



Business Status & Scalability Analysis

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A close-up photograph of a person's hands working on a tablet. The person is wearing a light blue and white striped shirt. They are holding a white pen in their right hand and a small yellow sticky note in their left hand. The tablet is on a desk, and there are other papers and a laptop keyboard visible in the background.

Overview

This guide walks you through conducting a process status and scalability analysis for your business, and has been designed to allow completion as quickly or as deeply as you prefer.

For 5 key business areas, you'll be rating the overall status, level of risk, and ability to scale in its current state. You'll also be identifying opportunities for improved expense efficiency.

By identifying and prioritizing the areas of your business most in need of process development and systemization, you'll have a prioritized roadmap for increasing your revenue and profits, increasing ROI on your team time, and an effective dashboard for monitoring the ongoing status and scalability of your organization.

To go deeper with this analysis, I invite you to book your private business acceleration strategy session [here](#), or contact me directly.

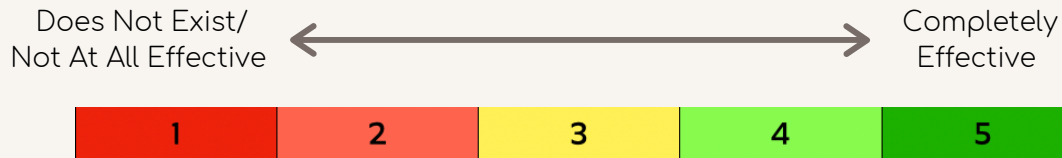
To your ongoing success,

Karen

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Critical Business Areas

1) Rate each business area below on a scale of 1 to 5. Examples of items to consider for each area are provided on the following pages.



2) How high is the risk to your business if the processes and systems in the specified business area stop working or are not effective/efficient? Consider applicable laws and regulations, as well as, impact to client/customer deliverables and their experience. Check the 'Risk' box if the risk is High.

3) Depending on the size of your business, consider if 10, 100, 1,000, or 100,000 clients/customers or products sold were suddenly added to your pipeline. Could your processes and systems in the specified business area handle the new volume? Check the 'Scalability' box if the area could not handle a significant increase in business.

	Rating (1-5)	Risk	Scalability
TEAM & ORGANIZATIONAL STRUCTURE	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
MARKETING & SALES	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
CLIENT/CUSTOMER EXPERIENCE	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
SERVICE/PRODUCT FULFILLMENT	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
FINANCIALS: REVENUE & PROFIT	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
OTHER _____	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Things to Consider

When rating each business area, consider the existence and effectiveness of the example items below, and any additional factors specific to your organization.

TEAM & ORGANIZATIONAL STRUCTURE

- ☐ Intentional organizational structure and job descriptions are in place.
- ☐ Effective onboarding and training programs are in place.
- ☐ Team members are clear on the organization's overall objectives, their role responsibilities, management expectations, and meet/exceed expectations.

MARKETING & SALES

- ☐ Marketing Messages & Lead Generation are in place and effective.
- ☐ Marketing and Sales Metrics are available, applicable, and used for decision-making.
- ☐ Team Productivity & Closing Rates are high.
- ☐ Repeat Sales are measured and high.
- ☐ Follow-up and Ongoing Communications are in place and effective.

CLIENT/CUSTOMER EXPERIENCE

- ☐ Clients/Customers respond favorably to marketing materials.
- ☐ Purchasing a product/service is easy.
- ☐ Product/Service is delivered as agreed or beyond expectations.
- ☐ Client/Customer Service/Support/Call Center is responsive and effective.
- ☐ Community Exposure and Activities are positive; Reputation is high.
- ☐ Other communications are clear and appropriate.

SERVICE/PRODUCT FULFILLMENT

- ☐ Client/Customer Onboarding is consistent and effective.
- ☐ Service/Product Fulfillment processes are in place and effective.
- ☐ Transportation and Logistics ensure prompt delivery and service.
- ☐ Inventory levels are appropriate.
- ☐ Client/Customer Service/Support/Call Center has effective processes in place.

FINANCIALS: REVENUE & PROFIT

- ☐ Actionable and Appropriate Metrics are identified and collected.
- ☐ Metrics and Results are known & monitored proactively.
- ☐ Overhead is managed appropriately and actively.
- ☐ Appropriate Action is taken when necessary.

Cost Considerations & Summary

COSTS OF INEFFICIENCY/OPPORTUNITIES

In addition to knowing your revenue and profit numbers, it is important to identify where inefficiencies could be impacting your expenses. Considering the cost in each area, what are inefficiencies costing you today? What would an increase in efficiency give back to your business?

Example - Overall Payroll (Team & Organizational Structure)

Payroll Expense = \$125,000/month

Estimated Efficiency % = 85

Opportunity = $125,000 - (125,000 * 85\%) = \$18,750$ Per Month

Your Numbers

Payroll Expense Per Month:

Estimated % of Efficiency of Team:

Opportunity Per Month = $\text{Payroll} - (\text{Payroll} * \text{Efficiency \%})$

In what other areas can you identify potential financial efficiency opportunities in your business? Examples: Manufacturing, Office Space, Product/Supply Procurement.

Prioritization: The area(s) with the lowest scores are the areas needing the most improvement in process and systemization. To determine prioritization, also take into consideration the associated Risk, Scalability and Financial Efficiency Opportunity.

Prioritization

1

4

2

5

3

6

Congratulations!

The analysis you've completed in this guide is the first step in ensuring your business not only thrives but is also primed for growth and sustainability.

Hello! I'm Karen Cox, Founder of KCLICK Thinking LLC. With decades of hands-on and managerial experience including within Fortune 100 companies, I've created a system for designing and implementing business processes to help business owners overcome key obstacles so you can:

- Strategically structure your business for growth, revenue and ROI;
- Confidently hire the right team members for the right roles; and
- Focus your attention on the activities that move your business forward.



Whether your company is in a phase of quick, booming growth and you're trying to keep up with the fast pace or you're facing a plateau and need a new level of structure to breakthrough to the next level, we'll dial-in the right level of detail, process and systems that your business needs now and as it grows.

INVITATION

Book your private business acceleration strategy session [here](#).

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