

14 Elements of a Successful Business™

Business Operating System

I am using a comprehensive, process-driven system to run my company (e.g., EOS®, Scaling Up, or similar).

Recruiting

I have a process for consistently finding and hiring high-quality talent at all levels of my organization.

Finance

Our monthly budget and cash flow review meetings are creating Next Steps that help us achieve our monthly, quarterly and annual financial goals.

Strategy

Our Senior Leadership Team understands the importance of strategy and is committed to taking the time to ensure it is set up to maximize the company's growth.

Sales

My business has a strong sales function that consistently hits its weekly, quarterly, and annual targets.

Marketing

I am consistently executing an effective marketing plan that generates enough leads to fill my sales funnel.

Employee/ Customer Engagement

I have consistent touch points with employees and customers and foster feedback, innovation, and peer to peer recognition.

Technology

I regularly review and update my 'tech stack' to make my business more efficient, effective, and profitable, and to reduce risk.

Professional Development

I continually find ways to provide professional development and ongoing learning for my Senior Leadership Team.

Project Management

I have a system in place for ensuring that projects are managed through to completion.

Compliance

I am aware of, complying with, and constantly monitoring all regulations (labor, tax, industry, etc.) that may relate to my business.

Personal Wellbeing

My personal and home life are healthy, enriching, and fulfilling.

Wealth Management

I have an ongoing process for ensuring that my short-and-long-term finances are well-managed to meet my lifestyle needs as well as my investment objectives.

M&A

I have a strategy for capitalizing on the value of my business (i.e., my exit or continuity plan).