



6 Steps to Massive Results

Business Assessment | ABOS: ActionCOACH Business Operating System

26 areas. 10 statements each. One score out of 260 that shows where your business relies on you.

BUSINESS ASSESSMENT SCORE

_____/260
That is _____ % (score ÷ 260 × 100)

HOW TO SCORE

- 1 Work through all 26 areas across the 6 Steps.
- 2 Tick each statement that is true today. Each tick is worth 1 point.
- 3 Every area has exactly 10 statements, so every area scores out of 10.
- 4 Add up each step for your step total, then add the 6 step totals for your score out of 260.
- 5 Circle your lowest step. That is where we start.

Be honest. This assessment is for you.

Score what is true today, not what is planned. A statement only counts when it is in place and working.

YOUR SCORE SUMMARY

STEP	AREAS	MAX	YOUR SCORE
1 Mastery	4	40	_____
2 Sales & Marketing	6	60	_____
3 Leverage	4	40	_____
4 Team	4	40	_____
5 Scale: 5 Disciplines	5	50	_____
6 Results	3	30	_____
TOTAL	26	260	_____

Check: 4 + 6 + 4 + 4 + 5 + 3 = 26 areas. 26 areas × 10 points = 260.

My lowest step: _____

THE 6 STEPS

1. Mastery

Your destination, your time, your delivery and your financial control.

2. Sales & Marketing

USP & guarantee, leads, conversion, average sale, transactions and margin.

3. Leverage

People, delivery, test & measure, and systems that do the work.

4. Team

The right people, the right environment, and a business that works without you.

5. Scale: 5 Disciplines

The 5 Disciplines: strategy, growth, capacity, consistency and meaning.

6. Results

Investments, growth, and a business that runs without you.

YOUR NEXT STEP

The 2-Week Business Performance Trial

Complimentary. A Business Performance Coach takes your lowest step and turns it into a plan you understand within 2 weeks. Then we recommend the right program together.

Book your trial: call 778-653-9911

avidactioncoach.com/2-week-business-performance-trial

Surrey HQ: 18669 52nd Avenue, Unit 108 | Kamloops: 1330B McGill Road

Business Performance Coaches | ABOS certified | ActionCOACH certified

1

STEP 1 MASTERY

STEP TOTAL
___ / 40

DESTINATION

- ☐ Vision, mission & culture defined
- ☐ Written business plan, followed
- ☐ Planning: 5, 3 & 1 year
- ☐ 90-day action plan in place
- ☐ Clear written goals
- ☐ Plan builds a saleable asset
- ☐ Business value known today
- ☐ Direction reviewed quarterly
- ☐ Goals shared with the team
- ☐ Personal & business goals linked

___ /10

WHAT IMPROVES THAT SCORE? _____

TIME

- ☐ Working ON vs IN the business
- ☐ Default diary: owner & team
- ☐ Time log reviewed regularly
- ☐ Daily To-Do & Not-To-Do lists
- ☐ Time leveraged through planning
- ☐ Frog / goal sheets used
- ☐ Delegation systems in place
- ☐ Time audited against priorities
- ☐ Weekly planning session held
- ☐ Owner protects time off

___ /10

WHAT IMPROVES THAT SCORE? _____

DELIVERY

- ☐ Regular customer contact
- ☐ Systemised for consistency
- ☐ Clear written delivery process
- ☐ Feedback, ratings & reviews collected
- ☐ Top customers (20/80 rule) known
- ☐ Self-critique of processes
- ☐ Customer experience mapped
- ☐ Delivery standards documented
- ☐ Complaints resolved & tracked
- ☐ Quality checked before handover

___ /10

WHAT IMPROVES THAT SCORE? _____

FINANCIAL

- ☐ Monthly P&L reviewed
- ☐ Balance sheet & cash flow tracked
- ☐ Breakeven known: year, month, day
- ☐ Debtors / creditors system in place
- ☐ Most profitable activity identified
- ☐ KPI dashboards active
- ☐ Pricing / cost reviews completed
- ☐ Financial reports shared with team
- ☐ Cash flow forecast kept current
- ☐ Budget set & reviewed to actuals

___ /10

WHAT IMPROVES THAT SCORE? _____

2

STEP 2 SALES & MARKETING

STEP TOTAL
___ / 60

USP & GUARANTEE

- ☐ USP written & clear
- ☐ Strong written guarantee
- ☐ Both used in all marketing
- ☐ Differentiated from competitors
- ☐ USP tested with real prospects
- ☐ Guarantee reduces buying risk
- ☐ Team can explain the USP
- ☐ Ideal client clearly defined
- ☐ Proof & testimonials collected
- ☐ USP reviewed every year

___ /10

WHAT IMPROVES THAT SCORE? _____

LEADS

- ☐ Written marketing plan active
- ☐ Targets & KPIs tracked
- ☐ Accurate literature & website
- ☐ Analytics reviewed regularly
- ☐ Follow-up process & scripts
- ☐ Database accurate & current
- ☐ Lead generation strategy active
- ☐ Lead source tracked & measured
- ☐ Cost per lead known
- ☐ Referral system in place

___ /10

WHAT IMPROVES THAT SCORE? _____

CONVERSION RATE %

- ☐ Rate tracked & benchmarked
- ☐ Everyone has conversion KPIs
- ☐ Test & measure every touchpoint
- ☐ Scripts trained consistently
- ☐ Follow-up process in place
- ☐ Lost leads reviewed monthly
- ☐ Sales process written down
- ☐ Proposals followed up on time
- ☐ Objections handled with scripts
- ☐ Win / loss reasons recorded

___ /10

WHAT IMPROVES THAT SCORE? _____

AVERAGE \$ SALE

- ☐ Average sale amount tracked
- ☐ Prices reviewed for increase
- ☐ Up-selling active at every sale
- ☐ Cross-selling systemised
- ☐ Checklist used at point of sale
- ☐ Value-added premium services
- ☐ Bundles / packages offered
- ☐ Minimum order or job size set
- ☐ Team trained to add value
- ☐ Average sale targets set

___ /10

WHAT IMPROVES THAT SCORE? _____

NO. OF TRANSACTIONS

- ☐ VIP / loyalty program active
- ☐ Recurring revenue / contracts
- ☐ Purchase frequency tracked
- ☐ Reminder system in place
- ☐ Trends monitored regularly
- ☐ Lapsed customers reactivated
- ☐ Regular client communication
- ☐ Client events or offers run
- ☐ Retention rate tracked
- ☐ Client reviews held

___ /10

WHAT IMPROVES THAT SCORE? _____

MARGIN %

- ☐ Gross margin % known
- ☐ Net margin % known
- ☐ Margin by product / service known
- ☐ Price reviews incl. suppliers
- ☐ Effects of discounting understood
- ☐ Price increases modelled first
- ☐ Costs reviewed quarterly
- ☐ Waste & rework measured
- ☐ Margin targets set
- ☐ Margins reviewed monthly

___ /10

WHAT IMPROVES THAT SCORE? _____

YOUR NUMBERS: HOW THEY MULTIPLY

Leads	×	Conversion rate %	=	Customers	_____
Customers	×	No. of transactions	=	Transactions	_____
Transactions	×	Average \$ sale	=	Revenue	_____
Revenue	×	Margin %	=	Profit	_____

Profit = leads × conversion × transactions × average sale × margin. Lift all five by 10% and profit grows by 61% (1.1 × 1.1 × 1.1 × 1.1 × 1.1 = 1.61). Write in your numbers to see the biggest gain.

3

STEP 3
LEVERAGE

STEP TOTAL
___ / 40

PEOPLE & EDUCATION

- ☐ Regular team training in place
- ☐ Appraisals with goals documented
- ☐ Productivity & service standards set
- ☐ Regular 1-2-1 sessions occurring
- ☐ Team events / welfare planned
- ☐ Culture of continued learning
- ☐ Individual development plans active
- ☐ Skills gaps identified & addressed
- ☐ Team performing to clear standards
- ☐ Training budget set

___ /10

WHAT IMPROVES THAT SCORE? _____

DELIVERY & DISTRIBUTION

- ☐ Delivery processes analysed
- ☐ Manuals & training docs current
- ☐ Consistent standards enforced
- ☐ The 'rules of the game' written
- ☐ Self-critique cycle in place
- ☐ Delivery measured for quality
- ☐ Customer feedback loop active
- ☐ Distribution reviewed for efficiency
- ☐ Delivery team trained to standard
- ☐ Capacity planned ahead of demand

___ /10

WHAT IMPROVES THAT SCORE? _____

ACCOUNTING / TEST & MEASURE

- ☐ KPIs reviewed daily & weekly
- ☐ Every team member has KPIs
- ☐ Test & measure culture embedded
- ☐ Regular performance reviews
- ☐ Monthly P&L reviewed by owner
- ☐ Breakeven tracked & communicated
- ☐ Cash position reviewed weekly
- ☐ Variances investigated promptly
- ☐ Financial trends understood
- ☐ Bookkeeping current every month

___ /10

WHAT IMPROVES THAT SCORE? _____

SYSTEMS & TECHNOLOGY

- ☐ 'How to' manuals documented
- ☐ Routine tasks automated
- ☐ Workflow charts documented
- ☐ 5S standards in the workplace
- ☐ CRM accurate & fully used
- ☐ Technology stack optimised
- ☐ Systems reviewed for efficiency
- ☐ Tech training completed by team
- ☐ Manual processes being removed
- ☐ Data backed up & secure

___ /10

WHAT IMPROVES THAT SCORE? _____

4

STEP 4
TEAM

STEP TOTAL
___ / 40

RECRUITMENT SYSTEMS

- ☐ Recruitment process documented
- ☐ Hire on attitude, train for skill
- ☐ Team retention rate tracked
- ☐ Right people on the bus
- ☐ Onboarding system in place
- ☐ Performance reviews completed
- ☐ Exit interviews conducted
- ☐ Talent pipeline being built
- ☐ Team structure matches strategy
- ☐ Every role has a position description

___ /10

WHAT IMPROVES THAT SCORE? _____

ENVIRONMENT

- ☐ Company culture written & lived
- ☐ Culture points clearly documented
- ☐ Proud of our physical environment
- ☐ Would YOU want to work here?
- ☐ Team welfare actively managed
- ☐ Environment reflects brand values
- ☐ Workspace supports productivity
- ☐ Team recognition program active
- ☐ Psychological safety present
- ☐ Team wins celebrated

___ /10

WHAT IMPROVES THAT SCORE? _____

6 KEYS TO A WINNING TEAM

- ☐ 1. Strong leadership
- ☐ 2. Common goal
- ☐ 3. Rules of the game
- ☐ 4. Action plan
- ☐ 5. Support risk-taking
- ☐ 6. 100% involvement & inclusion
- ☐ All 6 keys actively measured
- ☐ Team trained on the 6 keys
- ☐ Keys reviewed in team meetings
- ☐ Team rates the keys quarterly

___ /10

WHAT IMPROVES THAT SCORE? _____

BUSINESS WORKS WITHOUT YOU

- ☐ GM or successor in place
- ☐ GM currently in training
- ☐ Owner stepping back from ops
- ☐ Business runs without owner
- ☐ Key person risk reduced
- ☐ Processes not reliant on owner
- ☐ Owner working ON not IN
- ☐ Delegation fully embedded
- ☐ Owner can take 4 weeks off
- ☐ Target date set for freedom

___ /10

WHAT IMPROVES THAT SCORE? _____

NOTES: WHAT IMPROVES THOSE SCORES?

5

STEP 5
SCALE: 5
DISCIPLINES

STRATEGY (DIRECTION)

- ☐ 3-year vision documented
- ☐ 1-year objectives set
- ☐ Quarterly priorities defined
- ☐ Target market clearly identified
- ☐ Competitive advantage documented
- ☐ Business valuation target set
- ☐ Expansion opportunities mapped
- ☐ Key risks identified & reduced
- ☐ Strategic partnerships active
- ☐ Strategy reviewed with the team

___ / 10

WHAT IMPROVES THAT SCORE? _____

MISSION (MEANING)

- ☐ Purpose lived, not just posted
- ☐ Clients can state your difference
- ☐ Brand stands beyond the owner
- ☐ Values drive hiring decisions
- ☐ Values in all performance reviews
- ☐ Team rallies around the mission
- ☐ Recognition tied to values
- ☐ Community impact initiatives active
- ☐ Mission reviewed quarterly
- ☐ Every team member can state it

___ / 10

WHAT IMPROVES THAT SCORE? _____

BUSINESS DEVELOPMENT (GROWTH)

- ☐ Lead generation engine consistent
- ☐ Marketing plan driving scale
- ☐ CRM fully used across the team
- ☐ Referral program producing results
- ☐ Strategic alliance program active
- ☐ Multi-location revenue modelled
- ☐ Brand recognition growing
- ☐ Client retention plan active
- ☐ Monthly growth dashboard reviewed
- ☐ New offers tested every year

___ / 10

WHAT IMPROVES THAT SCORE? _____

PEOPLE (CAPACITY)

- ☐ GM running operations daily
- ☐ Team performing without owner
- ☐ Business coaching builds leaders
- ☐ Every role has KPIs at scale
- ☐ Leadership development plan active
- ☐ Performance reviews quarterly
- ☐ Succession plan for all key roles
- ☐ Culture & values reinforced
- ☐ Future org chart completed
- ☐ Hiring plan matches growth plan

___ / 10

WHAT IMPROVES THAT SCORE? _____

EXECUTION (CONSISTENCY)

- ☐ Core processes documented & followed
- ☐ SOP library maintained & current
- ☐ Weekly KPI dashboard reviewed
- ☐ Financial reporting monthly
- ☐ Cash flow forecast updated monthly
- ☐ Meeting rhythm established
- ☐ Quality standards documented
- ☐ Customer experience measured
- ☐ Automation reviewed quarterly
- ☐ 90-day plans completed on time

___ / 10

WHAT IMPROVES THAT SCORE? _____

YOUR SCORE BY STEP

1

Mastery

___ / 40

2

Sales & Marketing

___ / 60

3

Leverage

___ / 40

4

Team

___ / 40

5

Scale: 5 Disciplines

___ / 50

6

Results

___ / 30

TOTAL SCORE _____ / 260

STEP TOTAL
___ / 50

6

STEP 6
RESULTS

INVESTMENTS

- ☐ Passive income streams active
- ☐ Property / shares / bonds held
- ☐ Business equity value built
- ☐ Investment strategy documented
- ☐ Wealth creation plan in place
- ☐ Financial advisor engaged
- ☐ Personal net worth growing
- ☐ Profits taken out regularly
- ☐ Retirement plan funded
- ☐ Target date set

___ / 10

WHAT IMPROVES THAT SCORE? _____

GROWTH

- ☐ Additional outlets / locations open
- ☐ Other businesses operating
- ☐ Franchise potential explored
- ☐ Strategic partnerships generating
- ☐ New revenue streams active
- ☐ Scalable growth model proven
- ☐ Growth targets set & tracked
- ☐ Acquisitions reviewed
- ☐ Growth funded from profit
- ☐ Target date set

___ / 10

WHAT IMPROVES THAT SCORE? _____

BUSINESS RUNS WITHOUT YOU

- ☐ Business profitable without owner
- ☐ Revenue sustained in owner absence
- ☐ Leadership team runs day-to-day
- ☐ Exit or succession pathway clear
- ☐ Business value maximised
- ☐ Owner free from operations
- ☐ Legacy plan documented
- ☐ Ready for sale or handover
- ☐ Owner chooses their role
- ☐ Target date set

___ / 10

WHAT IMPROVES THAT SCORE? _____

COMMITMENT

For the next 90 days I will improve:

Otherwise I will:

Business Performance Coach: _____

Owner: _____

Date: _____