



Annual Survey for B-S-A Program

Owner / Manager _____ Date _____

- I want more _____ in my life.
- My three biggest business concerns are _____,
_____, _____
- I waste too much time doing _____
- My goals for the firm for 2008 are

- I want to achieve these three things over the next 12 months:

_____, _____
- My business strengths are: _____, _____,
_____, _____, and _____.
- I want to get better at _____,
_____ & _____.
- I need the most help with : _____ & _____

Leadership Tools

I know what I want the firm to look like in 3-5 years and I communicate this vision to the staff. Yes ___ No ___

I have established goals and strategies to achieve the vision. Progress is measured. Yes ___ No ___

My core values are practiced by managers and communicated to the staff. Yes ___ No ___

I have a business plan for the firm and check it at least once a month. Yes ___ No ___

I have made hiring and retaining the right employees a top priority. Yes ___ No ___

I've established priorities and budgets for administrative, financial and client development issues. Yes ___ No ___

I have a system for monitoring and forecasting cash flow. Yes ___ No ___

I have a system for monitoring our labor backlog by month. Yes ___ No ___

I monitor the sales pipeline to make sure it is full of qualified prospects and opportunities. Yes ___ No ___

I understand the value of keeping and growing the clients we already have. Yes ___ No ___

I have a process to identify and manage the firm's risks. Yes ___ No ___

I monitor the competitive environment and keep abreast of industry trends. Yes ___ No ___

I know what talents and personality characteristics are important in future leaders of the firm. Yes ___ No ___

Other Questions and Issues