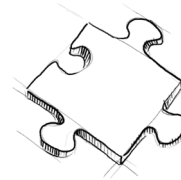


Puzzle Piece One

Intentional Purpose

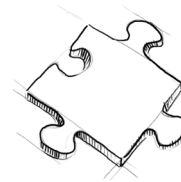


Intentional Purpose Checklist

- Describe your company's values. List 4 to 8.
- Describe your company's mission: We exist to do X (what), we do it for Y (who), and we do it by Z (how).
- Describe your company's vision: A year from now we will be X.
- Describe how you will communicate this.
- List everyone you will tell about your Intentional Purpose.
- Describe how will you communicate your Intentional Purpose to everyone you have listed.
- Describe how you will live your Intentional Purpose.

Puzzle Piece Two

Intentional Culture

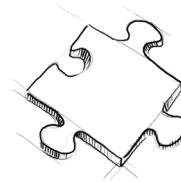


Intentional Culture Checklist

- Describe your Intentional Culture in three words.
- List at least three ways you'll communicate this to your employees.
- List at least three ways you'll communicate this to your customers.
- List the ongoing programs you have to reinforce the culture you've created. Do any of these need to be retooled or retired?
- Brainstorm several new ways to reinforce your culture.

Puzzle Piece Three

The CEO's Role

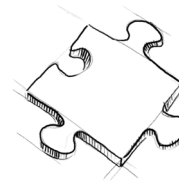


CEO Checklist

- Describe three times you've been in a leadership role.
- Identify what you did well or what worked for you in each role.
- Identify what didn't work well and what you would do differently.
- Identify your core strengths (if you're having trouble with this, ask a colleague, friend, or your partner what they think).
- Put a star next to the core strength that is most important for your company.
- Describe your one-year vision. (Another way to think about this is, what needs to happen in the next year?)
- List the skills you need on your team.
- Looking at those skills, list the positions you'll need on your team in order to fulfill your one-year vision (write the title and whether it's a long- or short-term position)?
- Name the people already in your company who have those skills and fit your culture for each of these positions. (If that person doesn't already work for your company, make a note to fill the position and be sure to read Chapter Four on hiring.)
- List the things you're doing to grow your people.
- List the things you're doing to grow your company.

Puzzle Piece Four

Hiring



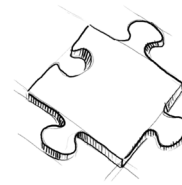
Hiring Checklist

- List the positions you need to fill to make your one-year vision happen.
- Using the models earlier in this chapter write a brief job description for each position.
- For each position, list the required and desired skills and experience.
- For each position, list the required and desired behavioral traits.
- Conduct research on salary ranges for each position. Set a base salary that is at the top end of the range.
- Decide whether you will recruit using internal or external resources.
- Decide on your resume-ranking process.
- Choose a candidate prescreener.
- Compose three prescreening questions.
- Choose your interviewing team.
- Set three interview times and places.
- Write ten behavior-based interview questions.
- Decide on any additional questions you will need to ask.
- Decide on your candidate-ranking process.
- List any additional assessments you will require.
- Decide how you will verify work histories.
- Describe the on-boarding process for each position.
- Describe your short-term expectations and goals for each position.
- Describe how and when you will assess your hiring process.

Puzzle Piece Five

HR and Your

Employee Handbook



HR Checklist

- Decide whether you need an HR head or an HR team?
- If you need an HR head, decide who that will be.
- List the specific skills and experience this person brings to the position.
- List the duties your HR head will handle.
- If you need a team, list the members and what each will handle (be sure to match skills with duties).
- List the outside resources are you already using.
- List any additional outside resources you need to add.

Fostering Collaboration Checklist

- Identify the departments of your company that need to be able to work together.
- Put a star next to any that are currently having trouble collaborating.
- Identify what is preventing collaboration.
- List their mutual goals.
- Decide how will you reward collaboration and achievement of goals.
- Make a plan for what you will do when collaboration gets off track.

Celebrating Wins Checklist

- List the behaviors you want to reward or recognize.
- List the individual accomplishments you want to recognize.
- List the team accomplishments you want to recognize.
- Describe what kinds of rewards and incentives will be valuable to your employees.
- Decide how you will include families and significant others.

Company Handbook Checklist

1. Decide which resources you will use to create your employee handbook.
2. Decide who will review your handbook after it is written (be sure to choose someone who is qualified to assess it for adherence to current law, enforceability, as well as common sense).
3. Included Items Checklist:
 - A. Employment Practices
 - EEOC Statement
 - Harassment and Anti-Discrimination Statements
 - Statement of At Will status
 - Attendance and Tardiness Policies
 - Overtime and Work Schedule Policies
 - Substance Abuse and Workplace Violence Policies
 - Company Rules
 - Disciplinary Process and Terminations
 - B. Company Benefits
 - Holidays
 - Thanksgiving
 - Day after Thanksgiving
 - Christmas Eve
 - Christmas
 - New Year's Eve
 - New Year's Day
 - President's Day
 - MLK Day
 - Memorial Day

Fourth of July

Labor Day

Other benefits:

Vacation

Sick Time

PTO

Insurance

Auto

Reimbursements

401K/Retirement

EAP

C. Company Property and Privacy Policies

Internet

Computers

Voicemail

Email

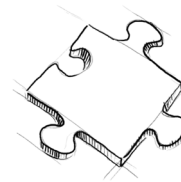
Texting

Property

Confidentiality Statement

Puzzle Piece Six

Marketing

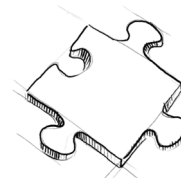


Marketing Checklist

- Describe what your company is really great at doing.
- Describe your customers.
- Describe why those people will buy your product or service.
- Pick your market position (First, Only, Best, or Most).
- Describe how are you making money doing this.
- Describe your Unique Selling Proposition.
- Complete your competitive market analysis.
- Who are your competitors?
- List each competitor's features and benefits.
- Make a grid to see where your company fits in with the competition.
- What changes might you make based on this analysis?
- List your goals for your product or service.
- Describe how you will you get your product to market.
- List your immediate marketing needs.
- List the partners who will help you address your needs and goals.
- Decide on a realistic marketing budget and prioritize your needs and goals accordingly.
- Decide on your timeline for accomplishing your marketing goals.

Puzzle Piece Seven

Sales



Sales Strategy Checklist

- Describe your customers.
- Describe how you sell your product or service (in person, on the phone, retail, e-commerce, etc.).
- List any changes you need to make in how you sell your product or service.
- Describe who sells your product or service (inside, outside, independent reps.).
- List any changes you need to make in who sells your product or service.
- Describe how your sales people are compensated.
- List any changes you need to make to how your salespeople are compensated.
- Describe your sales structure.
- Describe/list your sales team.
- List any changes you need to make to your sales structure or sales team.
- Describe your territorial strategy (national, regional, international).
- Develop the following sales tools:
 - Elevator pitch
 - Phone script
 - Gatekeeper phone script
 - Standard objections and response
 - In person sales presentation

- List trainings you are currently providing to keep your sales team sharp.
- List any trainings you need/would like to add.
- Describe your sales goals.
- Describe/develop your sales process.

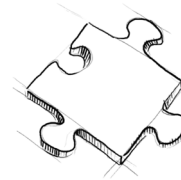
Pricing Strategy Checklist

- Identify where you are on the pricing scale compared to your competitors.
- Are your competitors raising prices? How often? How much?
- Are you at or near the maximum amount people will pay for this product or service?
- How many of your customers will go away if you increase your prices?
- Have your operating costs gone up?
- Decide how often you will increase prices and by how much.
- Decide how you will keep your customers informed in advance about price increases.

Customer Ranking Checklist

- Describe five to ten qualities that define a good customer for your company.
- Identify which of these a customer must have to earn an A grade (put a star next to non-negotiables).
- Identify which of these a customer must have to earn a B.
- Identify which of these a customer must have to earn a C.
- List your customers and grade them.
- Identify what you can do to keep your A customers happy.
- Identify what you can do to turn your B customers into A customers.

Puzzle Piece Eight Financial Metrics

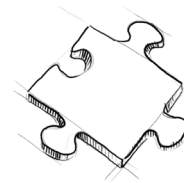


Financial Dashboard Checklist

- Identify the five to six most important Key Financial Indicators for your company.
- Decide which metrics you will track on your twelve month trailing charts.
- Identify the most important Key Performance Indicators for your company.
- Decide what your budgeting process will be.
- Describe how you will make sure your executive team understands the Dashboard for the company.
- List where you think you might be vulnerable to fraud.
- Decide what you will change to safeguard against fraud.
- Decide what financing methods you will employ.

Puzzle Piece Nine

Strategy + Operations = Execution

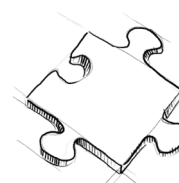


Strategic Initiatives Checklist

- List the three initiatives you must accomplish in the next six months.
- Describe how they support your vision.
- Describe the strategic objectives they support.
- List your goals for each initiative.
- List the actions/tactics necessary to complete each goal.
- List the members of your Operations Team.
- List the interested parties.
- Develop a communication plan.
- Select an outside facilitator for the strategic planning session.
- Debrief after the each initiative has been achieved.

Puzzle Piece Ten

Exit Strategy



Exit Strategy Checklist

- Set the date when you want to be done working.
- Describe what you would be doing if you didn't have your business.
- Determine your number: ascertain how much you want in the bank after the sale.
- Current Assessment of Business Value:
 - Who did/will do the assessment?
 - What type of valuation was/will be done?
 - Date of valuation:
 - Amount assessed:
- Current S.W.O.T.:
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats
- List type of exit option in order preference (Sale to outside, family, ESOP or IPO).
- List potential suitors

- List transition team:
 - Accountant
 - Attorney
 - Board Members/Advisors
 - Mentor
 - Insurance Analyst
 - Broker/Investment Analyst
 - Banker
 - Other
- Construct Business Plan B Notebook

Putting Together the Entrepreneurial Puzzle

The Ten Pieces Every Business Needs to Succeed

by Mary E. Marshall

The US has a long history of independent thinking, innovation, and creativity—a culture that is evident in an economy largely driven by small businesses and entrepreneurs. Yet, only about half of new businesses survive five years. Lack of practical knowledge about the basics of running a successful business is key. While entrepreneurs often have a dream for a service or product, many lack a comprehensive picture of what it takes to run a business. Given the precarious state of the economy and the significance of small business success, it's as important as it's ever been to support entrepreneurs in developing their practical business knowledge.

Over the course of a career working and consulting with entrepreneurs, Ms. Marshall has compiled a list of the ten most common problems that hamper small business success. *Putting Together the Entrepreneurial Puzzle* is comprised of ten interconnected but freestanding chapters addressing the fundamental areas of business every successful entrepreneur must be prepared to develop and manage. Each chapter takes a nuts-and-bolts approach and includes practical tools for building a successful business or correcting a struggling one:

- Real-life examples from Ms. Marshall's many years working with real entrepreneurs.
- Additional reading resources to increase breadth and depth of knowledge in specific areas.
- Sample worksheets, scripts, interview questions, etc.
- Checklists to help busy CEOs keep track of and accomplish tasks set out in each chapter.

Whether as a gift or a course text, *Putting Together the Entrepreneurial Puzzle* is a must-have reference for entrepreneurs at all stages of growing their businesses.

Available now from Amazon.com in print and Kindle formats.

Find out more about Mary Marshall's services
and follow her blog on leadership development and entrepreneurship:
www.mary-marshall.com.