

Ensure Your Business is Optimized for Success.



**Take our Mini-OHA Quiz
on page 6 and see how your
business measures up!**

Your business shouldn't be running you. You should be running your business!

Organizational Health Assessment



Executive Solutions to Corporate Challenges

Scan to discover more.



236-420-3339

admin@iwgservices.ca

www.iwgservices.ca

Landmark 3, Suite 620-1632 Dickson Avenue, Kelowna, BC V1Y 7T2

"Executive Solutions to Corporate Challenges"

Organizational Health Assessment



Our proprietary checklists help determine the current health of your organization.
We analyze major departments common to most businesses, including:

1 Corporate Governance / Compliance

- Corporate documents for compliance
- Partnership agreements
- Corporate & share structures
- Annual provincial society filings
- Annual general meeting minutes
- **Anything regarding legal documents**



2 Business Operations

- Long & short business plans
- Operational plans
- HR documentation and processes
- Health & safety plans & training
- Recruitment & hiring procedures
- **Anything that runs the company**



3 Human Resources

- Employee policies & handbook
- Job descriptions & wage ranges
- Hiring and onboarding systems
- Organizational hierarchy chart
- Performance tracking & reviews
- **Anything to do with employees**



4 Occupational Health & Safety

- Health & safety committee / person
- Risk assessments and analysis
- Safety training on equipment
- Emergency / contingency plans
- Ergonomic assessment & solutions
- **Anything safety related**



5 Accounting & Financial Reporting

- Accounting & bookkeeping practices
- Payroll and source deductions
- GST and PST filings
- Monthly financial reporting
- Business / inventory valuations
- **Anything related to financial**



6 Business Development & Sales

- Sales processes & training
- Commission / pay structures
- Client relations & CRM
- Expense policies
- Product pricing analysis, etc.
- **Anything that generates sales**



7 Merger - Acquisition / Succession Planning

- Developing an exit strategy
- Preparing your business for sale
- Leadership development strategy
- Tax-saving strategies for exiting
- Financial & insurance products
- **Ensuring a smooth transition**



8 Branding & Marketing

- Mission & vision statements & values
- Target market research
- Industry & competitor's analysis
- Branding program & assets
- Marketing / advertising plan & budget
- **Anything to do with brand awareness**



"Executive Solutions to Corporate Challenges"

Your Partners in Success



Organizational Assessment

Helps to align your internal structures, processes and systems to uncover your weaknesses and strengthen your operations.



Strategic Planning

An in-depth plan defines your strategy and helps you make decisions on how best to allocate your resources to pursue this plan and achieve your goals.



Professionalize Your Business

Professionalizing your business by implementing repeatable processes, systems and people allows you to measure performance and create a culture of continuous growth.

Our Tried & True Process



1

Health Assessment

This assessment is a comprehensive set of questions we work through with you, resulting in an in-depth analysis of your company, its goals, departments and systems. Our team goes through your answers and evaluates each area thoroughly.

3

Recommendations

After the Organizational Health Assessment, you will know what areas of your business you need to professionalize.

The report outlines steps you may want to take to bring your business into compliance with regulations and what types of policies or procedures you need to operate more efficiently.

2

Analyze Results

After reviewing your OHA, our team summarizes the results and gives you a report with our recommendations for improvement. Together we review and discuss these to get a clear understanding of your strengths and weaknesses and where to focus future efforts.

4

Implementation

You and your team can begin implementation of the recommendations, to build a better company and reduce any deficiencies. If your team lacks the resources or skills to accomplish your goals, the IWG Corporate Services team offers assistance in select areas or can recommend professional agencies needed.



*Executive Solutions to
Corporate Challenges.*

Call today to book your customized
Organizational Health Assessment

778-721-5985

admin@IWGservices.ca

www.IWGservices.ca

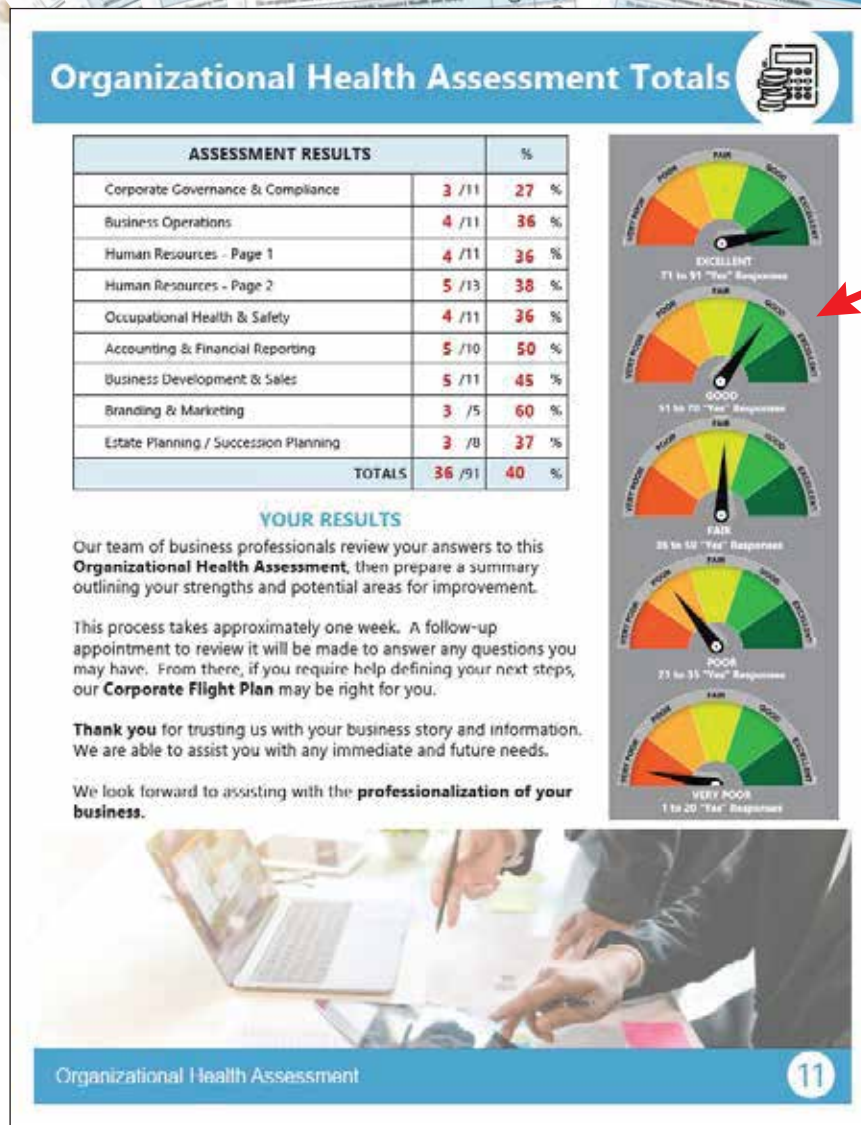
Organizational Health Assessment



Our proprietary OHA (Organizational Health Assessment) consists of 90+ questions that delve into the current operational status of your business.

We ask questions pertaining to each major department in your operations to discover your business strengths, and what areas may be holding you back from your goals and success.

A 3rd-party, external perspective is valuable to identify areas needing strategic planning to be implemented.



After an OHA is complete, you will receive a score for each department. Our team goes through the answers and develops a customized report outlining the top priorities. We identify departments that need extra work to improve your operations and systems.

***It's about professionalizing your business
to maximize value & efficiencies!***

"Executive Solutions to Corporate Challenges"

Organizational Health Assessment Totals



ASSESSMENT RESULTS		%
Corporate Governance & Compliance	3 /11	27 %
Business Operations	4 /11	36 %
Human Resources - Page 1	4 /11	36 %
Human Resources - Page 2	5 /13	38 %
Occupational Health & Safety	4 /11	36 %
Accounting & Financial Reporting	5 /10	50 %
Business Development & Sales	5 /11	45 %
Branding & Marketing	3 /5	60 %
Estate Planning / Succession Planning	3 /8	37 %
TOTALS	36 /91	40 %

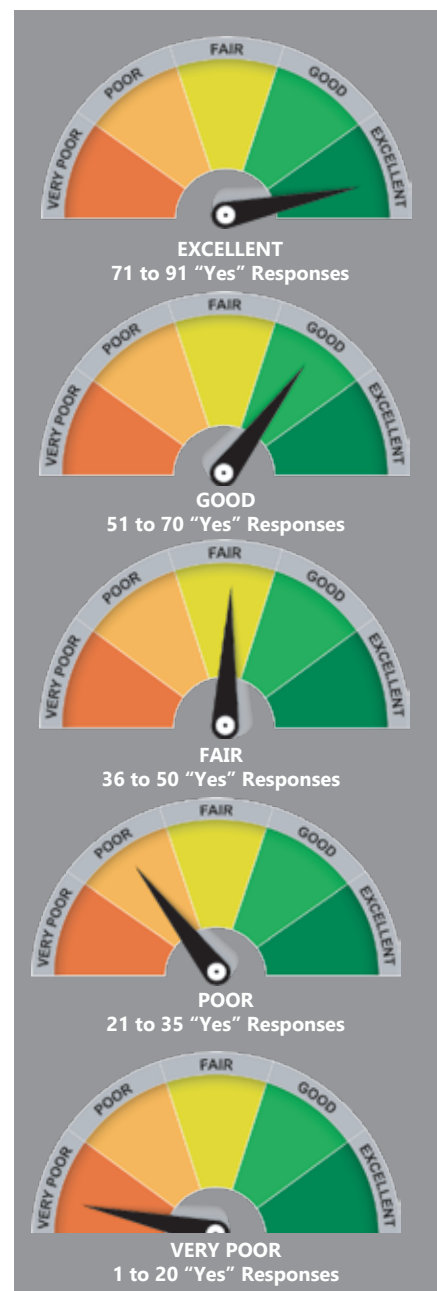
YOUR RESULTS

Our team of business professionals review your answers from the **Organizational Health Assessment**, a summary is prepared, outlining your strengths and potential areas for improvement.

This process takes approximately one week. A follow-up meeting to review it will be made to answer any questions you may have. From there, if you require help defining your next steps, our **Corporate Flight Plan** may be right for you.

Thank you for trusting us with your business story and information. We are able to assist you with any immediate and future needs.

We look forward to assisting with the **professionalization of your business**.



Take our Mini-OHA Quiz on the next page and see how your business measures up!

Try our Mini-OHA to see how you score.



Answer these 15 questions (from over 90+) from our OHA to see how your business scores. These are sample questions from our 8 core pillars of business the OHA covers to measure business optimization.

1. **When was the last time you updated your business plan(s)?**
 - a. Within the last 6 months.
 - b. 6-12 months ago.
 - c. In the last 2 years.
 - d. More than 2 years ago.
 - e. Not since starting the business.
2. **Do you have a detailed "onboarding plan" for new employees?**
 - a. Yes.
 - b. Sort of.
 - c. No.
 - d. Not sure.
3. **Does your business have an Operations Manual for all departments?**
 - a. Yes, it's regularly updated.
 - b. Yes, but it's outdated.
 - c. Partially for some departments.
 - d. No.
4. **Do you have a Succession Plan for your business?**
 - a. Yes.
 - b. Started but not finished.
 - c. No.
5. **Do you conduct annual employee reviews?**
 - a. Yes.
 - b. Just once in awhile
 - c. No.
6. **Do you have an employee handbook with workplace policies outlined?**
 - a. Yes.
 - b. Not really, it's explained when they start.
 - c. What are workplace policies?
 - d. No.
7. **Do you have a system for monitoring employee training and re-certifications**
 - a. Yes, we are on it regularly.
 - b. We rely on employees to keep up to date.
 - c. We check one or twice a year.
 - d. No.
8. **Have you had a Workplace Ergonomic Assessment done to reduce employee injuries?**

- a. Yes, once a long time ago.
 - b. Yes, fairly recently.
 - c. We don't require it.
 - d. No.
9. **Have you had a tax audit done to ensure you're not overpaying?**
 - a. Yes
 - b. Never thought about it before
 - c. No
 - d. I don't mind paying too much in taxes.
10. **Do you have monthly financial reporting and compare to budgets & forecasts?**
 - a. Yes, check financials with plans monthly.
 - b. Every few months.
 - c. Just an annual review with our bookkeeper/accountant.
 - d. No, we wing it.
11. **Do you have a system to recognize & evaluate new opportunities?**
 - a. Yes, we're always looking for new options.
 - b. We are not looking for opportunities.
 - c. No, never really thought about it.
12. **Have you created Buyer Personas for each of your identified target markets?**
 - a. Yes, we rely on them regularly.
 - b. We have a good idea who we sell to.
 - c. What's a Buyer Persona?
 - d. No, we sell to everyone.
13. **Do you have an up-to-date list of all professional services, contractors, and suppliers?**
 - a. Yes, we keep it up to date.
 - b. Yes, somewhere?
 - c. In our Business Card file.
 - d. No, the owner has that info in his head.
14. **Do you have a Brand Strategy driving your Marketing Plans?**
 - a. Yes, we live by our strategy.
 - b. No, we just have a good logo.
 - c. We've thought about it.
 - d. No, is it necessary?
15. **Do you have a CRM (Customer Relationship Management) system.**
 - a. Yes, we couldn't live without it.
 - b. We are considering getting one.
 - c. We do great with spreadsheets.
 - d. No, how would a CRM help?

NOTE: Our OHA questions are generally yes or no questions. We have added these multiple choice answers to give a sense of why they are relevant to an optimized business.

How have you scored on the Mini-OHA?



See how your business scores. Based on your answers, circle the **score on the right in RED**. Add up your score and compare it to the results gauge on the next page to see how your business does in these important areas.

1. **When was the last time you updated your business plan(s)?**
 - a. Within the last 6 months. 6
 - b. 6-12 months ago. 5
 - c. In the last 2 years. 3
 - d. More than 2 years ago. 1
 - e. Not since starting the business. 0
2. **Do you have a detailed "onboarding plan" for new employees?**
 - a. Yes. 6
 - b. Sort of. 3
 - c. No. 0
 - d. Not sure. 0
3. **Does your business have an Operations Manual for all departments?**
 - a. Yes, it's regularly updated. 6
 - b. Yes, but it's outdated. 3
 - c. Partially for some departments. 2
 - d. No. 0
4. **Do you have a Succession Plan for your business?**
 - a. Yes. 6
 - b. Started but not finished. 2
 - c. No. 0
5. **Do you conduct annual employee reviews?**
 - a. Yes. 6
 - b. Just once in awhile 2
 - c. No. 0
6. **Do you have an employee handbook with work place policies outlined?**
 - a. Yes. 6
 - b. No, it's explained when they start. 2
 - c. What are workplace policies? 0
 - d. No. 0
7. **Do you have a system for monitoring employee training and re-certifications**
 - a. Yes, we are on it regularly. 6
 - b. Rely on employees to keep up to date. 1
 - c. We check one or twice a year. 2
 - d. No. 0
8. **Have you had a Workplace Ergonomic Assessment done to reduce employee injuries?**

- a. Yes, once a long time ago. 4
 - b. Yes, fairly recently. 6
 - c. We don't require it. 0
 - d. No. 0
9. **Have you had a tax audit done to ensure you're not overpaying?**
 - a. Yes. 6
 - b. Never thought about it before 0
 - c. No 0
 - d. I don't mind paying too much in taxes. 0
10. **Do you have monthly financial reporting and compare to budgets & forecasts?**
 - a. Yes, check financials /w plans monthly. 6
 - b. Every few months. 3
 - c. Just an annual review with our bookkeeper/accountant. 1
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11. **Do you have a system to recognize & evaluate new opportunities?**
 - a. Yes, always looking for new options. 6
 - b. We are not looking for opportunities. 1
 - c. No, never really thought about it. 0
12. **Have you created Buyer Personas for each of your identified target markets?**
 - a. Yes, we rely on them regularly. 6
 - b. We have a good idea who we sell to. 4
 - c. What's a Buyer Persona? 0
 - d. No, we sell to everyone. -2
13. **Do you have an up-to-date list of all professional services, contractors, and suppliers?**
 - a. Yes, we keep it up to date. 6
 - b. Yes, somewhere? 3
 - c. In our Business Card file. 2
 - d. No, the owner has that in his head. 0
14. **Do you have a Brand Strategy driving your Marketing Plans?**
 - a. Yes, we live by our strategy. 6
 - b. No, we just have a good logo. 2
 - c. We've thought about it. 0
 - d. No, is it necessary? 0
15. **Do you have a CRM (Customer Relationship Management) system.**
 - a. Yes, we couldn't live without it. 6
 - b. We are considering getting one. 3
 - c. We do great with spreadsheets. 1
 - d. No, how would a CRM help? 0

NOTE: Our OHA questions are generally yes or no questions. We have added these multiple choice answers to give a sense of why they are relevant to an optimized business.

Organizational Health Assessment Totals



Your Mini-OHA Assessment Results

Add up your score from the Mini-OHA and find your total in the list below. From there, you can see how your business did on the scales to the right.

SCORE:

- 71-90** **EXCELLENT** - Well done, you seem to have lots going well.
51-70 **GOOD** - Your doing well, but there is room to improve.
36-50 **FAIR** - Your business should consider improvements.
21-35 **POOR** - Without improvement your business will stagnate.
1-20 **VERY POOR** - Your business must improve to survive.

Keep in mind, these questions represent only a couple questions from each key pillar of business, and although you may have scored well with these; there may be other areas within those pillars that determine how well your business is currently operating and if you still need some potential improvements to ensure you have an Excellent-rated business.

A full OHA has 90+ questions covering the 8 core pillars of business.

You Don't Know What You Don't Know - Until Now!

We understand how business owners can get tunnel vision when they are working "in" their business and not allocating the time needed to work "on" their business.

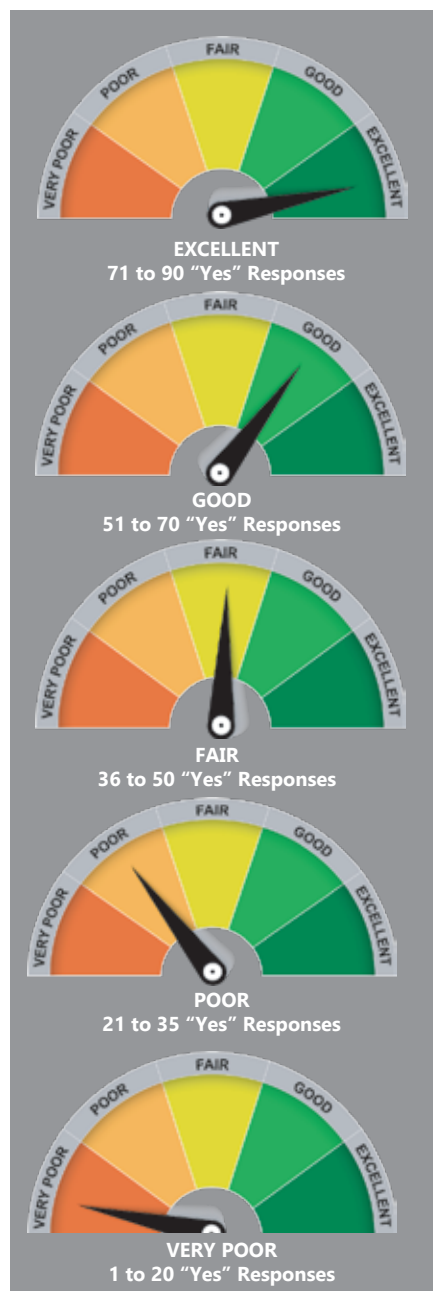
An outside perspective will see things a busy owner may miss.

Often minor tweaks can have dramatic impacts on your business and propel you to the next level of

your success. If you are looking to scale and grow, it's better to eliminate deficiencies to avoid scaling those too.

An OHA will strengthen your team and business to ensure it is ready for the challenges that lie ahead.

Book your OHA today and secure the dream you envision for your future.



Book Your Full Organizational Health Assessment Today!

Before you grow and scale your business, discover where you can **improve your business operations** and find hidden opportunities with an OHA from IWG Corporate Services.

This **low-cost investment** will deliver ways to ensure your business is **efficient, resilient, profitable and ready to grow** to the next level of success. Book your OHA today.

Call us Today at:
778-721-5985
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OHA appointment
or order online
by scanning here.



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