



## FINANCIAL PROFESSIONAL SELF-ASSESSMENT

*Performance  
Management  
Institute, Inc.*  
**Business Leadership  
Team Alignment**

YOUR NAME: \_\_\_\_\_ PHONE: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_ EMAIL: \_\_\_\_\_

SIZE OF ORGANIZATION (OR NUMBER OF PROFESSIONALS): \_\_\_\_\_

NUMBER OF SUPPORT STAFF: \_\_\_\_\_

TITLE/ROLE IN COMPANY: \_\_\_\_\_

GROSS REVENUES (MILLIONS – USD): \$ \_\_\_\_\_

### THE NUMBER ONE BUSINESS ISSUE YOU HAVE

1. Our most pressing business/client issue currently is:

**Comments:**

### THE MOST PRESSING PERFORMANCE MANAGEMENT OR FINANCIAL ISSUE YOU HAVE

2. Our most pressing performance management/financial issue is:

**Comments:**

### WHERE DO YOU SPEND YOUR TIME?

3. What percentage of your time do you devote to presenting financial statements as a part of your role in the organization? \_\_\_\_\_%

**Comments:**

**WHEN DO YOU CONDUCT CASH FLOW PLANNING?**

4. How often do you conduct cash flow planning sessions?

Number of times per *month* \_\_\_\_\_ *quarter* \_\_\_\_\_ *annually* \_\_\_\_\_.

**Comments:**

**ENGAGEMENT AND COMPREHENSION WITH NON-FINANCIAL CLIENTS AND COLLEAGUES**

5. Please rate the following statements on a scale of “1 to 10” (“1” is low, “10” is high):

5a. During my presentation(s), non-financial clients or colleagues are engaged and comprehend what I am saying. (Circle)

*At what level are they engaged? (Place an ‘x’ just to the right of the number)*

LOW MID-RANGE HIGH

1 2 3 4 5 6 7 8 9 10

*At what level do they comprehend what I am discussing?*

LOW MID-RANGE HIGH

1 2 3 4 5 6 7 8 9 10

**Comments:**

**THE FINANCIAL INFORMATION’S USABILITY**

5b. I rate my non-financial clients’ and colleagues’ perception of the information’s usability at this level: (Circle)

LOW MID-RANGE HIGH

1 2 3 4 5 6 7 8 9 10

**Comments:**

### **GRASPING THE MESSAGE**

6. In your opinion, what is the most difficult part of getting the “*essence of your message*” across to non-financial clients and colleagues?

**Comments:**

### **GRASPING FINANCIAL CONCEPTS**

7. From your observations, what do you think is/are the most difficult concept(s) for non-financial clients or colleagues to grasp?

**Comments:**

### **WHY DON'T THEY GRASP THE FINANCIAL CONCEPTS MORE EASILY?**

8. Why do you believe many non-financial associates have a difficult time grasping financial information?

*List as many thoughts as you want to share.*

### **BRIDGING THE UNDERSTANDING GAP**

9. When you observe non-financial clients or colleagues having difficulty with financial information or concepts, how do you bridge this barrier to understanding?

**Comments:**

## IS ACCOUNTING A COST OR AN INVESTMENT?

10. In your opinion, do your non-financial clients and colleagues see accounting services as a cost of doing business removed from what their activities, role and responsibilities are or as something more or different?

10a. I believe they see Accounting Services as a cost of doing business! (Check)

I Agree:    I Disagree:   

**Comments:**

10b. I believe they see Accounting Services as an “*investment in the wellness of the entire business.*” (Check)

I Agree:    I Disagree:   

## FINAL COMMENTS!

11. Are there any comments or questions you’d like to add?

**Comments:**