everything on the list below so you can bill more!

- All paperwork is touched only once.
- Operations are fully computerized.
- Very, very few problems occur anywhere. If they do, they are handled immediately and the source is eliminated.
- A single individual has responsibility for the day-to-day operating decisions.
- I and my staff do very complete work; nothing is thrown together or substandard.
- There is no part of my client procedures or process that I am doing that I shouldn't be doing for my physical or emotional well-being. I delegate effectively.
- I do no paperwork/procedures that are not billable.
- Every meeting accomplishes something specific.
- Staff communicates everything that is getting in the way of their being productive and knows how to make request vs. complaints.
- Staff has the equipment and training they need to double their productivity.

Number of YES blanks checked (10 maximum)



Business Management

The Professional must operate in a supportive, cost-free environment which means that every staff person is an integral part of a winning team. Here's what to do.

- Staff accountabilities are written and clear.
- I conduct quarterly employee reviews.
- Staff lives to support me and go out of their way to make my job easier.
- I have the right accountant, banker, attorney, coach and other advisers who add to my profitability.
- Each employee is in the job which uses his/her strengths; there is no suffering or mismatches.
- Consequences are imposed for non-performance.
- Every employee is fully competent and skilled and is qualified by experience, education, loyalty, motivation and competence (no weak links or pull-downs).
- I have a business plan / map which I refer to monthly.
- Everything has a deadline or promised completion date, managed by the employee and manager.
- Staff *wants* to come to work; they are well cared for at work.

Number of YES blanks checked (10 maximum)

Empowered Clients

Clients need empowerment to be their best - for themselves and to be with you powerfully. You can show them how to be empowered by raising your standards, establishing extensive boundaries and by showing them how to get the most from your services and the relationship.

- My clients know the benefits they are receiving from the services they are getting.
- My clients add to my reputation; I do not work with clients who will damage it.
- My clients send me referrals for more business.
- My clients will be able to pay increasing fees.
- My clients are responsible for their own needs, business, life and results and use my services appropriately.
- My clients use me as a partner and not just as a technician to fix or handle something.
- My clients have a recurring need for my services.
- My clients always pay their bill on time; money is rarely an issue between us.
- Every client respects my advice, expertise and gives me the room I need to do an extraordinary job.
- My clients look for ways to help themselves to address their challenges proactively.

Number of YES blanks checked (10 maximum)



Personal Balance

The quality of the Professional's work and the success of the business depends heavily on how the Professional maintains his/her well-being in all ways - physically, emotionally, mentally and spiritually.

- I have more time than I need because everything is so well done or delegated.
- I have a right-hand person/ assistant who handles every detail so I have space.
- I have a strong, happy and healthy personal life with lots of physical activity and pleasure so work is work and not my life.
- I am adrenaline-free.
- I put aside plenty of funds with which to become financially independent.
- The business is in good enough shape to sell; I have documented all of what I do / know.
- I have a very strong personal foundation.
- I enjoy creating breakthrough results for clients.
- I consistently do ten habits for daily well-being.
- I am happy and proud of myself as a human and as a professional.

Number of YES blanks checked (10 maximum)

Accounting and Profitability

Running a successful business means having solid operations. Accounting, taxes and profitability are necessary for the professional to be his/her best, have a future and enjoy the present.

- Bank reconciliations are complete and up-to-date.
- All income, sales and property taxes are filed, paid and current.
- All bills are routinely paid on time.
- Accounts payable ledger is current and includes all bills and purchase orders.
- Accounting is well-run and/or I use a superb bookkeeping service / CPA.
- I have a budget which I compare with my monthly financial statements which are done by the 5 -15th of month.
- All accounts receivable are being collected per standards.
- Business profits are very, very high at a very conservative level of revenue.
- No single customer accounts for more than 25% of total sales or receivables.
- Services/products are packaged so that they produce a stream of income, not just a one-time sale.

Number of YES blanks checked (10 maximum)

