

Attract – Culture – Efficiency (ACE): Evaluation Form

Date: _____

Name: _____

Goals (The ONE Thing – Keller & Papasan)	Current Score	Priority
10(+) Year Family Goal		10
10(+) Year Health Goal		10
10(+) Year Spiritual Goal		10

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| <p>1) Provide a “Priority” score (1 to 10 scoring: 1 = low priority, 10 = high priority)
 <u>Priority Score</u>: How important the specific criteria are to your organization</p> |
| <p>2) Provide a “Current Ability” score (1 to 10 scoring: 1 = Currently Low Ability, 10 = Currently Excellent Ability)
 <u>Current Ability</u>: Your organization’s current ability to perform the specific criteria</p> |
| <p>3) Solve the criteria that get a High Priority Score and a lower Current Ability score</p> |

Balance	Current Score	Priority
Family (Spouse, Children, Your Circle, Vacations, Fun, Time Together...)		
Health (Activity Time, Diet/Weight, Preventative Doctor/Dental...)		
Spiritual (Spiritual Time, Philanthropy...)		

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Attract & Onboard Customers

Attract Clients	Current Score	Priority
A. Formalize “why” your organization exists (aka. Why Statement) and Tagline - Start with Why - Sinek		10
B. Degree to which your “Why” is prominent within & outside the Co.		10
C. Consistency of Name, Tagline, Logo, Colors, Meta-Tags, Social Media...		10
D. Intellectual Property Protected (©, ®, ™, patents, trade secrets...)		
E. Identify Target Market(s)-		
F. Client Onboarding Process Defined & Communicated		
G. Referral Strategy from Clients Formalized		
H. Customer Retention Strategy Defined		

Team Culture / Support / Engagement

Staff Engagement & Retention	Current Score	Priority
First Break All the Rules – Gallup (includes Clifton Strength Finder)		
A. Does each employee:		
1) Know what’s expected of them?		10
2) Have the materials, equipment, training to do what’s expected of them?		10
3) Have the opportunity to do what they do best (right person / right seat)		7
4) Receive recognition or praise in the last 7 days? One Minute Manager – Blanchard		7
5) Feel their supervisor cares about them as a person?		7
6) Feel someone encourages their development? (Training Plan...)		7
7) Feel their opinions at work count? (Consultation, Consensus...)		7
8) Feel the mission/purpose of the business and job is important? (Why Statement, tag line consistently communicated)		7
9) Have a best friend at work?		7
10) Had someone speak to them about their progress in the last 6 months?		7
11) Had the opportunity to learn and grow in the last year (hard/soft skills)?		7
12) Have compensation and benefits that are fair and competitive		7

Efficient Operations

Systems	Current Score	Priority
A. Exceptional Customer Service		
B. Efficient Dispatching & Dispatching Changes		
C. Safe, Timely, and Efficient Service Delivery		
D. Accurate Billing		
E. Management Reports with Key Measurements		
F. Effective Communication Internally & Externally		
G. Organization’s Bottleneck Identified		