

HOLISTIC BUSINESS SCORECARD

Name:

Date:

Truths	1	2	3	4	5	6	7	8	9	10	11	12	Score
Marketing	You refuse to invest any money in marketing.			Seasonal or no marketing exists; you are not measuring ROI and fearful of marketing.			Cost efficient, diversified marketing efforts are in place yielding a full pipeline to a target market.			ROI is high, all advisors' calendars are full year-round, one marketing program does not drive the growth of your practice, your brand is superior to all others in your community.			
Operational Efficiency	Your office does not have a team or only has a part-time assistant with little training or direction.			Your team is not developed, managed, or utilized; no cross-training exists; high turnover and lack of consistency of team exists.			You have a strong team with some documented processes but an overlap of responsibilities exists; the team is not clear on positions resulting in difficulty holding them accountable			A superior team is in place acting within their unique ability and with current Responsibility Agreements; documented processes exist with peer accountability and strong culture.			
Net Profitability	Most or all of the money being made is being spent; you are struggling to obtain a positive ROI when you invest in your business.			You are solely responsible for income, and one income stream exists.			Another advisor is contributing to income, expenses are contained, numbers are tracked, profitability is increasing, revenue is recurring.			All of your living expenses are paid for by the net profitability of your business regardless of your production; you obtain quarterly documented P&L statements.			
Work / Life Balance	You are a workaholic and not involved in activities outside of work; stress, anxiety, and medical issues exist.			While you know it is important, outside of work and family you have no hobbies, interests, charitable or community involvement.			Work/life balance goals are shared with an accountability partner, the business doesn't run your life, and areas outside of your business and family bring you joy.			You are truly well-balanced and spend time doing things you are passionate about, such as social, community, charitable, family, and health activities.			
Self-Managing Company	You refuse to give up control, you don't delegate, you don't trust your support staff and they don't trust you.			You are not comfortable giving up control of any aspect of the business but have been delegating, you have a good team member or two in place, all team members report to you.			A reliable team is in place, delegation exists, written goals are in place.			You could take a year off, have only one person reporting to you who has total control of day-to-day operations, total trust exists, goals are being set and met.			
Holistic Business Model	You aren't aware nor care to be aware of insurance, social security, medicare, tax, financial, and legal solutions to offer clients and you focus on one product			You give most of the same advice to all clients; all needs of clients are not handled.			Holistic services are offered but not offered as a holistic plan; professional partnerships exist in your one-stop shop.			You take clients through a documented holistic planning process to meet all of their complete needs of insurance, social security, medicare, tax, financial, and legal concerns.			
Personal Growth and Development	You know you aren't in a good place with your development but are not interested in improving and are uncoachable.			You know you should invest in yourself but don't take the time to do so.			You know the value of personal growth and development, have outside affiliations, and attend industry events.			You have outside affiliations, attend industry conferences, have strong employee development programs with lifetime learning objectives, and have scheduled staff training.			
Financial Planning	You lead with products, give the same pitch to everyone, and do not care to educate your clients.			You understand the importance and are trying to make more well-rounded recommendations taking into consideration tax, insurance, and financial effects.			You put the clients' best interests first, are providing a plan to each client but your planning process is primarily focused just to sell products or portfolio.			You lead with the plan, are consultative, educate vs. sell, follow a process, are a true fiduciary, and have coordination between the financial, tax, insurance and legal planning.			

After adding up your score, contact one of our Financial Advisors to discuss your results. Set up an appointment today by calling **903.533.8585** or email jose@felicianofinancial.com

YOUR TOTAL SCORE