BUSINESS ASSESSMENT
Documenting What You Do

Trainual

To scale a business, you need to do things **consistently**. You need new people to get up to speed fast, and long-time employees to leverage their experience to refine and update your best practices. As you set out to build the playbook for your business, you'll extract your processes and policies from your people and standardize them in one place for everyone to see.

How far have you traveled down this path?

Whether your intentions are to open new locations, grow your team, make a change to ownership or simply to build a more systematized foundation for your business, documenting what you do is the only way to delegate what you do. You're one step closer.

Are you wearing every hat in your business?

Let's find out.

On the following pages, you will rank each area in your organization on a scale of **0 - 12 points**.

For context, we have included 3 short paragraphs for each area so that you can identify **where you are today**.

You should fall into only **ONE** of the three buckets on each page, and then within that area, select a score based on how advanced you feel your business is.

At the bottom of each page, **record** your score (0 - 12).

On the final page, total your points from each page to receive your total score and **outcome** for this assessment.

Doing (1, 2, 3, 4) - This area is just getting started

Your company doesn't have much history, and everyone on your team is only aware of how and why the company was started through casual conversations. As a team, you haven't yet identified core values, or if you have your team would struggle to repeat them. The vision and mission of the company are unclear, and little has been documented about where you are heading and why. When a new hire starts, their orientation to your company history happens verbally, perhaps over lunch, without much detail. And, as the years go on, you haven't bothered to capture milestones or media to share with future hires.

Documenting (5, 6, 7, 8) - This area is becoming systematic

Your orientation is taking shape. New employees understand what it means to be a part of the company, and some of your vision or values have been captured and documented in a way that they can be shared consistently. The stories about your early days and your team are still taught over time at the company holiday parties and picnics, but the foundation is there. One or two people in the company have put some time into intentionally capturing your culture and presenting it to new teammates, but perhaps the story lacks color or creativity.

Delegating (9, 10, 11, 12) - This area is solid and scalable

You have clearly defined the company mission, vision and core values, and everyone in the company could explain them to a stranger. The team exemplifies your culture, and your documentation and training reflects a true picture of what it's like to work within your walls. New hires are introduced to the company history early, and you supplement the story with photos and videos to make it more vivid. Regardless of where they work or who is training them, a new employee gets the same experience of understanding the evolution of the business and the path down which it is traveling today.

WHAT IS YOUR SCORE?

_____ /12

The policies that govern and guide your team.

Doing (1, 2, 3, 4) - This area is just getting started

You haven't yet taken the time to develop policies or an employee handbook. If you do have a handbook, it was downloaded for free online and many of the policies seem irrelevant or outdated for your organization. Creating policies is reactive in nature, and as you experience issues with contractors or employees you layer on red tape to address specific situations that haven't arisen before. There is grey area for your team on what is and isn't allowed, and accepting certain behaviors had led to things feeling "looser" than you would like.

Documenting (5, 6, 7, 8) - This area is becoming systematic

You've hired some HR support externally or in house to create policies that are relevant for your organization, and every employee is exposed to them at some point in their employment. As rules change, however, rolling out updates is difficult and inconsistent, so there is some confusion about whether everyone is operating under the same set of standards. Perhaps your policies were standardized at one time, but they could use an update, and tackling this project just isn't a top priority.

Delegating (9, 10, 11, 12) - This area is solid and scalable

The company policies are well documented and have stood the test of time as various situations arise. You are proactive in creating policies and anticipating issues, and regularly seek the counsel of in house or external HR support. Employees are consistently trained on the rules of your organization, and you record the time and date of their training or sign-off to ensure that you are compliant and well organized, should you have a problem in the future.

WHAT IS YOUR SCORE?
_____ /12

What you do or what you sell to the market.

Doing (1, 2, 3, 4) - This area is just getting started

Right now, you're still seeing what sticks. You've tested several products or services, and you often customize solutions or your pricing based on the customer and what you think they need. Your employees struggle to explain exactly what their company does, or the company does so many things that their explanation feels generic and wouldn't intrigue a friend. Your products and services are commodities and don't have any specific name or hook to make them interesting, and the lack of conformity makes documenting difficult.

Documenting (5, 6, 7, 8) - This area is becoming systematic

You have narrowed your products and services down to a key offering, and your message to the marketplace is clear. Because of this, you've been able to standardize your pricing or create a menu of services. It's easy to quote customers a price, because you have simple packages that are simple to communicate and have been described on price sheets or on your website. Employees generally speak the same language about your products and services, regardless of their role.

Delegating (9, 10, 11, 12) - This area is solid and scalable

The information about your products and services is described in detail and available for everyone, internally and externally. You have examples, case studies, photos, and marketing materials that support your sales team and represent your offering accurately. Everyone can give a consistent elevator pitch about what you do, and it's clear whom to direct a prospect to if they are interested in working with you. You don't accept work that is outside the bounds of your core offering, and there is no ambiguity about your differentiation in the market or unique value proposition.

WHAT IS YOUR SCORE?
_____ /12

How you fulfill your core product or service to your customer.

Doing (1, 2, 3, 4) - This area is just getting started

Fulfilling your product or service happens a little differently each time, depending on who is doing it. Making the sale is 10% of the battle, and getting the work done is where things tend to fall apart. You don't have or follow consistent timelines, and much of the success of a sale depends on how picky your customer is. Results are mixed, and there is a lot of work ahead, but you know that at the center of what you do you are providing value to the customer, if everything goes as planned.

Documenting (5, 6, 7, 8) - This area is becoming systematic

You have started to formalize the process of how you do what you do. You've introduced some technology, like project management tools or a CRM to ensure that the process happens the same way each time, and roles and responsibilities within your process are clear. There may be slight variances in how certain people perform your basic process, but you are working toward developing best practices. The core outline of your process has been outlined and shared with the entire team, and perhaps even your customers.

Delegating (9, 10, 11, 12) - This area is solid and scalable

Your process for fulfilling the product or delivering the service runs like clockwork. You have a virtual assembly line and step-by-step instructions that team members carry out with unwavering discipline. The process has not only been well described, but you have added visual elements or designed collateral to illustrate how things work to all stakeholders. Your employees understand their own role in your process, but are also cross-trained on the basics of what everyone else does in order to appreciate the context of their position. With your instructions in hand, a skilled stranger could fulfill a sale.

WHAT IS YOUR SCORE?
_____ /12

How you communicate with your target customers.

Doing (1, 2, 3, 4) - This area is just getting started

Your new business comes mostly via word of mouth, and you don't yet have repeatable systems for attracting new leads or prospects to your company. Marketing efforts are infrequent and scattered at best, and your content initiatives like blog posts or newsletters have fragmented messaging rather than a unified theme or campaign. In short, you're still trying to figure out what messaging sticks for your target customer, and what channels are most effective for reaching them.

Documenting (5, 6, 7, 8) - This area is becoming systematic

Your marketing has become more intentional. You have defined and documented the channels that work best for reaching your customers, and you've identified the central messages that can be used throughout all of your materials to start a conversation with your prospects and to keep them engaged. You employ marketing automation tools to deliver results more consistently, and you are regularly creating and posting content that is valuable for your audience. Your brand is more than just a logo. Multiple people have contributed to your marketing efforts.

Delegating (9, 10, 11, 12) - This area is solid and scalable

You know how to turn the flood gates on when you need more business, and off when you're at capacity. You have multiple effective lead sources defined, and have created a predictable marketing funnel for turning those leads into customers. You have step-by-step processes for everything from posting a blog to syndicating a video, and many of your marketing efforts could be outsourced if desired. Your content is created based on defined campaigns, and you have a full brand standards guide that describes the voice, tone and personality of your company.

WHAT IS YOUR SCORE?
_____ /12

How you convert prospects to customers and close deals.

Doing (1, 2, 3, 4) - This area is just getting started

The owner is the only or primary salesperson in the business, and selling your product or service has yet to become a science. Your sales calls are varied in nature, and you don't have a clear set of products or services to offer the customer. Objections are unexpected and hard to overcome, and closing sales is really a game of chance. Most of the time, you end up molding your product or service to fit the specific needs of each customer. Sales activity, if tracked at all, is tracked with piles of business cards, a notebook, a spreadsheet or perhaps sorting emails into folders.

Documenting (5, 6, 7, 8) - This area is becoming systematic

At this stage, your game is tracking your pipeline. Sales is slowly starting to become a science, and if you have a pile of leads or prospects, you can predict with relative accuracy when deals will close and how many customers will cross the finish line. Instead of paper and spreadsheets, you use a CRM or other tool to manage your pipeline and track a scoreboard of key performance indicators. Maybe some other members of your team are closing sales without you, but you don't yet have a sales machine that is infinitely scalable. Your product or service has become easier to sell, however, and you get to 'no' faster.

Delegating (9, 10, 11, 12) - This area is solid and scalable

As you build a sales team, you are no longer the primary rainmaker. In fact, you spend more of your time coaching and training others on improving their tactics than on doing sales yourself. You are confident in your sales 'playbook' and know that new hires can be up to speed and closing sales quickly. Objections and best practices are well documented, and the team communicates regularly to refine your processes. Your communication has become largely templated, and you use email templates or scripts to drive repeatable results. Now, individuals on your sales team are becoming specialists in different product lines or geographic markets to fine-tune their approach to a narrower set of customers.

WHAT IS YOUR SCORE?
_____ /12

Doing (1, 2, 3, 4) - This area is just getting started

Your financial processes are ad hoc. You bill for work when you get around to it, after doing the work is completed. Currently, you handle most of your financial responsibilities yourself, with the exception of a CPA for tax filing and other legal issues that are outside your expertise. However, finance in general feels outside of your expertise, and you always feel a bit 'behind'. Paying bills is reactive, and the squeakiest wheel gets the grease, so to speak. You run financial statements out of your accounting system, but you aren't sure that they are entirely accurate or very useful, so it isn't a high priority.

Documenting (5, 6, 7, 8) - This area is becoming systematic

Accounting and bookkeeping is beginning to feel automatic, and a less time-consuming function in your business. Either you have a trusted outside supplier or you have systematized the functions of time tracking, invoicing, collections, payroll, and taxes. You are consistent in your efforts; for instance, you add interest fees to overdue invoices, offer incentives for early payment, and review financial statements at the same time each month. You don't feel completely secure, however, as cash flow can be up and down, and few people have the keys to access the company's financial information.

Delegating (9, 10, 11, 12) - This area is solid and scalable

When it comes to money, your company is a well oiled machine. You do annual budgeting and forecasting exercises, and department heads take financial ownership over what they earn and what they spend. You have several trusted financial partners, or have assembled an in-house team of experts with the bandwidth to work on analytical projects that will improve your bottom line. Cash flow is predictable, and you have sources of capital to smooth out the expenses of the business and ensure everything operates smoothly. You can tell the financial health of the business by looking at key metrics, which are calculated by someone else on the team.

WHAT IS YOUR SCORE?
_____ /12

Doing (1, 2, 3, 4) - This area is just getting started

You don't start looking for your next hire until you desperately need them, which unfortunately has led to some selection missteps. Mostly, you hire friends and family out of convenience, and don't yet have a formal process for vetting candidates for a position. Job descriptions are non-specific, and the people that you bring onto the team are largely left to figure things out for themselves. There are a few bright spots on your team, and you are trying to figure out how to replicate them as you grow.

Documenting (5, 6, 7, 8) - This area is becoming systematic

You've made more than a couple hires at this point, and because you were methodical up front, they're sticking around. Your culture is starting to formalize, and core values lead your search and selection process to ensure that the people you're finding will fit. The hiring process is repeatable, and perhaps you're using an applicant tracking system (ATS) to manage candidates. Other members of your team have a hand in the hiring process. You offer opportunities for employee continuing education, but not everyone takes you up on them or is aligned with the value.

Delegating (9, 10, 11, 12) - This area is solid and scalable

If you needed to hire 50 people this month, you could. You have a repeatable process for posting jobs, creating job descriptions and scorecards to track an employee's performance, and getting them up to speed quickly in the organization. For key positions, you focus more on recruiting the right person directly than on selecting the best resume in the stack. You can anticipate when you will need more team members months or quarters in advance, and you have a team or committee fully trained in the hiring process and methodology. Interview questions are scripted and candidates are quantitatively measured, perhaps using personality or connotative assessments.

WHAT IS YOUR SCORE?
_____ /12

The tools that help make your company more efficient.

Doing (1, 2, 3, 4) - This area is just getting started

Today, the business isn't necessarily tech-enabled. You use email, but often text customers and employees directly, and a lot of business is done verbally or on paper. You've started looking into industry tools, but everything feels either too expensive or too complicated, and you frankly don't have the time to invest the energy in making a change. People talk about apps and websites that could be useful, but no one on your team is proficient enough to champion the selection process, so life goes on. Once you are more profitable or have a bigger team, then you will tackle the tech.

Documenting (5, 6, 7, 8) - This area is becoming systematic

The business is powered by a variety of tools, from personal productivity apps to industry specific applications, and things are working pretty well. You see technology as an investment in efficiency, and not an expense. One person on the team is the IT expert, and thankfully they don't seem to be going anywhere, because understanding how your technology works together would be like reading hieroglyphics without them. Technology isn't totally uniform, however. Certain people use certain tools, and there are a few options for how to get things done to accommodate less tech savvy employees.

Delegating (9, 10, 11, 12) - This area is solid and scalable

Your operations are scalable and your growth is limited more by people or marketing than it is by process. If you had twice as many clients or customers tomorrow, your current systems could handle the workload. You have made significant investments of time and/or money in setting up the right tools for your company, and everyone embraces them. New employees are given clear training on how to use software that is applicable to their role, and they have easy access to further training or support resources if needed. You are always running on the newest versions of the tools that you use, and everything is backed up, including the institutional knowledge about how tools work together, why tools were selected, and what the purpose of each technology is.

WHAT IS YOUR SCORE?
_____ /12

Doing (1, 2, 3, 4) - This area is just getting started

Right now, you lead by doing. Your focus is on setting a good example and being a player/coach. If you have other team members, your style of 'drive-by-delegation' isn't necessarily scalable or repeatable, but it gets the job done, and that's most important. You haven't yet established a formal employee review process, so you deal with urgent issues as needed without much of a plan for future performance or progress. Sometimes, it takes more effort to manage someone else through doing a job than to just do the job yourself.

Documenting (5, 6, 7, 8) - This area is becoming systematic

You have a team and you have a management rhythm. Your process of daily huddles or regular team meetings ensures that everyone has a clear sense of what is on their plate. At least quarterly, you take the time to connect with each person on your team individually for a review or a less formal check-in, but the lines of communication are always open. You are tracking your team's performance against the goals that you collaboratively set together. When you get feedback, which you solicit often, you act on it promptly. Your team is confident in your abilities and eager to follow your direction.

Delegating (9, 10, 11, 12) - This area is solid and scalable

Your organization has many teams, with many managers, and follows an organization-wide system of accountability. You set annual goals, quarterly objectives, and track key performance indicators to constantly know if you are on track or need to course correct. Managers receive ongoing development, education or training, and you promote from within because your managers develop strong employees. Managers spend far more time coaching than criticizing. Turnover is low, and you continue to hit monthly and quarterly targets. It honestly feels like you have an all-star team of talent, and you would enthusiastically rehire everyone that is working for you.

WHAT IS YOUR SCORE?
_____ /12

The Company Story _____ / 12

Rules of the Workplace _____ / 12

Products + Services _____ / 12

Your Primary Process _____ / 12

Marketing + Messaging _____ / 12

How You Sell _____ / 12

Financial Processes _____ / 12

Growing Your Team _____ / 12

Your Technology _____ / 12

Management _____ / 12

0 - 40 points
Doing

41 - 60 points
Developing

61 - 80 points
Documenting

81 - 100 points
Delegating

101 - 120 points
Dominating

YOUR OVERALL SCORE _____ /120

Trainual

Congratulations!

You have taken a massive leap forward in understanding the roadmap toward documenting your business.

What's next?

Now that you've taken the pulse on your business and know exactly what you need to work on documenting in order to organize your tribal knowledge, empower your people, and build a more systematized and scalable business, you need to put all that somewhere.

Trainual was purpose built to be the absolute best place to document every process, policy, and standard operating procedure in your business.

If you have all the need-to-knows and how-tos for every role and responsibility in one place, you can essentially automate your onboarding and training.

That means you can stop repeating yourself, stop getting stuck in the weeds of the day-to-day when you're the only person that does it *right*, and stop worrying about knowledge walking out the door when your team takes their next steps.

It's time to get your business out of your brain and try Trainual for 7-days free today! Click here to get started.