

THE PROFIT-MAKER CHECKLIST

How to identify your unique
competitive advantages...
and your potential dealbreakers

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INTRODUCTION

Tell me if this sounds familiar...

You founded your company on a great idea, a loyal and enthusiastic (and small) team, and lots of adrenaline. Your go-to business model has been “management by chaos.” Now you’re looking to grow and scale, and you need the backing of the RIGHT investor to make that happen.

But you’re also questioning yourself:

- Are we ready to grow or should we wait?
- What are the biggest red flags that might scare off an investor?
- What competitive advantages would make us more attractive to an investor?
- What does the right investor look like... and how will we know?
- How will we convince the right investor to invest in us?

Did you notice what all those questions have in common?

The answers ALL hinge on the quality of the people within your company—especially your leadership.

You see...

The biggest factor in the success or failure of your growth strategy is the capacity of your people to take your business to the next level.

Right now, you're probably thinking...

“

*That's true, but humans are unpredictable,
and therefore impossible to measure.*

”

If that's what you believe, no wonder you're feeling anxious, unclear, uncertain, skeptical and unenthusiastic about the prospect of growing and scaling your company. After all, the last thing you want to do is find an investor... only to squander their investment.

It's true: Your people, i.e. your human capital, are the biggest wildcard in your business. As the saying goes, we can't manage what we can't measure.

Here's the good news...

We CAN measure the human capital within your company.

And then we can **accelerate** it.

This checklist will enable you to identify the greatest competitive advantages hiding within your business... and the biggest red flags lurking beneath.

It will reduce your risk of scaling too soon or attracting the wrong investor, so you can feel confident, clear-headed, assured, trusting and excited about your growth strategy.

HOW THIS WORKS

Use this checklist to rate your company's CURRENT capabilities within each of the 11 core business dimensions that drive performance and profitability:

1. Personal
2. Employee Alignment
3. Personnel
4. Team Effectiveness
5. Leadership
6. Strategy & Planning
7. Customer Service
8. Sales & Marketing
9. Operations
10. Culture
11. Management

1. PERSONAL

How do individuals in your organization feel?

For example:

- Is their workload too heavy, too light, or just right?
- Do their skills align with their role?
- Do you have a plan for their development?
- Do they clearly understand their role?
- Does their work give them a sense of accomplishment?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



2. EMPLOYEE ALIGNMENT

Is everyone driving for results and profits?

For example:

- Do your training programs address job knowledge and skill gaps?
- Does every role have a clear definition of success?
- Are employees well matched to their roles?
- Do you recognize individual needs and concerns?
- Do employees have flexible career paths?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



3. PERSONNEL

How effectively do you lead people?

For example:

- Is employee turnover low?
- Does every employee have an accurate job description?
- Are performance reviews objective and valuable?
- Do employees have clear paths for advancement?
- Are the compensation and benefits plans competitive?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



4. TEAM EFFECTIVENESS

How strong are your teams?

For example:

- Do they consistently perform at a high level?
- Are they well balanced in talent and experience?
- Do they have sufficient autonomy to achieve results?
- Are team objectives clearly understood?
- Are individual expectations clearly communicated?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



5. LEADERSHIP

How trusted and inspiring are your leaders?

For example:

- Do employees trust in the leadership?
- Do the leaders delegate effectively?
- Are the leaders' actions and results consistent and effective?
- Do the leaders guide employees toward the right goals?
- Is the leadership agile and able to capitalize on new opportunities?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



6. STRATEGY & PLANNING

How comprehensive & secure is your strategy?

For example:

- Are KPIs used and measured frequently?
- Is your long-term vision clearly understood and communicated?
- Is the level of planning effective?
- Do you effectively assess and act on competitive threats?
- Is your overall strategy accurate and sound?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



7. CUSTOMER SERVICE

How loyal are your customers?

For example:

- Do you provide a high level of service?
- Do you exceed your customers' expectations?
- Do your internal departments cooperate well?
- Are customers loyal?
- Does every employee prioritize customer service?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



8. SALES & MARKETING

Does your pitch resonate, and do your people sell?

For example:

- Overall, do they do a good job of selling?
- Is your sales force effective?
- Is your sales management effective?
- How well do you understand your market?
- Is your marketing message clear, consistent and effective?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



9. OPERATIONS

Do you run efficient and quality operations?

For example:

- Are your operations effective and efficient?
- Is operations management competent and respected?
- Is quality a key area of focus?
- Do you have a solid quality improvement program?
- Do you measure and share quality and profitability results?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



10. CULTURE

How cohesive and beneficial is your culture?

For example:

- Are organizational values well defined and communicated?
- Is the working environment healthy, supportive and productive?
- Do most employees feel a strong sense of belonging?
- Does your company's culture support overall success?
- Is your workplace culture a competitive differentiator?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



11. MANAGEMENT

How effectively do you manage the business?

For example:

- Do managers receive consistent development?
- Are their clear lines of communication between managers and employees?
- Do managers receive effective skills training?
- Do employees respect their immediate supervisor?
- Do managers effectively gain commitment and motivate staff?

1

Poor



2

Below Average



3

Fair



4

Very Good



5

Excellent



BRINGING IT TOGETHER: LIABILITIES

Which areas are risk flags?

Write down your 2-3 lowest-scored dimensions (those you rated a 1 or 2):

DIMENSION	RATING

These risk flags are potential derailers that require immediate attention.

Are any of these areas **dealbreakers**? Then you're not ready to grow... let alone take on an investor.

BRINGING IT TOGETHER: ASSETS

Which areas are profit levers?

Write down your 2-3 highest-scored dimensions
(those you rated a 4 or 5):

DIMENSION	RATING

These are profit levers that you should reinforce and reward.

Are any of these areas **competitive advantages**? Highlight them in your pitch to a prospective investor.

WANT TO GO DEEPER?

This checklist just scratches the surface of how you can evaluate, leverage and accelerate your readiness to grow, scale and attract the right investor.

If you'd like to...

- ...go deeper on each dimension that drives performance and profitability...
- ...gain clarity on why and how you want to grow and scale...
- ...and attract the right investor with more confidence and less risk...

APPLY FOR A FREE

GROWTH READINESS ASSESSMENT HERE.



CLAIRE CHANDLER is founder of Talent Boost and a 20-year veteran of corporate America. She specializes in leadership and business value creation, helping investors fund and fuel the right businesses with more confidence and less risk.

One client sums up Claire perfectly:

“*Claire is always calm in a crisis, always finds creative ways to solve problems, and is always professional—but only when it’s necessary.*”

Claire has appeared on over 100 podcasts, authored several books on strategic leadership, and counseled hundreds of business leaders on how to measure and leverage human capital to make better business decisions and accelerate value creation.