

Sarah Richardson Consulting Pty Ltd

Take the Sarah Richardson Consulting Survey to identify your potential business advice needs!

Strategic Planning

Typical annual growth >5% in last five years	YES	NO
Lack of effective processes eg business development, HR, finance and budgeting, marketing, sales	YES	NO
No Strategic, Business or Marketing Plan	YES	NO
Organisation objectives undefined or not understood by staff	YES	NO
Debt financing >50% and/or significant increase in last five years	YES	NO
Managing Director/CEO more involved than desired in day-to-day operations	YES	NO
Organisation internally not externally focused eg market and/or customer trends not broadly understood by staff	YES	NO
Organisation point of difference(s) not consistently articulated and/or understood by staff	YES	NO
Lack of staff ownership of program development and implementation eg silo mentality	YES	NO
No defined program targets and/or post-implementation reviews	YES	NO

If majority of answers are Yes: **A fully costed Business Plan might be appropriate; timeframe 2 months.**

Human Resources

Second or third generation family employed	YES	NO
Job Descriptions by person not role and lack of accountability	YES	NO
Frequent Organisation Structure redesign in last five years or documented Organisation Structure not followed	YES	NO
Inconsistent Salary Structures	YES	NO
Lack of HR disciplines eg evaluations, training, exit interviews, recruitment processes	YES	NO
High absenteeism, low morale and/or high staff turnover	YES	NO
Staff dismissal outside of probation period in last two years	YES	NO
Allegation of bullying, harassment or unfair dismissal in last two years	YES	NO
Lack of staff understanding of organisation direction	YES	NO
Customer and/or supplier relationships strained	YES	NO

If majority of answers are Yes: **An Organisation Structure & Processes project could be worthwhile; timeframe 6 weeks.**

Marketing

No marketing position at executive level	YES	NO
Marketing spend <5% of sales	YES	NO
Brand awareness suspected low (amongst non-users)	YES	NO
Organisation has evolved and marketing has not kept up eg logo, advertising, marketing materials, website	YES	NO
Tactical marketing is the focus to the exclusion of strategic marketing	YES	NO
No annual Marketing Plan	YES	NO
Annual Marketing Budget is adjusted as programs arise or cost cutting required	YES	NO
Lack of understanding of the organisation by existing customers and/or suppliers	YES	NO
Undifferentiated marketing and/or sales by customer group	YES	NO
No brand champion in organisation	YES	NO

If majority of answers are Yes: **A Marketing Direction project might add value; timeframe 6 weeks.**

Profitability

Low pricing strategy and competition based (equal or lower than competition) not margin based	YES	NO
Cash flow not under control: eg signoffs by item or project not functional area budget; short-term sales (and debtors) focus; stop-gap bank funds requested; lengthening creditors payment cycle and some creditors exiting	YES	NO
Lack of achievement of Monthly Budget by line item more than one third of time in last two years	YES	NO
Pricing responsibility spread in organisation and/or located in sales area rather than responsibility in marketing or general management area	YES	NO
No margin targets and/or lack of awareness/ownership by staff	YES	NO
Cost of sales increasing at a faster rate than revenue	YES	NO
Operating costs increasing at a faster rate than revenue	YES	NO
<48% GP in any of last five years	YES	NO
<10% NPBT in any of last five years	YES	NO
Sales team claims of inability to meet budgeted volume without price reductions	YES	NO

If majority of answers are Yes: **A Pricing & Profitability project could be considered; timeframe 4 weeks.**