



Practicing Professionals and Executives: The Vision Advocate Scorecard™

The Vision Advocate Scorecard™ helps you clearly understand your current situation. Rate your reaction to each pair of phrases on a scale from 1 to 10. A 1 means the phrase on the left is a better description of your situation; 10 indicates that the right hand phrase is better. Add up the total in each column and discuss with your advisor.

		1	2	3	4	5	6	7	8	9	10	
1	We do not have a written strategic business plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We have a written strategic business plan and communicated it with our employees
2	We do not have all our business agreements executed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We have executed documents and agreements that are relevant and sustainable to our future
3	We do not have a written disaster plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We have a written disaster plan and conduct mock drills
4	We have not identified key employees and provided a compensation package for retention, attraction and future company value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We have identified key employees and implemented a compensation package for retention, attraction and future company values
5	We do not review financials monthly at the board level with our CPA and key employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We review financials monthly at the board level with our CPA and key employees
6	We do not have a Board of Directors that includes outside directors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We have an active Board of Directors that includes outside directors
7	We do not review our performance standards and written goals monthly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We review our performance standards and goals monthly with accountability
8	Our financial advisors do not meet regularly and work together to leverage our growth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Our financial advisors meet regularly and work together to leverage our growth
9	We do not have a written business continuity and succession plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We have a written business continuity and succession plan
10	We do not have as much confidence in our future vision, mission and goals as we would like	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	We feel confident about our future and have the clarity to make wise choices each day
ADD COLUMN TOTALS →												← YOUR SCORE



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