



Executive Self-Assessment Tool: *Business Performance Readiness*

Instructions

By yourself or with your executive team, think through these questions as candidly as possible and record your answers. For large organizations, this exercise may benefit from perspectives across divisions, geographies, and functions. The sum of your answers represents your readiness score, with a higher score being better. You can skip sections that are not relevant to your organization or role.

Sections

- 1.0 Planning & Strategy
- 2.0 Marketing
- 3.0 Sales
- 4.0 Procurement
- 5.0 Finance
- 6.0 Technology
- 7.0 Organization & People

Point assignment: “No” is 0 points, “Somewhat” is 1 point, and “Yes” is 2 points.

Scoring key:

	Per Section	All Sections
High Risk	0 – 3	0 - 25
Improvement Needed	4 - 6	26 - 46
Refinement Potential	7 - 8	47 - 63
High Performing	9 - 10	64 - 70

Visit joesagrilla.com to schedule a call to discuss your results with a business performance specialist.

1.0 PLANNING & STRATEGY

1.1) Each group has well-defined plans and targets for the year that align with our overall company strategy.

☐ No

☐ Somewhat

☐ Yes

1.2) Our key leaders understand market trends and business drivers, and how they impact plans; mechanisms are in place to monitor plan assumptions and adjust plans as needed.

☐ No

☐ Somewhat

☐ Yes

1.3) Our teams have specific strategies to overcome hurdles or capitalize on market trends in pursuit of goals.

☐ No

☐ Somewhat

☐ Yes

1.4) Our leaders have chosen strategies that leverage the company's key resources and distinctive capabilities.

☐ No

☐ Somewhat

☐ Yes

1.5) Key enablers needed for plan execution (organizational structures, resource allocations, processes, etc.) are in place.

☐ No

☐ Somewhat

☐ Yes

SECTION TOTAL:

2.0 MARKETING

2.1) Our marketing strategies are rooted in a strong understanding of customer segments and customer journeys.

☐ No

☐ Somewhat

☐ Yes

2.2) Our products draw upon distinctive company capabilities and are competitively positioned in their respective segments.

☐ No

☐ Somewhat

☐ Yes

2.3) Our brand position makes a clear promise to customers about our products; branding is consistent across brand position, identity, and voice.

☐ No

☐ Somewhat

☐ Yes

2.4) Advertising campaigns and other promotions are assessed using standard KPIs like ROI, conversion rate, cost per acquisition, etc.

☐ No

☐ Somewhat

☐ Yes

2.5) We have analytics in place to support key processes including product design, pricing, customer sentiment analysis, channel analysis, etc.

☐ No

☐ Somewhat

☐ Yes

SECTION TOTAL:

3.0 SALES

3.1) Our sales team is organized optimally to serve customers, drive growth, and collaborate internally.

☐ No

☐ Somewhat

☐ Yes

3.2) We have an effective, repeatable sales pipeline process.

☐ No

☐ Somewhat

☐ Yes

3.3) Our leadership has clear visibility to the status of large opportunities and sales activity at key accounts.

☐ No

☐ Somewhat

☐ Yes

3.4) Incentives for the sales organization are motivating to employees and drive the right behaviors for the business and our customers.

☐ No

☐ Somewhat

☐ Yes

3.5) The sales team understands profitability drivers and is trained to analyze tradeoffs across price, volume, mix, account strategy, etc.; our sales policies properly balance control and flexibility.

☐ No

☐ Somewhat

☐ Yes

SECTION TOTAL:

4.0 PROCUREMENT

4.1) Procurement is seen as a key business partner that not only helps fulfill requests and manage cost, but also optimizes value from vendor relationships.

☐ No

☐ Somewhat

☐ Yes

4.2) Procurement has mature capabilities for category management and vendor management.

☐ No

☐ Somewhat

☐ Yes

4.3) Procurement systematically uses advanced cost reduction tactics (e.g., reverse auctioning, dynamic discounting, TCO analysis).

☐ No

☐ Somewhat

☐ Yes

4.4) Our procurement processes have been digitized across the full source-to-pay cycle to optimize efficiency, visibility, and data analytics.

☐ No

☐ Somewhat

☐ Yes

4.5) We have a risk management framework in place that balances cost savings with supply risk (e.g., geographic concentration, reliance on key suppliers, etc.).

☐ No

☐ Somewhat

☐ Yes

SECTION TOTAL:

5.0 FINANCE

5.1) Finance is seen as a key business partner that effectively supports business processes and provides meaningful business analysis.

☐ No

☐ Somewhat

☐ Yes

5.2) Our budget processes are value-added, helping leaders optimally allocate resources, establish targets, and set stakeholder expectations.

☐ No

☐ Somewhat

☐ Yes

5.3) Final financial results and analyses are provided within five workdays of month-end; key financial processes (AR, AP, fixed assets, intercompany, etc.) are efficient, supported by leading technology, and do not create bottlenecks for other processes.

☐ No

☐ Somewhat

☐ Yes

5.4) Our financial results are presented in a consistent format that is understood across the business and used for decision-making.

☐ No

☐ Somewhat

☐ Yes

5.5) We have defined processes in place to ensure working capital, cashflow, and liquidity are properly managed.

☐ No

☐ Somewhat

☐ Yes

SECTION TOTAL:

6.0 TECHNOLOGY

6.1) We have an overall systems strategy and blueprint that guides technology decisions.

☐ **No**

☐ **Somewhat**

☐ **Yes**

6.2) Each key set of master data has a defined owner and steward; governance policies for master data are well-documented and enforced.

☐ **No**

☐ **Somewhat**

☐ **Yes**

6.3) Our business processes benchmark well in terms of automation percentage, cycle time, cost, and error rates.

☐ **No**

☐ **Somewhat**

☐ **Yes**

6.4) Reporting and analytics are timely and insightful for leadership; data is presented visually and with the proper context to enable fast interpretation.

☐ **No**

☐ **Somewhat**

☐ **Yes**

6.5) Our leaders thoroughly understand how emerging technologies (AI, autonomous robotics, computer vision, quantum computing, digital twins, synthetic data, APIs, edge computing, AR/VR, etc.) will impact our industry.

☐ **No**

☐ **Somewhat**

☐ **Yes**

SECTION TOTAL:

7.0 ORGANIZATION & PEOPLE

7.1) We have effective, repeatable recruiting processes that deliver resources with the right skillsets to the business.

☐ No

☐ Somewhat

☐ Yes

7.2) Each role is well-defined and our organizational structure streamlines execution and aligns with how work gets done.

☐ No

☐ Somewhat

☐ Yes

7.3) Our performance management processes are effective at developing talent and addressing underperformers across all levels; employees understand performance expectations and the measures used to judge their performance.

☐ No

☐ Somewhat

☐ Yes

7.4) Our leadership successfully cultivates a corporate culture that drives cohesion and fuels long-term competitive advantage.

☐ No

☐ Somewhat

☐ Yes

7.5) Our executive leadership views mentoring and succession planning as an ongoing process and an important part of their role.

☐ No

☐ Somewhat

☐ Yes

SECTION TOTAL: