

Corporate Performance Checklist

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

We developed the checklist below 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)	1 2 3 4 5
Current financial planning/models predictably forecast current and future years performance (e.g. revenues, margins, expenses, EBITDA, cash flows, & personnel requirements)	1 2 3 4 5
KPIs and internal reporting tools provide the insights needed to improve the business and compare to industry standards	1 2 3 4 5
Commission plans motivate performance, retain top performers, and align with company goals	1 2 3 4 5
Time and resources to research/implement a bonus, stock option, or employee share purchase plan	1 2 3 4 5
Time and resources to assess/prepare for an external investment or financing	1 2 3 4 5
Time and resources to plan and prepare documentation for a sale and/or exit of the business	1 2 3 4 5
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)	1 2 3 4 5