



Bertology©

Welcome to Bert's questionnaire. He has put together some smart statements which will get to the heart of your business issues. All you have to do is answer them honestly. Once they have been completed, entered on the website and you have given us your contact details, you will receive Bert's analysis. You are then well on your way to finding new opportunities to save money, make more money and have some fun.

Strategic Importance

At the start of each section (e.g. "Defining Success") you are asked to score the level of importance of this section, both now and in the future, to your business. Bert calls this the "Strategic Importance" score, where

1 means "Not important", 3 means "Important" and 5 means "Essential"

Statements

In each section there are a number of statements. For each statement we ask you to score how well this statement applies to your business. Bert calls this the "Statements" score.

1 means "No, not at all", 3 means "Sometimes" and 5 means "Yes, always"

You can use the 2 and 4 scores to hedge your bets!

Once you are happy with your answers enter them into Bert's section on Targeted Solutions' website: www.targetsl.com

And that's all there is to it!

Report

Once Bert has your answers he will prepare a report for you to read online.

Remember: "A journey of a thousand miles must begin with a single step" *Chinese proverb*

1 Defining Success Strategic Importance 1,2,3,4 or 5 <input style="float: right;" type="text"/>	Statement Score 1,2,3,4 or 5
1. Vision, mission and goals are clearly communicated and understood by employees	<input type="text"/>
2. The values of the company (the way things get done) are shared by all employees	<input type="text"/>
3. All employees understand their roles and what value they add in meeting the business goals	<input type="text"/>
4. Everyone knows what success looks like and this is reflected in their performance goals, measures and incentives	<input type="text"/>
5. Customer satisfaction is at the heart of the business	<input type="text"/>
2 Planning Processes Strategic Importance 1,2,3,4 or 5 <input style="float: right;" type="text"/>	Statement Score 1,2,3,4 or 5
1. There is a clear documented long term strategy for the business	<input type="text"/>
2. Promotional planning meetings are conducted three or four times a year and there are clear processes for staff input at both a strategic and tactical level	<input type="text"/>
3. Decision making and feedback is swift, clear and transparent	<input type="text"/>
4. Planning takes into account all key aspects... customers, consumers competitors, cash	<input type="text"/>
5. Return on Investment is the prime consideration when making resource allocation decisions	<input type="text"/>
3 Communication Strategic Importance 1,2,3,4 or 5 <input style="float: right;" type="text"/>	Statement Score 1,2,3,4 or 5
1. There is a clearly defined process for communications to staff that minimises overload and ensures consistency, continuity, and simplicity of messages	<input type="text"/>
2. There is an established system for performance appraisal, employee feedback and conflict resolution	<input type="text"/>
3. Customers are delighted with the style, speed and effectiveness of company communications	<input type="text"/>
4. Suppliers feel like valued partners of the business	<input type="text"/>
5. There is a healthy level of positive communication between employees	<input type="text"/>
4 Size, Structure and Roles Strategic Importance 1,2,3,4 or 5 <input style="float: right;" type="text"/>	Statement Score 1,2,3,4 or 5
1. Business staffing relative to key competitors is of the right size and skill mix to deliver against business plans	<input type="text"/>
2. The business structure is designed to provide a balance between customer focus and administration	<input type="text"/>
3. There is a balanced workload between staff	<input type="text"/>
4. A clear methodology is utilised for analysing necessary headcount in each business function	<input type="text"/>
5. Reporting structures have a sensible span of control	<input type="text"/>
6. There are clearly defined and published roles for each business position	<input type="text"/>
7. Staff and managers have clearly defined and published standards of performance	<input type="text"/>
8. Any management role is dominated by requirements to coach, develop, manage performance and lead staff	<input type="text"/>
9. Headquarter structure, staff and operational processes are designed to support and enable customer facing staff	<input type="text"/>

5 Preparation for the Future Strategic Importance 1,2,3,4 or 5 <input data-bbox="1007 80 1121 143" type="text"/>	Statement Score 1,2,3,4 or 5
1. A business excellence review has been conducted within the preceding 12 months and strengths, weaknesses, opportunities and threats are clearly defined and action plans developed	<input data-bbox="1270 159 1385 221" type="text"/>
2. Areas for improvement are prioritised and a clearly defined action plan with timelines and responsibilities has been developed	<input data-bbox="1270 235 1385 297" type="text"/>
3. There is a strategic plan designed to provide an analysis of existing and future head-count requirements based on current and future business potential	<input data-bbox="1270 311 1385 374" type="text"/>
4. There is a three-year business plan that specifies resource requirements, anticipates cash flow needs and has realistic maintenance/expansion opportunities	<input data-bbox="1270 387 1385 450" type="text"/>
5. There is sufficient time dedicated to planning to minimise unwelcome surprises	<input data-bbox="1270 463 1385 526" type="text"/>
6 Screening and Hiring Strategic Importance 1,2,3,4 or 5 <input data-bbox="1007 537 1121 600" type="text"/>	Statement Score 1,2,3,4 or 5
1. A recruiting process is well-established and utilises a referral network and all available technology (e.g. internet) to reach the widest possible array of candidates	<input data-bbox="1270 616 1385 678" type="text"/>
2. There is a validated hiring profile based upon experiences of high performing staff that has been developed to define minimal characteristics and requirements for employment	<input data-bbox="1270 692 1385 754" type="text"/>
3. The screening process utilises tests (e.g. self-assessment, personality, aptitude and intelligence) to filter out inappropriate applicants	<input data-bbox="1270 768 1385 831" type="text"/>
4. Interviewing specialists are utilised to screen applicants with targeted selection (competency and performance based) and minimise management time off the job	<input data-bbox="1270 844 1385 907" type="text"/>
5. Time to fill a vacant position from recruitment to start date is no more than eight weeks	<input data-bbox="1270 920 1385 983" type="text"/>
6. New hires standards are in place which are reviewed at 6 and 12 months with new employees to ensure viability	<input data-bbox="1270 996 1385 1059" type="text"/>
7. A list of preferred suppliers in terms of recruitment consultants/ specialists is in existence with negotiated rates and T&Cs of business	<input data-bbox="1270 1072 1385 1135" type="text"/>
7 Training and Development Strategic Importance 1,2,3,4 or 5 <input data-bbox="1007 1146 1121 1209" type="text"/>	Statement Score 1,2,3,4 or 5
1. Training requirements have been benchmarked against best in class competitors and there are published training requirements for new and existing staff	<input data-bbox="1270 1225 1385 1288" type="text"/>
2. Training is seen as an investment for the future and not a cost. Training is seen as vitally important for the development of people and the organisation, not as a "reward" for good performance	<input data-bbox="1270 1301 1385 1364" type="text"/>
3. Training interventions have measurable results	<input data-bbox="1270 1377 1385 1440" type="text"/>
4. Each member of staff has a discussion with management on career and training needs at least once per year. Employees are encouraged to identify and make known their own training and development needs	<input data-bbox="1270 1453 1385 1516" type="text"/>
5. Regular reviews are made to ensure that government training grants are investigated for business relevance	<input data-bbox="1270 1529 1385 1592" type="text"/>
8 Retention and Reward Strategic Importance 1,2,3,4 or 5 <input data-bbox="1007 1603 1121 1666" type="text"/>	Statement Score 1,2,3,4 or 5
1. Employees who are critical to the business have been identified and insurance/provision made for their absence	<input data-bbox="1270 1682 1385 1744" type="text"/>
2. Key employees are provided with specific incentives to stay with the business	<input data-bbox="1270 1758 1385 1821" type="text"/>
3. Rewards (pay, benefits, recognition) are benchmarked with local competition to ensure competitiveness. There is a system for providing motivational recognition to high performing staff	<input data-bbox="1270 1834 1385 1897" type="text"/>
4. Staff are paid correctly and on time. Staff believe that they are fairly rewarded for their effort	<input data-bbox="1270 1910 1385 1973" type="text"/>

9 Leadership, Coaching and Motivation Strategic Importance 1,2,3,4 or 5 <input style="float: right;" type="text"/>	Statement Score 1,2,3,4 or 5
1. Key management/leaders always behave and act in a consistent, respectful and professional manner	<input type="text"/>
2. The needs of your people coincide with the needs of the organisation	<input type="text"/>
3. Leaders foster a clear understanding of the company's overall business strategy and objectives, how each individual contributes to achieving these and sharing how the company is performing relative to the strategic business objectives	<input type="text"/>
4. Management are trusted and command respect and are readily available / accessible to their staff (an "open-door" policy exists across the company)	<input type="text"/>
5. Employees find their superiors fair and approachable and are comfortable giving upward feedback without fear of recrimination (ie. a "speak-up" culture exists)	<input type="text"/>
6. Management lead by example and freely provide coaching, feedback and support when required	<input type="text"/>
7. All employees are encouraged to find ways for the company to be more successful and are duly recognised and rewarded for their suggestions and contributions	<input type="text"/>
10 High Performance Team Working Strategic Importance 1,2,3,4 or 5 <input style="float: right;" type="text"/>	Statement Score 1,2,3,4 or 5
1. All goals, objectives, roles, responsibilities, processes, trust and relationships are clear and committed to by all team members	<input type="text"/>
2. Teams comprise of a distinct mix of complimentary talents, skills and personalities	<input type="text"/>
3. Team members are committed to communicating with, and supporting each other at all times. Free sharing of knowledge and experience exists within all teams enabling all members to have a sense of real value and belonging.	<input type="text"/>
4. A climate of trust exists, and is constantly built upon, within teams	<input type="text"/>
5. Creativity within the team is actively encouraged and rewarded	<input type="text"/>
6. Team and/or individual issues or conflicts are addressed and rectified immediately, thus maintaining the positive dynamics and motivation of the team	<input type="text"/>
7. Rapid, specific and accurate feedback is provided to team members about the effectiveness of their actions and decisions	<input type="text"/>
8. Team leaders ensure that the team operates synergistically and are responsible for regularly organising fun teambuilding exercises and events to reinforce this	<input type="text"/>
11 Performance Management Strategic Importance 1,2,3,4 or 5 <input style="float: right;" type="text"/>	Statement Score 1,2,3,4 or 5
1. Each member of staff has clear performance standards and objectives which are fairly applied	<input type="text"/>
2. Each member of staff has a formal performance appraisal at least once per year, at which there are no surprises ... both staff and management agree on the performance rating	<input type="text"/>
3. Over performing staff are rewarded and considered for career development	<input type="text"/>
4. Under performing staff are counselled and provided with an opportunity to improve	<input type="text"/>
5. Consistently low performers are managed out efficiently and within the legal framework	<input type="text"/>

12 Operational Planning and Project Management Strategic Importance 1,2,3,4 or 5 <input data-bbox="1008 80 1121 143" type="text"/>	Statement Score 1,2,3,4 or 5
1. There are clear and efficient methods for planning and executing work	<input data-bbox="1273 159 1382 221" type="text"/>
2. Peaks and troughs of workload are smoothed to ensure that projects are completed on time and to the right quality	<input data-bbox="1273 232 1382 295" type="text"/>
3. Attractive new business is never turned down through lack of capacity	<input data-bbox="1273 306 1382 369" type="text"/>
4. Customers satisfaction is ensured by under promising and over delivering	<input data-bbox="1273 380 1382 443" type="text"/>
5. Suppliers are seen as partners and always deliver on time	<input data-bbox="1273 454 1382 517" type="text"/>
6. Delivery targets are achieved at least 99% of the time	<input data-bbox="1273 528 1382 591" type="text"/>
13 Operational and Environmental Support Strategic Importance 1,2,3,4 or 5 <input data-bbox="1008 613 1121 676" type="text"/>	Statement Score 1,2,3,4 or 5
1. Staff always have the tools, materials, information etc. available to get the job done	<input data-bbox="1273 687 1382 750" type="text"/>
2. Wastage and pilfering are not a problem to the business	<input data-bbox="1273 761 1382 824" type="text"/>
3. Administration deals efficiently with bookings, contacts, telephone support, queries and general customer service	<input data-bbox="1273 835 1382 898" type="text"/>
4. The workplace environment is suitable for staff and risk assessments have taken place to ensure health and safety issues are addressed	<input data-bbox="1273 909 1382 972" type="text"/>
5. Maintenance of premises is well managed to ensure everything works as it should when required	<input data-bbox="1273 983 1382 1046" type="text"/>
14 Customers, Segmentation, Profiling and Targeting Strategic Importance 1,2,3,4 or 5 <input data-bbox="1008 1068 1121 1131" type="text"/>	Statement Score 1,2,3,4 or 5
1. The business knows the customer base very well	<input data-bbox="1273 1142 1382 1205" type="text"/>
2. Advertising and promotion is targeted to the right type of customer and gains good response rates	<input data-bbox="1273 1216 1382 1279" type="text"/>
3. New business is efficiently gained through existing customers and referrals	<input data-bbox="1273 1290 1382 1352" type="text"/>
4. Expansion into new areas is always properly researched	<input data-bbox="1273 1364 1382 1426" type="text"/>
5. There is a process for dealing with customer complaints which often turns complaints into further business	<input data-bbox="1273 1438 1382 1500" type="text"/>
6. The public perception of the business is positive and supported by appropriate and cost effective PR activities	<input data-bbox="1273 1512 1382 1574" type="text"/>

15 Money, Systems and Administration Strategic Importance 1,2,3,4 or 5	<input type="text"/>	Statement Score 1,2,3,4 or 5
1. The company is legally structured in the most efficient way for my business		<input type="text"/>
2. The business has satisfactory accounting systems. providing easily understandable management reports which support solid decision making		<input type="text"/>
3. There are successful systems in place to ensure that cash flow and tax situations are well managed and efficient		<input type="text"/>
4. The payroll system is up to date, efficient and legally compliant		<input type="text"/>
5. The legal contracts in place for employees, customers and suppliers are up to date, clear and comprehensive		<input type="text"/>
6. The insurances are adequate for the business risk profile		<input type="text"/>
7. Purchasing decisions are made to ensure the best possible value for the business		<input type="text"/>
8. Jobs are costed accurately to ensure a reasonable profit level is always obtained whilst providing competitive value for money for the customer		<input type="text"/>
16 Computing, Information Management and Analysis Strategic Importance 1,2,3,4 or 5	<input type="text"/>	Statement Score 1,2,3,4 or 5
1. The business has adequate IT support which provides effective and efficient support in servicing business, customer and supplier needs		<input type="text"/>
2. There is a sufficient back up system to ensure minimal risk to the business and confidential information is secure		<input type="text"/>
3. The software we use is the right type for the business		<input type="text"/>
4. Up to date analysis of information is at your fingertips		<input type="text"/>
5. IT personnel are able to communicate effectively and efficiently with their internal customers		<input type="text"/>