

KWP GROWTH ASSESSMENT – UNLOCK THE KEY TO YOUR SUCCESS

Determine your company's current growth stage and which Kathleen Wood Partners key unlocks the power of you, your business and growth! This is not meant to be a comprehensive analysis as much as a quick checklist for you to assess your strengths and areas of opportunity to grow.

The KWP Power of One Growth Assessment also provides you insights to look at keys which might be best for you. At KWP we recognize every business is unique and we are able to customize solutions specific for your business.

This is a self-assessment – there is no judging, right or wrong it is just a perspective based on our 20 years of KWP propelling Founder-led businesses forward for success and growth!

Each Checkbox = 1 point - Maximum Score = 36

Check the boxes that are most applicable to your current situation.

Power of One VISION

- 1) ☐ We have a clear and compelling written vision that inspires and aligns our team.
- 2) ☐ Our vision is consistently communicated and used to drive decision making.
- 3) ☐ We revisit and refine our vision regularly to stay relevant and bold.
- 4) ☐ I have a clear exit strategy.

Power of One TEAM

- 5) ☐ We have the right people in the right roles with clear expectations.
- 6) ☐ Our leadership team is aligned, collaborative, and accountable.
- 7) ☐ We have a formal training and development program for all new hires.
- 8) ☐ Our leadership team operates independently and does not rely solely on the Founder for decision-making.

Power of One DIRECTION

- 9) ☐ We have a written 3-year strategic plan with financial metrics, organizational development, and growth projections.
- 10) ☐ We have an annual plan that includes a budget, operational metrics, financial performance targets, and succession planning.
- 11) ☐ We have 3-5 strategic priorities that guide all actions and initiatives.
- 12) ☐ We have clear Key Performance Indicators (KPIs) aligned to business strategy.

Power of One SYSTEM

- 13) ☐ We have scalable systems, tools, and processes in place to support growth.
- 14) ☐ Our technology and systems can scale with growth without major reinvestment.
- 15) ☐ We conduct monthly and quarterly business reviews on a scheduled and consistent basis.
- 16) ☐ We have formalized risk management, insurance, and compliance processes.

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Power of One BRAND

- 17) ☐ Our brand clearly communicates who we are and why we matter.
 18) ☐ We regularly conduct market analysis and competitive reviews.
 19) ☐ We have a written 12-month sales-driving marketing plan.
 20) ☐ We have a clear and documented customer acquisition and retention strategy.

Power of One CULTURE

- 21) ☐ We have a written define culture that we measure for effectiveness and engagement.
 22) ☐ We have programs for rewards and recognition aligned to our culture.
 23) ☐ We intentionally foster a culture of performance, purpose, and fun.
 24) ☐ We regularly measure our people metrics, turnover, retention and internal promotes

Financial Visibility

- 25) ☐ We consistently meet or exceed our financial targets and forecasts.
 26) ☐ We have completed a valuation of our business within the last two years.
 27) ☐ We have strong cash flow management practices and sufficient reserves for 3-6 months of operations.
 28) ☐ We have established an Advisory Board or Governance Board with external advisors.

Team Structure Check-In

- 29) ☐ Do you have a President/CEO?
 30) ☐ Do you have a Defined leader of Marketing?
 31) ☐ Do you have a Defined leader of Human Resources?
 32) ☐ Do you have a Defined leader of Operations?
 33) ☐ Do you have a Defined leader of Purchasing?
 34) ☐ Do you have a Defined leader of IT/Technology?
 35) ☐ Do you have a Defined leader of Accounting and Finance?

Match your score to your Unlock Your Key for Success.

Your Results:

Total Checked Boxes: _____

Your Key to Success: _____

Find Your Key to Success

Score Range	Growth State	Key to Success
28-35	Growth Ready	GOLD – Power of One Systems for Growth
20-27	Growth Driving	SILVER - Strategic Services
13-19	Growth Group	STEEL - Founder's Round Tables
Below 12	Growth Emerging	BRONZE - Classes & Webinars

Contact us at Success@kwoodpartners.com if you would like to discuss your results!