

NON-FINANCIAL BUSINESS PERSON
- FINANCIAL AND METRICS LITERACY SELF AUDIT -

YOUR NAME: _____ **PHONE:** _____

ORGANIZATION: _____ **EMAIL:** _____

TITLE/ROLE IN COMPANY: _____

BUSINESS CHALLENGES:

1a. My Company's current and most pressing business issue is:

1b. My Company's most pressing performance management/financial issue is:

MY PERSONAL COMFORT WITH FINANCIAL STATEMENTS:

2. My strongest memory/ies of grade school math is/are:

3a. My involvement(s) with financial statements in my work is/are:

3b. When my organization begins to discuss and analysis financial statements, my immediate response is to:

3b. When financial conversations begin, I frankly feel:

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THE VALUE OF UNDERSTANDING FINANCIAL STATEMENTS

4. I know there is great value to Financial Statements, but candidly I'm a bit lost when this conversation is being held. Is this a true statement?

Please respond candidly within the context of what your lack of ease with this subject might be costing you; or what value would a full understanding of the Financial Statements hold for you.

Or, you may be perfectly comfortable and in that case please let us know that as well.

5. If you are not as comfortable with Financial Statements as you'd like to be, what can we do to help you feel more comfortable?

6a. I understand the connection of what I do to impact the financial results, on a scale of 1 -10 (with 1 being I do not understand 10 meaning I fully understand) _____

6b. The metrics we use give me a clear way to understand the connection of what I do to financial the financial results, on a scale of 1 -10 (with 1 being I do not understand 10 meaning I fully understand) _____

7. Is there anything else you'd like to say or request?