

SAMPLE GM SCORECARD

Use a scale from 1 to 5 to rate your GM's performance.

- ① GM is currently not performing. Issue(s) must be addressed immediately, and family will schedule additional meetings.
- ② GM knows what to do to improve business performance, but there's an implementation problem resulting from a failure to communicate with coaches.
- ③ GM is currently effective.
- ④ GM is managing the company well despite challenges that are outside of the GM's control (e.g., new regulations, evolving customer preferences, higher input costs).
- ⑤ GM's systems and practices are functioning at maximum potential.

Financial Management

	1	2	3	4	5
Makes accurate sales projections.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manages cash effectively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintains accurate margins.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Uses debt for the success of the business.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Budget forecasts match actual performance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can identify and makes the financial decisions that have the greatest impact on profitability.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Leadership Management

	1	2	3	4	5
Manages coaches' performance to maximize results.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develops coaches' scope of abilities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monitors coaches' ability to communicate their performance expectations to employees in their divisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creates programs designed to optimize employee performance, then relies on the company's trainer to work with coaches to communicate, implement, and measure program effectiveness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Family/Ownership Communication					
	1	2	3	4	5
Provides family/ownership a review of performance at least quarterly or as requested.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicates key operational information to ownership.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is accessible and encourages family members to ask questions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Anticipates and communicates what family members want to know before they ask.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understands what the family expects from the business.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilitates relationships between family and nonfamily members within the business.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Reputation Building					
	1	2	3	4	5
Ensures that the company's reputation with customers and vendors constantly improves.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Online reviews demonstrate strong business reputation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vendors and business partners refer customers on a regular basis and approve of the company's business practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Company subcontractors (1) hold values that are similar to, or the same as, the company's; (2) support the company's ability to satisfy customers; and (3) are easy for the family and business to work with.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Keeps current with industry standard practices.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Operations Management					
	1	2	3	4	5
Constantly develops or improves policies and procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Designs methods to track the performance of programs and procedures (e.g., employee incentive programs, marketing efforts, introduction of new products).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Keeps up with and responds effectively to events that affect the business (e.g., industry trends, changing regulations).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Designs and implements successful sales training programs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finds methods to utilize business efficiencies (e.g., improvements to technology, system upgrades).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>