

Success ScoreCard [®]	Management & Leadership	Wellness	Finance	Sales & Marketing	Technology	Production
Definition	Directing and monitoring progress towards goal, define mission, values and purpose of organization, finding and engaging people to achieve goals.	Mental and Physical Health.	Measurement and monitoring of all things relating to money.	Developing a sustainable customer base for your product, the necessary branding and communications network.	Effective use of technology and information management basics.	Knowledge and organization necessary to efficiently create your product.
Competitive Advantage 5	Mission, values, purpose, and long-term goals in place and aligned; monitoring systems fully functional; vision of future defined and articulated; goals focused on proper metrics; employee training designed to reward and motivate toward advancement.	Stressors recognized and managed effectively; cognizant of factors inside and outside realm of control; techniques used to improve mental awareness and capabilities; systems in place for continuous learning; physical health managed effectively; work/family life in balance.	Balances, AR, AP, balance sheet, and budget vs actual reviewed daily; budget and plans adjusted monthly; long-term plans for capital purchases in place; sales forecasting accurate.	Excellent customer service; thorough knowledge of product and competitors; plan to fill sales funnel understood and implemented; sales forecasting accurate; products, target demographics, and company mission match; appropriate media and marketing message delivered to target demographic.	Able to choose appropriate software for all issues; able to set up complex spreadsheets; able to set up inventory, payroll, and new accounts with QuickBooks; able to use MS Project for project management.	Monitoring systems for safety, efficiency, and quality production in place; production costs known; factors that can/should be adjusted to maintain goals known.
Slight Advantage 4	Organization and delegation systems in place; mission, values, and goals identified but not integrated into daily routines; vision not apparent to outsiders; emphasis on hiring skilled employees appropriate to the job description.	No signs of depression or manic behavior; no productivity loss because of moods or mental state; training and learning is sporadic, as needed; minor health issues monitored and treated.	Basic budgeting and monitoring skills in place; accounting fundamentals understood; connections between assets, liabilities, income, expenses, and net worth understood.	USP well-articulated; appropriate media and marketing message delivered to target demographic; sales metrics identified and monitored.	Mastery of Word and PowerPoint; able to create Excel spreadsheets with formulas and charts; able to use QuickBooks for reporting and routine daily use.	Monitoring systems for key lines in place for cost control and quality control; scrap kept to minimum.
Neutral 3	Some company wide goals present; goals not shared internally; relationship between goals and mission not always present; small core of dedicated people (often related) sharing same mindset; training is on-the-job, rarely documented.	Minor to moderate health issues, being addressed; occasional anger or mood issues having minimal impact at home and work; training and seminars less than one per year.	AR, AP, P&L reviewed monthly; basic finance skills in place; accounts reconciled; prompt invoicing; accurate inventory; stable cash flow; limited but sufficient cash on hand.	Target demographic well-defined and understood; target demographic large enough to support current sales and growth; USP identified; sales basics implemented and followed through by sales force; Marketing and Sales work as a team.	Mastery of Word and PowerPoint, able to use Excel for data entry and basic sorting. Able to use QuickBooks for data entry.	Inventory planning linked with sales forecast; labor and work in process data captured electronically; limited use of reporting.
Limiting Factor to Growth 2	General direction of business known by some; goals at highest level of organization only; high employee turnover; no standard operating procedures; employees lack direction.	High stress levels affect performance at home and work; depression, or anxiety affect work performance; no training or workforce development; often feel sick but work through it.	Basic paper or electronic records; basic checkbook skills; records reviewed only at tax time; accounts not reconciled; no working cash on hand.	Message inconsistent; message delivered to wrong demographic; mass market advertising ineffective.	Basic use of Word; unable to use Excel or QuickBooks without assistance.	Limited data about labor, production, history captured on paper; limited electronic data.
Severe Limiting Factor 1	No clear goals; no monitoring systems for tracking progress; unsure of direction; ineffective time management interferes with project completion; people refuse to work for you.	Chronic depression, anxiety, alcoholism, drug abuse, or other untreated mental illness; major untreated issues with weight, BP, diabetes, heart.	No knowledge of current status; no electronic records.	Haphazard approach to contacting customers; poor customer service; wait for phone to ring; daily prayer: "If we build it, they will come."	Able to turn on computer; able to search the Internet.	Breakdowns cause lost production; inventory issues cause production delays; backorders common; no communication of production to customers; no production or labor data captured.