



Consulting • Research • Operations

Instructions: Answer each question as accurately and to the best of your knowledge as possible. Place an X in the corresponding column. Each column represents a point reference (top) and points should be added at the end of the Assessment for an overall rating.

CGA Small- and Mid-size Business Quick Assessment

RATING SYSTEM:

Superior Rating: 45-55
 Good Rating: 35-44
 Average Rating: 25 -34
 Below Average Rating: 24 and under

	1	2	3	4	5
	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
My staff has the competence to run a financial and economic analysis on my company.					
I have the support I need for critical meetings and decision-making.					
I am running the right cost analysis to correctly price our services.					
I have the proper processes in place to manage my HR, accounting and financials.					
I can trust the accuracy and the compliance of our accounting.					
If I were offered the opportunity to merge with another company, I am confident that my staff has the expertise to perform a Due Diligence.					
When researching financing options for my company, I am able to determine what type of financing best suits our needs.					
Our Profit and Loss Statement allows me to extract meaningful information to effectively manage my business.					
I have access to expert bookkeeping and financial management.					
I have the tools and knowledge to determine if a potential client is worth the investment.					
My accounting, financial and non-financial staff has the knowledge and expertise to provide me with the most accurate information.					