Agenda

- Welcome and Introductions
  Kathy, Shawn, John
- Entrepreneur Fund and Greenstone Group
- Review of Assessment Tool
- How the tool can be used
- Q & A
Entrepreneur Fund

Mission

Focus on local entrepreneur
Client segmentation by skills

Tools

CORE FOUR – Business Planning Course – 17 years
Skills Assessment
BE Strategic – Growing Your Business
Business Performance Coaching

Customer Segmentation

- CEO Tier Level

Tier Four
“Beyond CEO”

Tier Three
“CEO”

Tier Two
“Manager”

Tier One
“Operator”

Stage of Business

Existing | Early Growth | Growth | Maturity | Decline
Entrepreneur Fund

- Five years – Greenstone Group Initiative
- 70 individuals in coaching
- 100+ in Be Strategic
- Measurement Indicators
- Supporting entrepreneurs to develop skills and grow businesses
- Business Performance Coaching
- Be Strategic: Grow Your Business

Skill Assessment

- Business Performance Coaching
  - Purpose of skill assessment tool
    - Screening - Application, Assessment and Interview
    - Coaching Assignment – CEO Level (Operator, Manager, CEO)
    - Skill Development Tracking – Annual update
      - Move up one level in coaching (30% goal)
      - Administered at intake and annually
Skill Assessment

• Five categories
  – Management
  – Finance
  – Sales
  – Marketing
  – Product Development

• 2 layers of Questions
  – Knowledge
  – How do you use it
Skill Assessment

- Each question is scored and weighted
- Each category has a total score 40 to 80 points
- Total score for individual
- Scores divided into three levels
  - CEO level One – operator
  - CEO level Two – manager
  - CEO level Three - CEO

Skill Assessment

- Scores graphed with highs and lows
- Strengths and weaknesses

- Individual
- Interview
- Coach
- Annual Self Evaluation
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<th>Total Questions</th>
<th>Score</th>
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Sample Questions

1. I have prior sales experience in my industry and target market.
2. I regularly analyze our sales data for the buying patterns of our customers to improve sales.
3. How do you rate your skills in direct skills?
4. How would you rate your personal success in managing sales for your company?
5. I regularly use profit forecasting to manage my business?
6. I use a balance sheet and income statement to compare actuals against my business plan projections each month.
7. We prepare quarterly sales forecasts in the business.
8. My company has a formal written business plan that sets out our goals and operations plan.
9. My company sets goals and breaks them down into quarterly, monthly, weekly objectives for implementation.

Assessment Tool

• Other Uses

• John Hamilton
Q & A

Discussion

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