THE DONALD COOPER CORPORATION

Speaking and coaching internationally on management, marketing and profitability

'Welcome' to Donald's complete set of 'Business Assessment and Management Implementation Tools':

We all need to spend more time proactively working 'ON' our business…but where to start and how to go about it?

Our complete set of copyrighted **Business Assessment & Management Implementation Tools** is an excellent place to start. These tools and templates gently ask the tough questions and guide you to making wise decisions and taking more effective action in the key areas of management, marketing, creating compelling customer value, attracting and keeping great staff and improving your bottom line.

For additional help with planning the future of your business, you can purchase our 40-page **Vision Critical Guide**, as a downloadable PDF, for just $24 at our website, **donaldcooper.com**.

Below is a complete list of the **Tools and Templates** and a brief description of how each will be helpful. They are divided into two sections. **Part #1**: 'Business Assessment Tools' and **Part #2**: 'Management Implementation Tools'.

Part #1: Your Business Assessment Tools:

1. **Tool #A-1**: **The Business Key Challenge Audit Sheet:** (this Tool is electronically 'fillable')

    In just 5 minutes, identify the key challenges and opportunities that need to be addressed in your business. Have each person on your management and supervisory team complete this sheet and see if 'everyone is on the same page'…who 'gets it'…and who doesn't.

2. **Tool #A-2**: **The Service Challenge Audit Sheet:** (this Tool is electronically 'fillable')

    Failure to deliver world class service and customer experiences on the front line is almost always a symptom of management, communication, systems or process problems in the business. Use this 1-page 'Service Challenge Audit' to identify and address the real problems.

3. **Tool #A-3**: **The internal, external and regulatory challenge tool:**

    Use this template to explore in detail the internal, external and regulatory challenges that you face, and how to address them.

4. **Tool #A-4**: **As business owners, leaders and managers our 1st job is clarity:** (this Tool is electronically 'fillable')

    This Tool is designed to help improve 'clarity' in your business. Only by improving clarity can we improve commitment, urgency, accountability and profitability. Use this Tool to take the 'Clarity Challenge' for your business.

5. <u>**Tool #A-5**</u>: **Disruption and innovation: What or who might disrupt your industry, your market and your business? Will you be the 'disruptor'...or will you be the victim of disruption?**

   Every industry is being disrupted by new technologies, new business models and innovative thinking. Use this Tool to evaluate the many ways that your industry and your business might be disrupted...and whether you will lead that disruption...or be the victim of it.

6. <u>**Tool #A-6**</u>: **9 ways that technology can deliver the competitive advantage you need:**

   Technology can give you a competitive and profitability advantage in every part of your business. Use this check-list to determine exactly where you can benefit.

7. <u>**Tool #A-7**</u>:   **9 'stream of conciseness' statements to better understand your business, your market...and your customers' perceptions:**

   This Tool is a strong reality check regarding the strength and clarity of your market positioning and of your own perception of your customers and your business.

8. <u>**Tool #A-8**</u>:   **Defining "Success" in your business and your life:** (this Tool is electronically 'fillable')

   If we can't define "success", how can we achieve it? Use this insightful template to clarify what Success will look like for you, your family and your Team.

9. <u>**Tool #A-9**</u>:   **Rate your leadership ability:**

   This 2-page Tool will help you clarify and improve your leadership style and effectiveness.

10. <u>**Tool #A-10**</u>:   **In business and life, trusting the right people is key to your success:**

    Use this simple Trust Meter to check out your 'trust intuition'.

11. <u>**Tool #A-11**</u>: **Partnership and family business audit sheet:**   (this Tool is electronically 'fillable')

    There are 6 key reasons why partnerships or family businesses often don't work...and a number of secondary reasons. This 2-page Audit Sheet will help identify the problem areas that need to be addressed in your partnership or family business.

12. <u>**Tool #A-12**</u>:   **Problems on the 'front line' are a symptom of problems higher up:**

    What happens on your 'front line' has a huge impact on your bottom line. But, when things go wrong on the front line, it's almost always a symptom of problems further 'up' in the organization.

13. <u>**Tool #A-13**</u>:   **6 reasons why new businesses fail:**

    This Tool will be especially helpful to those who have recently started a business...or who are considering doing so.

14. **Tool #A-14**: **What can you do to increase sales?**

Sales will not automatically increase just because you want them to. And there's much more to increasing sales than just adding more sales staff, running another ad, or creating another brand destroying 'Special sale'. This multi-page template asks a series of key questions that will trigger real insight as to how to increase sales…profitably.

15. **Tool #A-15**: **A reality check of your advertising:**

Much of the money spent on advertising is simply wasted. Some of is even brand-destroying. Don't spend another penny on advertising without checking this 1-page Tool.

16. **Tool #A-16**: **Have you created an effective 'Team Culture'?**

This 1-page, 10 point 'Cultural Audit' will help you and your team determine the health of your business culture…and what might need fixing.

17. **Tool #A-17**: **Evaluate your 'talent pipeline':**

Use this Tool to evaluate the strength of your 'Talent Pipeline'. To use a sports analogy, do you have the 'bench strength' to sustain and grow your business? Where do you need additional talent?

18. **Tool #A-18**: **The many faces of training**…and a bonus idea you've likely not thought of:

You can't grow your business without growing your people. There are 12 specific types of training and development that are important in every business. Use this tool to rate your company's performance in each of these 12 types of training.

19. **Tool #A-19**: **Is our business a desirable place to work?**

Use this Tool and its 10-point Survey to determine a 'Desirability Score' for your business and to identify the areas in which you can improve in order to be more attractive to top performers.

20. **Tool #A-20**: **The importance of fixing the real problems in your business:**

There's a tendency for all of us to focus on the surface problems in our business and not on the underlying and real basic problems because the surface problems are more obvious, easier to address and much less threatening. But we'll never solve anything without digging deeper, no matter how uncomfortable it gets. This Tool will help you to address the real basic challenges.

21. **Tool #A-21**: **The 10 Keys to 'Employee Engagement'. How do you rate?**

Employee Engagement is hot topic…and so it should be! It's the key to employee productivity and retention. Use this 1-page Tool to rate your business on the '10 Keys to Employee Retention' and to see where and how you can improve.

22. **Tool #A-22**: **Possible reasons for our lack of Profitability.** (this Tool is electronically 'fillable')

Low profitability is a symptom of Business Model or Operational problems. Use this insightful checklist as a Tool to identify those factors that might be causing low profitability in your business.

23. **Tool #A23**:   The 'Top 10' things that good employees want…how do you rate?   (this Tool is electronically 'fillable')

Use this Tool to rate how your business is doing in delivering the 'Top 10' things that most good employees want.

Part #2: Your Management Implementation Tools:

1. **Tool #B-1**:   In our business, who's proactively 'running the show'? The 'straight goods' about working 'ON' your business!

Most business owners and managers spend 90% of their time working 'IN" the business and less than 10% of their time proactively working 'ON' it. Use this Tool to get real help on how to work 'ON' the business.

2. **Tool #B-2**:   Create a clear 'Statement of Purpose' for your business:

Your business, and every person in it, should be clear about your 'purpose'. This Tool will help you create a clear 1-page statement of why you're in business.

3. **Tool #B-3**:   A fundamental 'value decision' that every business must make:

Every business must decide if it will be the cheapest…or not be the cheapest. Why? Because every other decision you make depends on this key 'value decision'. Use this Tool to create clarity about your 'value position'.

4. **Tool #B-4**:   Clarifying your profit commitment for the next few years:

Use this set of simple templates to plan your sales and profit commitments for the next few years…and the key moves that must be made to get there.

5. **Tool #B-5**:   The 'backwards' approach to profitability:

Your profit is something you plan for…not something you hope for. Use this Tool to determine how much profit you need to generate to be successful…and how to make that happen.

6. **Tool #B-6**:   The math of improving profitability:

Small improvements in pricing, sales and operating efficiency can have a huge impact on your bottom line. Use this Tool to determine exactly how this will work in your business.

7. **Tool #B-7**:   13 questions to ask to make this *or* next year your best year ever:

These 13 questions look at every part of your business to trigger insights that will help you create your most successful year ever. Use this Tool each year as part of your regular business planning process.

8. **Tool #B-8**:   When you sell your business, what are you really selling?

In just 2 minutes, learn why your business may not be saleable…and how you can fix that.

9. **Tool #B-9**: **Redefining our business by how we 'help'…not by what we sell:**
This transformational 'redefine' process will create clear and compelling customer value and experiences that will 'grab' your target customers, clearly differentiate you from your competitors, make you 'famous'…and grow your bottom line.

10. **Tool #B-10**: **Create Compelling customer Value & Experiences!**
People are loyal to what's best for them…or what they assume is best for them. This Tool asks 6 key questions to determine who our target customers are, what life is *really* like for them and how to use those insights to create clear and compelling value and experiences that will 'grab' our target customers, clearly differentiate us from our competitors, make us 'famous'…and grow our bottom line.

11. **Tool #B-11**: **What are we 'famous' for?**
If we're not 'famous' for something…we're an undifferentiated commodity. So what are we 'famous' for…or what could we be 'famous' for? Use this 4 page Template to determine what 'famous' could look like in our business…and how to achieve it.

12. **Tool #B-12**: **Creating or clarifying your powerful Brand:**
Businesses with a powerful 'brand' typically have more loyal customers and higher profits. Use this Tool to define and strengthen your brand.

13. **Tool #B-13**: **6 approaches to promoting from within:**
Most businesses talk about the importance of creating a career path for their best people and promoting from within. But most businesses also get it wrong. This Tool shows the most effective approach to getting it right.

14. **Tool #B-14**: **What do your customers want more of?**
We'd all like our customers to do more business with us. But what are you prepared to do 'more of' for them, to earn that additional business? Here's an insightful exercise that will identify specific things to do more of, or to do better, to increase sales and profitability.

15. **Tool #B-15**: **The 'backwards' approach to creating new products or services:**
Use this unique but very effective shift in thinking to create new products, services or customer experiences that give you an 'unfair' competitive advantage.

16. **Tool #B-16**: **Communicating your value story:**
Everything you do communicates. Use this multi-page Template to create a clear and consistent message that gets you noticed, remembered, trusted and preferred.

17. **Tool #B-17**: **Tips for better business cards:**
Business cards are not obsolete…but they have to be done right. Use this Tool to create a business card that is an actionable marketing document.

18. **Tool #B-18**:   **17 Keys to creating a Winning Culture in your business:** (this Tool is electronically 'fillable')

Use this insightful 1-page Tool to assess your current business culture…and develop insights into how to improve it.

19. **Tool #B-19**: **Attracting and retaining a top-performing team:**

Use this 4-page Tool to determine what kind of business the best people in your industry want to work for and how you can become that business.

20. **Tool #B-20**: **Employment candidate evaluation tool:**

This 'Tool' will help you evaluate job candidates in a clear and organized way by allowing you to create a '**Suitability Score'** for each candidate interviewed for any job.

21. **Tool #B-21**: **14 possible reasons for your staff not performing:**

Staff not performing is one of the biggest problems in most businesses today. Use this Tool to determine why your staff may not be performing…and how to fix it.

22. **Tool #B-22**: **20 ways to help your staff 'feel' important…and be more engaged:**

Use this Tool to learn 20 specific things you can do to help your employees understand that   they're important…and to be more engaged.

23. **Tool #B-23**: **A 'Skills Inventory' of your Team:**

Use this Tool to discover the many skills, talents and abilities that your staff have…that you didn't even know about. This can be a real eye-opener.

24. **Tool #B-24**: **The 'Employment Experience Survey' tool:**

Use this Tool to survey your employee's thoughts and feelings about the employment experience in your business.

25. **Tool #B-25**: **The math of selling your business for the price you need…to have the retirement you want:**

Use this Tool to calculate how much money you need to get when you sell your business to have the retirement you want…and to think about what needs fixing in your business to get that price.

26. **Tool #B-26**: **How to delegate, get more done and grow your people…without losing control:**

Use this tool to make the important transition from being the business owner or manager who does and decides everything themselves to the person who develops and leads a team of talented, engaged people who make things happen.

27. **Tool #B-27**: **The 4 types of employees in your business…how they're different and how to manage them:**

Businesses typically 4 different types of employees from super star top-performers to toxic trouble makers. They all need to be managed differently because they're 'wired' differently. Use this Tool to get important insights on how to manage these different groups.

28. **Tool #B-28**:   **4 key questions to ask about talent, technology and training:**

The 3 'Ts' of business success are **'talent, technology and training'.** Use this Tool to improve these three key areas of your business.

29. **Tool #B-29**:   **16 Tips to improve management effectiveness in your business:**

Donald's insightful list of the many ways you can improve management effectiveness has helped hundreds of clients around the world.

30. **Tool #B-30**:   **The importance of developing 'Wise Investor Thinking' in your business:**

Use this Tool to analyse the value and vulnerability of your business from an investor's viewpoint.

31. **Tool #B-31**:   **3 simple tips for more effective implementation:**

Ineffective implementation is one of the biggest challenges in many businesses today. We have ideas, we have goals and targets and set deadlines…but stuff doesn't get done. These 3 simple tips on how to implement more effectively are based on Donald's years of business coaching around the world.

32. **Tool #B-32**:   **Why you need an expert 'Succession & Exit Advisor Team':**

Planning and executing your Succession Plan, sale and exit from your business is likely the biggest financial event of your life and it's not a 'do-it-yourself' project. You need an Advisor Team of experienced professionals. This Tool tells you who should be on your Team…and why.

33. **Tool #B-33**:   **The 'Employee Self-Assessment Tool':**

Employee self-assessment can be an important part of the performance review process for many of your team members. This Biz Tool gives you a simple framework to make it happen.

34. **Tool #B-34**:   **Create brief 'Profit Plans' for your business at various future sales levels:**

Use this 'future planning Tool' to create brief pro-forma 'Profit Plans' for your business at various future sales levels.

35. **Tool #B-35**:   **Your complete Guide to creating an effective 'Annual Business Plan' for your business:**

There's much confusion as to what a Business Plan is and how to create one that works. Use Donald's comprehensive step-by-step Guide to create an effective 'Annual Business Plan' for your business. A Biz Plan that creates clarity, commitment, urgency and accountability. A Plan that engages your Team…and gets 'stuff' done.