

MANAGEMENT SELF-ASSESSMENT

For: Acme Widget Company
 By: Self
 When: 4-Jun-18

Rating key
 X Not critical this year
 E Excellent
 A Adequate
 N Needs attention
 HML High, Medium, Low priority

This checklist will help prioritize among the many practices that might need attention. See www.theindex.net / The CMTP Index for definitions and discussion.

0 DISCIPLINE
 0.0 Practice area
 0.0.0 Practice

Last rating
 Current rating
 Priority

				Comment/Question/Project 1	Comment/Question/Project 2	Comment/Question/Project 3
1	STRUCTURE					
1.1	Ethics and the law					
1.2	Market position					
1.3	Ownership structure					
1.5	Governance					
1.5	Planning					
1.6	Facilities					
2	MARKETING & SALES					
2.1	Market research					
2.2	Channels of distribution					
2.2.1	Retailing					
2.2.2	Franchising					
2.2.3	E-commerce					
2.2.4	Catalog sales					
2.2.5	Wholesaling					
2.3	Pricing					
2.3.1	Pricing terms					
2.3.2	Fee structure					
2.3.3	Discounts					
2.3.4	Promotions					
2.4	Marketing communications					
2.5	Sales management			SAMPLE		
2.5.1	Selling	A	E	H	Training in Table of Priorities	See Market Research
2.5.2	Negotiations	A	A	M	See Pricing grid	Rework standard contract
2.5.3	Sales pipeline	A	N	H	Use new CRM for pipeline reporting	Increase unprompted inquiries by 20%
2.5.4	Sales territories	N	X			
2.5.5	Sales compensation	A	N	M	Consolidate to 3-tier system	Create cross-selling incentives
2.6	Customer service					Link to 80/20 results
3	OPERATIONS					
3.1	Quality					
3.2	Work process					
3.3	Production technology					
3.4	Supply chain					
3.5	Logistics					
3.6	Inventory					
4	INFORMATION					
4.1	Applications					
4.2	Internet					
4.3	Data and reporting				SAMPLE	
4.3.1	Database design	E	A	M	Begin with report calendar, below	Prepare for robotics
4.3.2	Database integration	A	A	M	Link CRM with ERP	Develop in-house data management expertise
4.3.3	Reporting	N	A	H	Create report calendar	Reduce no. reports by 50%
4.3.4	Information security	E	E	L	No significant changes needed	Re-examine mid-year
4.4	Research and analysis					
4.5	Communication System					
4.6	Information Technology					
5	HUMAN RESOURCES					
5.1	Management					
5.2	Organizational Structure					
5.3	Employee Relations					
5.4	Training and Development					
5.5	Compensation					
5.6	Recruitment and Retention					
6	FINANCE					
6.1	Financial accounting					
6.2	Managerial accounting				SAMPLE	
6.2.1	Financial analysis	N	A	H	See report calendar	Emphasize cost accounting
6.2.3	Business valuation	N	N	M	Must have by 2QTR for succession planning	Run Management Self-Assessment
6.2.4	Financial literacy	N	A	M	Incorporate into orientation for staff and board	Balance with long-term quality goals
6.3	Budgeting and forecasting					
6.4	Financing					
6.5	Cash management					
6.6	Risk management					