

# ALIGN REPORT

Client Company Name

*Advisor Name*

*Firm Name*

# ALIGN REPORT

Presented by:  
Advisor Name  
Advisor Firm Name

Prepared for:  
Company Name

## Executive Summary

### Alignment: Top Five Misaligned Drivers

The Assessment asks participants to rate each Value Driver by selecting one of five response options. This creates a rating scale of 1 through 5 for each driver. Using that information, we are able to determine where the participants are aligned in their rating of a Value Driver (they gave a similar rating) and where they are misaligned (they gave different ratings).

Below lists the top three most misaligned Value Drivers.

1. Market Share
2. Brand
3. Customer Satisfaction

#### **Pro Tip:**

*Focusing first on these drivers will uncover why team members are not in agreement. From a lack of communication, to different responsibilities within the business, to no information about the Driver in question. All are valid reasons to be discussed.*

### Value Gap: Top Contributing Drivers

The Value Gap represents where the business can improve to increase the Enterprise Value. Below are the Value Drivers that are contributing most to the Value Gap based on responses.

1. Financial (Alignment)
2. Market Share vs. Growth (Misalignment)
3. Recurring Revenue vs. Operations (Misalignment)

#### **Pro Tip:**

*These top Value Drivers represent the areas of the business that are in most need for improvement according to the participants. Understanding more specifically about how each participant believes these areas can improve is a good step to prioritizing the work that should be done next. It is suggested that a Grow Assessment is completed to determine the dollar value of each Driver in order to prioritize initiatives.*

# ALIGN REPORT

Presented by:  
Advisor Name  
Advisor Firm Name

Prepared for:  
Company Name

## Alignment

The assessment asked one question for each Value Driver. Each participant selected one of five responses for each question. We have assigned a rating scale to each question, as indicated below:

Rating	Score
Excellent (5)	Participant selected the <b>highest</b> answer choice for that Value Driver
Good (4)	Participant selected <b>2<sup>nd</sup> highest</b> answer choice for that Value Driver
Average (3)	Participant selected the <b>middle</b> answer choice for that Value Driver
Low (2)	Participant selected the <b>2<sup>nd</sup> lowest</b> answer choice for that Value Driver
Poor (1)	Participant selected the <b>lowest</b> answer choice for that Value Driver

To visually assess the alignment for each Value Driver, we have put the Value Drivers into a table below. The analytics uses the above ratings to determine how aligned the participants are for each Value Driver.

Light Green = Total Alignment  
Dark Green = Misalignment  
Orange = Serious Misalignment

Value Driver	John	Joseph	Jim	
Customer Diversification	Excellent	Good	Good	
Business Overview	Good	Excellent	Excellent	
Senior Management	Average	Average	Average	
Legal	Good	Good	Good	
Financial	Low	Average	Average	
Sales & Marketing	Good	Excellent	Excellent	
Innovation	Excellent	Excellent	Excellent	
Growth	Excellent	Good	Good	
Potential Market	Excellent	Excellent	Excellent	
Market Share	Low	Good	Good	
Barriers to Entry	Good	Good	Good	
Product Differentiation	Good	Excellent	Excellent	
Margin Advantage	Good	Good	Good	
Operations	Good	Good	Good	
Customer Satisfaction	Average	Excellent	Excellent	
Human Resources	Average	Good	Good	
Recurring Revenue	Average	Good	Good	
Brand	Low	Good	Good	

# ALIGN REPORT

Presented by:  
Advisor Name  
Advisor Firm Name

Prepared for:  
Company Name

## Appendix: Team Member Breakdown

The following is a breakdown of answers that were selected by each team member. This is a representation of the data behind the team's understanding of each Driver as a whole:

Growth	<i>Does your business have a history of consistent growth greater than competitors, coupled with projected future revenue growth above the market's rate?</i>		Participant Response
	My business is on fire.		John
	We're growing at a good clip.		Joseph, Jim
	We're holding steady.		
	Business is slowing down.		
	Honestly, things aren't so good right now.		
Potential Market	<i>Does the market support significant growth of your business?</i>		Participant Response
	Our market is enormous.		Joseph, John, Jim
	Our market is very large.		
	Our market is pretty big.		
	Our market is on the smaller side.		
	Our market is pretty small.		
Market Share	<i>Does your business own the highest percentage of the available market relative to its competitors?</i>		Participant Response
	We have the highest share of the market.		
	We're near the top.		Joseph
	We're right in the middle.		Jim
	We're one of the smaller players.		John
	We're practically invisible.		
Recurring Revenue	<i>Can your business rely on a portion of future revenue from contractually committed customers?</i>		Participant Response
	We have assurances of nearly all future revenue.		
	We have assurances of more than half our future revenue.		Joseph
	We have some contracts or other reasons why we're confident in future revenue.		John, Jim
	We have only a few contracts or reasons why we're confident in future revenue.		
	We're not very confident in our future revenue.		
Barriers to Entry	<i>Are there significant obstacles facing a new entrant into your business' market?</i>		Participant Response
	It's nearly impossible to break into our market.		
	It's pretty tough, but doable.		John, Joseph, Jim
	Our market has some notable barriers.		
	There are a few barriers.		
	Almost anyone can set up shop.		
Product Differentiation	<i>Does your business have a product/service with unique characteristics that provide a competitive advantage?</i>		Participant Response
	We offer something completely unique, and that's why customers like us.		Joseph
	We have some important differences.		John
	We offer something different that customers like.		Jim
	We have a few small things that set us apart.		
	We look like everyone else.		
Brand	<i>Does your business have a recognizable brand that reinforces the business' presence in the marketplace and supports the business's objectives,</i>		Participant Response
	Our brand is everything and everyone knows us.		
	We have a pretty strong brand that folks recognize.		Joseph, Jim
	Our brand is solid but not special.		
	Our brand isn't very strong.		John
	We don't have a brand.		

# ALIGN REPORT

Presented by:  
Advisor Name  
Advisor Firm Name

Prepared for:  
Company Name

Margin Advantage	<i>Does your business enjoy gross &amp; net margins greater than industry norms?</i>		Participant Response
	Yes, we're printing money compared to our competitors.		
	Our margins are better than most.		John, Joseph
	Our margins are solid, like everyone else's.		Jim
	We're making money but less than most.		
	We're struggling to make any money.		
Customer Diversification	<i>Does your business have a well-diversified customer base?</i>		Participant Response
	We have so many customers we won't lose sleep if a few leave.		John, Jim
	We can lose a few customers and still be fine.		Joseph
	We can lose some customers but we'll feel it.		
	It would be really tough if we lost even one customer.		
	If any of our customers left, we'd be out of business.		
Business Overview	<i>Can an outsider easily obtain a holistic understanding of your business, including your business' performance, practices, culture, discipline, mission?</i>		Participant Response
	Yes, our business is very easy to figure out.		Joseph, Jim
	One could figure it out with some digging.		John
	Some stuff is easy to figure out, the rest probably not.		
	It wouldn't be easy.		
	It would be nearly impossible.		
Financial	<i>Are all business financial matters in order and do you follow best practices?</i>		Participant Response
	Yes, and we would be 100% comfortable if we were audited.		
	We're pretty on top of our finances.		
	We do an OK job of managing our finances.		Joseph, Jim
	We could do a better job of managing our finances.		John
	We don't pay much attention to our finances beyond how much money we have in the bank.		
Sales and Marketing	<i>Can your business produce revenue in a proven and systematic way, ensuring the business is sustainable and not simply based on the efforts of individuals within the business today?</i>		Participant Response
	We have an effective sales and marketing process that anyone could learn.		Joseph
	We have a sales and marketing process, but it would take time for someone to learn it.		John, Jim
	We have a sales and marketing process, but our success is more about our people.		
	We're pretty reliant on a few sales and marketing people, but we could get by if they left the business.		
	If our key sales or marketing folks left, we would have some big problems.		
Operations	<i>Does your business have the ability to deliver on the sales promises made to the marketplace and to deliver in a systematic and process-driven manner?</i>		Participant Response
	Yes, our business runs like a well-oiled machine.		Jim
	We're pretty good.		John, Joseph
	We do an OK job.		
	We could do a better job.		
	We could really use some help.		
Customer Satisfaction	<i>Does your business track and use key measures to meet customer expectations at all levels?</i>		Participant Response
	Yes, we know exactly how we're doing with our customers at any point in time.		Joseph
	We have a pretty good idea most of the time.		Jim
	We have the ability to check when we need to.		John
	Not completely sure.		
	We really don't know.		

# ALIGN REPORT

Presented by:  
Advisor Name  
Advisor Firm Name

Prepared for:  
Company Name

Senior Management	<i>Does your business have a leadership team/individual in place to realize the business' vision and mission while helping the owner achieve his/her objectives?</i>		Participant Response
	Yes, we have an outstanding management team.		
	We have a very good management team.		
	Our management team is pretty solid, most of the time.		John, Joseph, Jim
	Our management team isn't always clicking.		
	We could, but don't really have a management team, or our team is a bit dysfunctional.		
	The business doesn't have any other employees besides the business owner.		
Human Resources	<i>Does your business have the ability to find, develop, and retain quality individuals that enables success in all aspects of your business?</i>		Participant Response
	Yes, we can easily find, hire, and retain the best of the best, if and when needed.		
	We're pretty good.		Joseph
	We're OK.		John, Jim
	We can use some help.		
	HR is a problem for us.		
	The business doesn't have any other employees besides the business owner.		
Legal	<i>Do you have all legal matters in order, documented, and does your business follow best legal practices?</i>		Participant Response
	Yes, we are completely buttoned up.		
	We're pretty good.		Joseph, John, Jim
	We're doing an OK job.		
	We could do a better job.		
	Legal matters are a bit of a headache for us.		
Innovation	<i>Does your business understand that innovation is invaluable to creating an ongoing competitive advantage and does it have a proven and systematic way to drive and capture innovation at all levels and encourages innovation?</i>		Participant Response
	Yes, we drive and capture innovation at every level within the organization.		Joseph, John, Jim
	We're pretty good at encouraging and capturing innovation.		
	We recognize good ideas when they bubble up.		
	We look at new ideas, but tend to just stick with what's working.		
	We don't put a lot of energy into new and unproven ideas.		

# ALIGN REPORT

Presented by:  
Advisor Name  
Advisor Firm Name

Prepared for:  
Company Name

## Understanding the Report & Assessment Next Steps

When an individual Business Owner completes the initial business assessment, the operational strengths and weaknesses of the business can be determined through the parts of the business known as the “Value Drivers”. Within a leadership team, having the same assessment completed by multiple members, a new layer of information is brought to light: How aligned is the team in what is going well in the business and what are major areas of concern?

This report presents a rating on how aligned the members of a leadership team are on each of the Value Drivers. The rating system is the first stage in figuring out where a team is in agreement on the Value Drivers before delving into potential solutions and fixes.

With the Executive Team Report, you now have an understanding of where the team and business are today. This report gives you a specific location on the map to begin the next stage of your company’s journey. Now that you know where you are, you can map out a path towards the destination you wish to take.

# ALIGN REPORT

Presented by:  
Advisor Name  
Advisor Firm Name

Prepared for:  
Company Name

## Appendix: "Next Steps" Worksheet

Driver	Assigned to	Experts Needed

Action Items	Notes

Driver	Assigned to	Experts Needed

Action Items	Notes

Driver	Assigned to	Experts Needed

Action Items	Notes

Driver	Assigned to	Experts Needed

Action Items	Notes

Driver	Assigned to	Experts Needed

Action Items	Notes