



# For Business Owners: The Owner's Advantage Scorecard™

The Owner's Advantage 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 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  |
| 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 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                          |
| 4   | 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   |
| 5   | 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   |
| 6   | 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   |
| 7   | 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   |
| 8   | We do not review our performance standards and written goals monthly and lack accountability                                | <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  |
| 9   | 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  |
| 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, have the clarity to make wise choices each day, and have reviewed the tools which may help us achieve our vision |
| <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="background-color: #004a7c; color: white; padding: 5px; border-radius: 5px;">ADD COLUMN TOTALS</div> <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div> <div style="background-color: #004a7c; color: white; padding: 5px; border-radius: 5px;">YOUR SCORE</div> </div> |   |                          |                          |                          |                          |                          |                          |                          |                          |                          |                          |  |



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