

# Corporate Performance Checklist



For many growing technology companies running the business day-to-day often doesn't allow enough time, resources, or expertise for corporate planning and the myriad of information and materials needed to achieve the next growth phase.

We developed this checklist for your private use to help you rate your current level of satisfaction in the following corporate areas. The checklist is based on a scale of 1-5, with 5 being completely satisfied.

- 1** Not at all satisfied
- 2** Slightly
- 3** Moderately
- 4** Very
- 5** Completely satisfied

Area	Satisfaction Level				
Go-to-market strategy (e.g. product fit, pricing, market sizing, promotion, competition, resourcing, and more).	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Current financial planning/models predictably forecast current and future years performance (e.g. revenues, margins, expenses, EBITDA, cash flows, & personnel requirements).	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
KPIs/internal reporting tools provide insights needed to improve the business and compare to industry standards.	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Commission plans motivate performance, retain top performers, and align with company goals.	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Time and resources to research/implement a bonus, stock option, or employee share purchase plan.	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Time and resources to assess and prepare for an external investment or financing.	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Time and resources to plan and prepare documentation for a sale and/or exit of the business.	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Time, resources, and awareness of due diligence and documentation required by an investor, financier, or acquirer (e.g. corporate structure, tax, historical and projected financials, product/source code compliance, marketing/sales, personnel, and more)	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>