

THE LANDSCAPE

This section of the business assessment will help us ascertain the dynamics the operating environment of the company and your ability to fight the battle, scope for enhancing the value proposition and growth potential.

MAKET CHARACTERISTICS	KEY MARKETS	FLAGSHIP PRODUCTS/SERVICES
Outline the key characteristics of your industry and market in terms of business cycle, market size, addressability, degree of competition, supply dynamics, demand drivers, skill availability, consumption frequency, price sensitivity, cost of acquisition, unit economics, entry & exit barriers, regulatory environment, etc., which are either favourable or non-favourable for future growth	List your key markets i.e. geographic locations where your clients/accounts are concentrated in the order of their volume (count) or value (revenue) considering the average of last 3 years	List the products/services which are consistently contributing more than 80% of the revenue during last 3 years and also you have earned reputation of delivering them in those key markets

PRIMARY CUSTOMER SEGMENTS	SECONDARY CUSTOMER SEGMENTS	KEY COMPETITORS
Which of your customer segments are likely to be attracted by your products/services and can be retained with less efforts given your value proposition. This could be your niche customer segment too.	Which of your customer segment are fairly difficult to address, varied consumption patterns, higher price sensitivity and keep switching between various alternatives	Outline at least 3 competitors who can compete for your primary customer segments and another 2 competitors who can grab your secondary segment. You may also list oblique competitors if any who are strong contenders for your products



THE NAVIGATOR

This section of the business assessment will help us evaluate the clarity of thought and focus about the journey of value creation and assessing the compatibility & capability of leadership team to create the desired value.

CHARTER	DIRECTION	LEADERSHIP																																																															
<p>VISION Outline the purpose of the existence of your company and what you have dreamt about its future. You may try to define a formal vision if that doesn't exist as of now.</p> <p>MISSION Outline your clarity and focus on whom do you want to serve and what value will be offered to them and how do you expect your employees to align in order to drive their actions and behaviour to deliver the same</p> <p>OBJECTIVES Outline your desired actions to be achieved and/or milestones to be attained in order to accomplish your mission</p>	<p>STRATEGY Outline your business strategy in less than 100 words. Strategy is a set of business activities carried out by your firm to deliver the envisaged value proposition to your target customers in order to gain the competitive advantage</p> <p>GOALS</p> <p>1. CUSTOMERS</p> <p>2. EMPLOYEES</p> <p>3. SHAREHOLDERS</p>	<p>TEAM List the details of leadership team and frontline managers who are accountable for key business functions at your company</p> <table border="1" data-bbox="1503 544 2159 844"> <thead> <tr> <th>NAME</th> <th>DESIGNATION</th> <th>TENURE</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table> <p>Please rate the above team members in terms of the following leadership qualities in the scale of 1-10, 1 being the poor and 10 being the best-in-class</p> <table border="1" data-bbox="1503 1008 2159 1308"> <thead> <tr> <th>NAME</th> <th>DIRECTION</th> <th>ALIGNMENT</th> <th>COMMITMENT</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>	NAME	DESIGNATION	TENURE																									NAME	DIRECTION	ALIGNMENT	COMMITMENT																																
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THE CORE

This section of the assessment will help us evaluate the building blocks of core business functions and their capacities, capabilities and performance as on date to discover the scope for improvement in these growth engines.

MARKETING	SALES	FULFILLMENT
<p><input type="checkbox"/> CHANNELS What are the existing marketing channels where marketing dollars are spent to create awareness and generate leads?</p> <p><input type="checkbox"/> CONTENT ASSETS Furnish us the list of content assets produced for the purpose of marketing and provide the access for review their effectiveness</p> <p><input type="checkbox"/> CALENDAR Allow us to review your marketing calendar to understand the details of your marketing plan and how various activities are scheduled</p> <p><input type="checkbox"/> KEY METRICS Allow us to track your key marketing metrics to measure the impact and success rate of your campaigns</p> <p><input type="checkbox"/> FUNNEL ANALYSIS Detailed review of your funnel helps us understand the rationale behind mapping of various stages and conversion dynamics to compare with industry benchmarks if any</p> <p>KEY METRICS</p> <p>Budget Per Month: _____ Leads Per Month: _____ FRT: _____ Hrs/Days Cost Per Lead: _____ ROI: _____</p>	<p><input type="checkbox"/> CHANNELS What are the existing sales channels through which your products/services are offered and their contribution to your sales</p> <p><input type="checkbox"/> SALES ORG Detailed review of how the sales organization is structured in alignment with business and marketing plan in terms of unit design, leadership, territory planning and resource allocation</p> <p><input type="checkbox"/> SALES PROCESS Review of your existing stages of sales and key tasks performed by your sales reps in alignment with your customer buying process</p> <p><input type="checkbox"/> 3D FUNNEL Detailed review of your sales funnel in 3 different markets i.e. virgin, competitive and over-saturated markets to understand the conversion challenges and explore the growth opportunities</p> <p><input type="checkbox"/> SALES ANALYSIS Detailed review of sales forecasts and trends of last 2 years to determine the gaps and scope for improvement in our sales strategy</p> <p>KEY METRICS</p> <p>Conversion %: _____ ALCC: _____ Days Customer Growth (%): _____ ASP: _____ Revenue Per Employee: _____</p>	<p><input type="checkbox"/> DELIVERY ORG Detailed review of how the service delivery organization is structured to meet client needs through appropriate culture, unit design, leadership, skill matrix, processes & systems and resource allocation</p> <p><input type="checkbox"/> ONBOARDING PROCESS Review of existing customer onboarding process, experience and best practices if any to empower them to take best value from your products/services</p> <p><input type="checkbox"/> SUPPORT CHANNELS Detailed review of your multi-channel customer service approach to understand the channel mix, KPIs to the gauge the effectiveness of your service staff and assess the employee awareness about service needs of your customers</p> <p><input type="checkbox"/> CUSTOMER SUCCESS Review the existing metrics of customer success, how the tracking is done, how the customers are profiled & segmented to engage them effectively and how those learnings feed your business strategy</p> <p>KEY METRICS</p> <p>Average Delivery/Onboarding Time: _____ Resolution TAT: _____ NPS/CSAT SCORE: _____ Renewal Rate (%): _____ Account Growth: _____</p>
<p>MARKETING STACK</p> <p><input type="checkbox"/> Analytics <input type="checkbox"/> CMS <input type="checkbox"/> Social Media <input type="checkbox"/> CRM <input type="checkbox"/> Marketing Automation <input type="checkbox"/> Others</p>	<p>SALES STACK</p> <p><input type="checkbox"/> E-Commerce <input type="checkbox"/> Live Chat <input type="checkbox"/> Demo <input type="checkbox"/> Communication <input type="checkbox"/> CRM <input type="checkbox"/> Billing/Invoicing</p>	<p>CUSTOMER STACK</p> <p><input type="checkbox"/> LIVE CHAT <input type="checkbox"/> CALL CENTER <input type="checkbox"/> HELPDESK <input type="checkbox"/> FEEDBACK <input type="checkbox"/> CRM <input type="checkbox"/> PM+COMMS</p>

THE INVISIBLE

Last but not least, the role of people function, financial controls and support functions are inevitable and thus evaluating how they are managed by leadership team opens the doors for improving customer experience and enterprise value.

PEOPLE PULSE	SUPPORT FUNCTIONS	FINANCIAL CONTROLS
<p>HYGIENE FACTORS Mark the applicable status for the following factors;</p> <p>Is every job role defined with detailed responsibilities, KRAs, KPIs and selection criteria? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Do you have formal induction & training program for each role? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Do you run the payroll on-time every month? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Do you have active incentive program in alignment with business objectives? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Does your business comply with labour laws and other statutory requirements? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>KEY METRICS Average Salary: _____ Cost per Hire: _____ Average Hiring Time: _____ Days Absenteeism (%): _____ Absconding Rate (%): _____ Employee Referrals (%): _____ Employee Attrition (%): _____</p> <p>ESI SCORE* HYGIENE SCORE: _____ MOTIVATION SCORE: _____</p>	<p>ENABLERS Choose the support functions which are applicable for your business to serve the internal customers who are instrumental in serving the end-consumers</p> <p><input type="checkbox"/> HR <input type="checkbox"/> IT <input type="checkbox"/> F&A <input type="checkbox"/> LEGAL <input type="checkbox"/> PR <input type="checkbox"/> SUPPLY CHAIN <input type="checkbox"/> DISTRIBUTION <input type="checkbox"/> LOGISTICS <input type="checkbox"/> ADMIN <input type="checkbox"/> INFRA <input type="checkbox"/> FACILITY <input type="checkbox"/> QUALITY CONTROL <input type="checkbox"/> ENGINEERING <input type="checkbox"/> R&D</p> <p>PURPOSE How do you perceive the role of support functions in your organization?</p> <p><input type="checkbox"/> Transactional Support <input type="checkbox"/> Cost Centre <input type="checkbox"/> Enhance Productivity & Efficiency <input type="checkbox"/> Improve Customer Satisfaction <input type="checkbox"/> Strategic Value</p> <p>CAPABILITIES How do you rate your support functions in terms of their capabilities and integration with core business functions to deliver the desired value proposition?</p> <p>Basic capabilities needed to just run the operations smoothly Competitive capabilities enable you to compete in the industry Differentiating capabilities provides a distinctive advantage to outperform others</p> <p><input type="checkbox"/> BASIC <input type="checkbox"/> COMPETITIVE <input type="checkbox"/> DIFFERENTIATING</p>	<p>HYGIENE FACTORS Mark the applicable status of the following key processes of managing your financial resources;</p> <p>Is your book keeping timely and accurate with a clear ownership? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Is your A/R process flawless and integrated with sales and fulfilment function? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Is your A/P process legitimate, accurate and timely and integrated with support functions? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Does your company comply with regulatory & statutory payments within deadlines? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>Do you take business decisions based on the detailed review of monthly financial statements? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>RED FLAGS Mark the sources of financial distress which are bothering your organization currently, if any;</p> <p><input type="checkbox"/> Poor Operating Margin <input type="checkbox"/> Negative Cashflows <input type="checkbox"/> Aged Receivables <input type="checkbox"/> Unsold/Loss of Inventory <input type="checkbox"/> Outstanding Statutory Dues <input type="checkbox"/> Outstanding Debts <input type="checkbox"/> Accounting Frauds</p>