

Champion: _____

Team: _____

Organization: _____

Date: _____

25 FINANCIAL PIVOTS FOR WINDFALL

HOW DO YOU ANSWER KEY QUESTIONS ABOUT YOUR BUSINESS DNA THIS MONTH?

Knowing is not doing. Improve the most meaningful answer each week to compound change into windfall.

- | | |
|--------------------|---|
| Purpose | 1. Which of 12 psychological needs drive demand from your ideal clients (markspencercook.com/twelve)?
2. Are you in a survive (liquidity), optimize (income) or mature (cashflow) phase?
3. How many qualified leads are each salesperson given each month? |
| Liabilities | 4. Which short-term debt is financing anything long-term?
5. Which long-term debt is used for short-term working capital?
6. Have you eliminated costly current liabilities this month? |
| Expenses | 7. Can you provide year-to-date financial and bank statements, plus the same period last year?
8. Which expenses do NOT directly: gain new clients or retain ideal clients?
9. How much lower have you negotiated COGS this month? |
| Cash Out | 10. How much have you renegotiated all vendor costs this month?
11. Why are you making vs. buying on major initiatives?
12. Have you stretched your AP terms this month? |
| Assets | 13. Which slow-selling items did you discontinue and liquidate this month?
14. How much did you reduce inventory this month for items that sell?
15. Where is your current, primary constraint in the organization? |
| Revenue | 16. Which of 30 methods to increase revenue have you applied this month?
17. Which prospecting methods have been most efficient in your history?
18. Which teams eagerly help close sales and how? |
| Cash In | 19. How did you make it easier for clients to pay this month?
20. How much was A/R accelerated this month?
21. What terms did you change to reflect the real cost of business? |
| Pivot | 22. Which angles have you not captured of clients' sites, experiences and passions?
23. Have you asked new experts for ideas about better service this month?
24. Which two improvements raised client experience this month?
25. How many times did clients achieve their purpose this month? |