



# ENTREPRENEUR SELF-ASSESSMENT



THE  
**CHAZIN GROUP** LLC  
Plan > Launch > Grow > Your Business

## | INTRODUCTION: Why Self -Assessment is so Critical for Entrepreneurial Success

By completing the following **Entrepreneur Self-Assessment**®, you will gain a deeper understanding of the areas in which you currently possess expertise and competency. You will also gain a greater appreciation for the skills required to run your business that you are currently lacking and/or would be better served outsourcing to others.

The results obtained from completing this assessment will allow you to truly understand the skills you possess that you should work towards expanding/supplementing with additional training and professional development.

For the skills that you identify as lacking in expertise, you will need to choose a strategy from the following options to outsource those functions to:

- Sub-contractors, freelancers, and general contractors / either part-time versus contract basis;
- Existing employees; and
- New staff hires: part-time versus full-time, line staff versus Senior Management, other)

Upon completion of this Assessment, Ethan Chazin will sit with you to analyze your results, and provide **immediately actionable** strategies to move forward.

## | Your Past Experiences with Self-Assessment

Have you ever taken a self-assessment tool?

Yes \_\_\_ No \_\_\_

If **NO**: Have you ever considered taking a self-assessment tool to gauge your strengths as a business owner (and leader?)

Yes \_\_\_ No \_\_\_

If **YES**: which assessment tool(s) have you taken?

[ ☐ ] Myers-Briggs Type Indicator

[ ☐ ] DISC Sales Tool

[ ☐ ] The Birkman Method

[ ☐ ] Keirsey Temperament Sorter

[ ☐ ] Other(s): Please list all other assessment tools that you have taken:

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To the extent that you can remember, what did you learn about yourself from the results?

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## | Complete Your Personal Assessment

As entrepreneurs, most of us do everything required to run our businesses **OURSELVES**. We all have a general sense of the things we enjoy doing, and those tasks that we dread. Said another way, we know what our strengths are, and we know what we enjoy doing.

Please answer as many of the following questions as you can, so we can get a sense of your areas of strength (your passions) and those areas you would be well served gaining stronger control over or outsourcing.

**ENJOY!**

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1. Have you ever developed an “**IDEAL CUSTOMER PROFILE**” of your absolute BEST potential customer?  
Yes \_\_\_ No \_\_\_
  2. Have you ever managed employees (either on a project basis, as direct reports, or contract workers)  
Yes \_\_\_ No \_\_\_
  3. Do you have any experience writing a formal business plan?  
Yes\_\_\_ No \_\_\_
  4. Were you ever responsible for soliciting start-up funding through angel investors, venture capitalists, crowd funding or other investment sourcing options?  
Yes \_\_\_ No \_\_\_
  5. Have you created a strategic networking plan to define the industries/sectors your sales efforts should target and key industry associations to commit your selling efforts to? Yes \_\_\_ No \_\_\_
  6. Do you have a strong vision for your company? What is your vision/value statement?

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7. Do you have a simple mission statement? Yes \_\_\_ No \_\_\_

What is your mission statement?

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8. Do you have a company brand? Yes \_\_\_ No \_\_\_

If YES:

What is your branding statement?

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9. Does your company have written short term goals? Yes \_\_\_ No \_\_\_

Please list those goals:

The Next 3-6 Months:

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The Next 6-12 Months:

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10. What are your long term (five and ten year) goals?

Where do you see yourself in 5 years:

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Where do you see yourself in 10 years:

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11. Do you have a written plan outlining your strategies for achieving your one, five and ten year goals? Yes \_\_\_ No \_\_\_

IF YES:

12. What are those strategies, in top-down, HIGHEST to LOWEST priority order?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

13. Does your company have a written business plan that includes strategic and operational objectives for the year? Yes \_\_\_ No \_\_\_

IF YES:

14. Is this business plan being used, measured against and updated at least quarterly? Yes \_\_\_ No \_\_\_

15. Are there areas of your company where you're not sure how effectively you are operating? Yes \_\_\_ No \_\_\_

If YES:

What are those areas you are uncertain are operating at maximum efficiency?

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16. Does your company have a useful report card (dashboard reporting) that allows you to monitor all the critical aspects of your service offering, employee productivity, sales pipeline, administrative functions, etc?

Yes \_\_\_ No \_\_\_

If YES: What are those reporting tools, processes, procedures?

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17. Is your ENTIRE staff aware of the company's Vision, Mission, and goals? Yes \_\_\_ No \_\_\_

18. Are your employees actively engaged in/empowered to achieve these goals? Yes \_\_\_ No \_\_\_

19. How does your company measure progress achieved towards your strategic plan?

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20. And finally...

If you were holding a magic wand that you could waive RIGHT NOW to make your business dreams come true, “waive” it right now and answer the following question:

**“If there was **ONE** thing about your business that you would love to change **MOST**, what would that be?”**

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## | ENJOYING WHAT YOU'RE DOING: Your "Likes" and "Dislikes" Are So Revealing...

As business owners, we wear many hats. We are faced with the daily challenge of performing tasks across all of the functional areas required to run our business.

Please put a check in the appropriate box to the right of each task, to indicate whether you LIKE or DISLIKE doing the tasks required to run your business:.

TASK	LIKE	DISLIKE
<b>Marketing</b>		
- Advertising		
- Public Relations		
- Sales Promotions		
<b>Sales</b>		
- Sales planning		
- Pipeline development/management		
- In-person, client-facing		
- Phone-based (telemarketing)		
<b>Client Retention</b>		
- Client loyalty programs		
- Customer Care (Customer call center, post-sale)		
<b>Operations/Logistics</b>		
- Production		
- Sales/Order Fulfillment		
- Dealing with vendors/suppliers		
<b>Human Resources</b>		
- Recruiting		
- Candidate Screening (interviewing)		
- Employee Benefits Administration		
- Employee Training & Development		
- Coaching/Mentoring		
<b>Finances/Financial Planning</b>		
- Budgeting/forecasting		
- Balance sheets, income statements, cash flows		
<b>Employee Management</b>		
- Managing direct reports		

## | WHAT THIS ALL MEANS

Now that you are finished, please send your assessment to Ethan and we will schedule a time to discuss what your answers mean, and how you can turn that meaning into an immediately actionable career development plan for you to use to plan, launch, and grow a wildly successful business.



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