What to Expect With a Business Check-Up

What is a business check-up?

A business check-up is a complete assessment of your business. It takes the pulse of the critical aspects of your business to catch problems and spot opportunities that may be in your blind spots.

We review financials, strategy, culture, accountability, and the team's fit. From this assessment, we deliver 2-4 specific, written project plans that will accelerate results or deal with issues that are slowing business down.

What is the HFW Process?

We evaluate:

- Recent financials
- Current business strategy
- Your core business operations
- Your clients & sales process
- Details about your organizational culture
- Challenges you've been facing

To gather this data, we review relevant financial, strategic, and cultural documentation. In addition, we interview a sampling of staff, including but not limited to:

- Leaders and individual contributors
- All the different departments or teams
- New and longtime staff

Full assessments also include conversations with customers, key suppliers, and market research.

How long does the process take?

The process varies depending on your availability but typically takes **4 to 8 weeks**.

Who is this for?

- Purpose-driven small businesses between 10 and 100 people
- Leaders facing either difficulty in prioritization or challenges in creating different business outcomes
- Leaders who want to tap into the knowledge and ability of a greater set of their team

Why work with us?

- We have interviewed/assessed over 300 small businesses and organizations in a variety of different industries.
- We create a safe space for your team to tell us what they may typically be afraid to share. Surprising ideas and truths always surface when you let them. We know how to ask questions that matter, touch on important issues, and leverage feedback.
- Let's be direct. If you had the time to do this, you would have done it already.

What do I get?

A written report consisting of an unbiased review of:

- What is working well
- Areas for improvement or change
- Suggestions on where to focus to achieve the goals and milestones you have listed
- 2-4 specific projects that matter to the business
- A link to the broader ecosystem and market conditions that are relevant

The suggestions might be around a variety of areas, including:

- **Sales & Marketing:**
  - Retiring or revamping some offers
  - Retiring some customers
  - Changing or refining sales tactics
- **People & Teams:**
  - Role mappings and role fit
  - Updating onboarding processes
  - How to invest in your best areas
- **Strategy & Profitability**
  - Vulnerabilities to watch out for
  - Metrics — both insufficient and unhelpful as well as important metrics
- **Delivery & Execution**
  - Improvement to workflow and teams focused on delivery
  - Opportunities to simplify and systematize
  - Identification of common roadblocks

Why would I need an assessment?

- I feel like we're out of control and need to get the business back under control.
- I'm uncertain what is wrong – I can't get my arms around what is slowing up business growth.
- The team isn't delivering in line with our values or is not fully engaged.
- We keep repeating the same problem without making forward progress.
- We've got the right idea, but the execution is poor.
- We need to make a significant change, but it might seriously damage the company.
- Sales are sluggish.

Pricing
Invest your worry where it's going to make the difference

- Orgs up to 10 people - $4k
- Orgs up to 20 people - $6k
- Orgs up to 50 people - $10k
- Orgs up to 100 people - $15k

Some case studies. A few of the previous assessments we've done.

The problem: A large accounting/ bookkeeping company thought their **staff wasn't prepared enough to handle complex assignments**. But they were prepared, in the sense that they were technically strong. They just were not always confident in their recommendations when under pressure by clients to focus on something else or go in a different direction.

The assessment revealed that instead of focusing on technical preparedness, the staff needed additional support from each other to build confidence.

The action: They turned senior consultants into a "help desk" to provide rapid (one hour) ideas/ confirmations or recommendations.

The outcome: Customers were more satisfied with the work of the onsite outsourced consultant, and the consultants felt supported.

The problem: A VC firm of 3 talented partners was **struggling with execution.** They thought their problem was being clear about direction and priorities.

The assessment revealed different communication styles causing conflict. One liked to be challenged to do better, another liked thinking through options collaboratively, and the third wanted to understand if this was really the most important thing to deliver on before spending more time on it. It turned out they all appreciated delivering at a high standard and needed to have effective discussions to help them succeed.

The action: Each of the partners needed to clarify their expectations of themselves and invite people to hold them accountable in a way that worked for them.

The outcome: Their ability to recover from dropped balls was dramatically improved. It also allowed them to improve their skills, which they all appreciated.

The problem: A 30-person eCommerce company was **struggling to get their warehouse team reliably shipping all orders daily without errors.** They had some individually strong people, but they also had a steady stream of challenging people they would often have to be let go. They thought the problem could be best solved with a good leader for the warehouse team. They tried hiring at a variety of different price points, but everyone failed.

The assessment revealed that there was additional talent both as individual contributors in operations and leaders in other parts of the organization willing to help.

The action: They brought in leadership from other parts of the org to support both people within the operations team and the more recently hired operations manager. In this way, they could transfer the culture and solve operational problems that had plagued the group for years.

The outcome: The operations team has reduced errors by 50% while increasing items shipped by 25%, and they have extra time to work on large projects.

You have an infinite number of places to spend your time and things to worry about. Invest your time where it will make a difference. Contact travis@humanfirstworks.com for more information.