



**Entrepreneur
Fund**

Financing for Business

**Greenstone
Group**

Support for the Entrepreneur

Assessment Tool
December 16, 2011

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

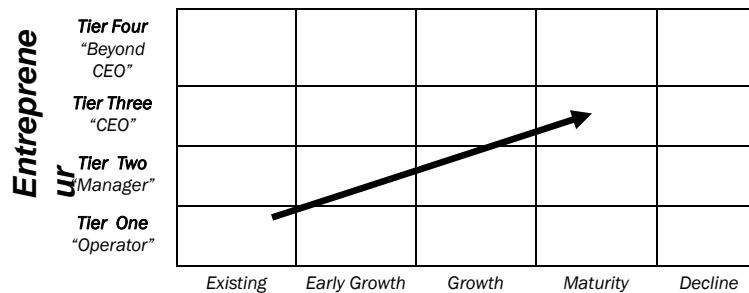
Tools

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



Customer Segmentation

• CEO Tier Level



Stage of Business



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

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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

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Skill Assessment

- Five categories
 - Management
 - Finance
 - Sales
 - Marketing
 - Product Development
- 2 layers of Questions
 - Knowledge
 - How do you use it

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Skill Assessment

- Five categories
 - Management
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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

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Skill Assessment

- Scores graphed with highs and lows
- Strengths and weaknesses
- Individual
- Interview
- Coach
- Annual Self Evaluation

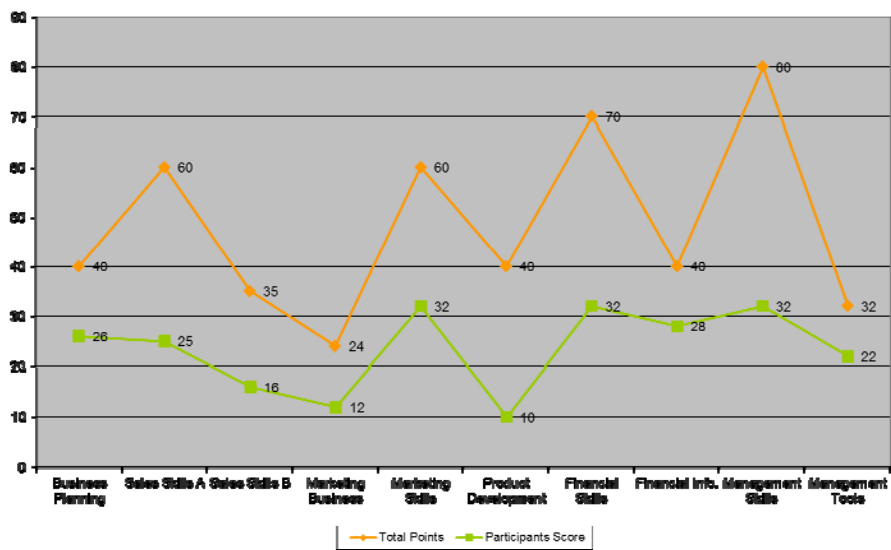
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	Skills Assessment Questions	Total Score	
1	Name & info.	0	X
2	Date of assessment	0	
3	Business Planning	40	26
4	Sales Skills A	60	25
5	Sales Skills B	35	16
6	Marketing Business	24	12
7	Marketing Skills	60	32
8	Product Development	40	10
9	Financial Skills	70	32
10	Financial Info.	40	28
11	Management Skills	80	32
12	Management Tools	32	22
	Total Score	481	235

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Skills Assessment - Entrepreneur X



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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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