

Accelerate your vision

Building Your 12-Month Business Strategy

2017 Organizational Pre-Check

What are your financial goals for 2017?



Streamline your data analysis to identify key business drivers.

Does your budget align with your multi-year forecast?



Build robust forecasts, KPIs, and automated processes to stay on track.

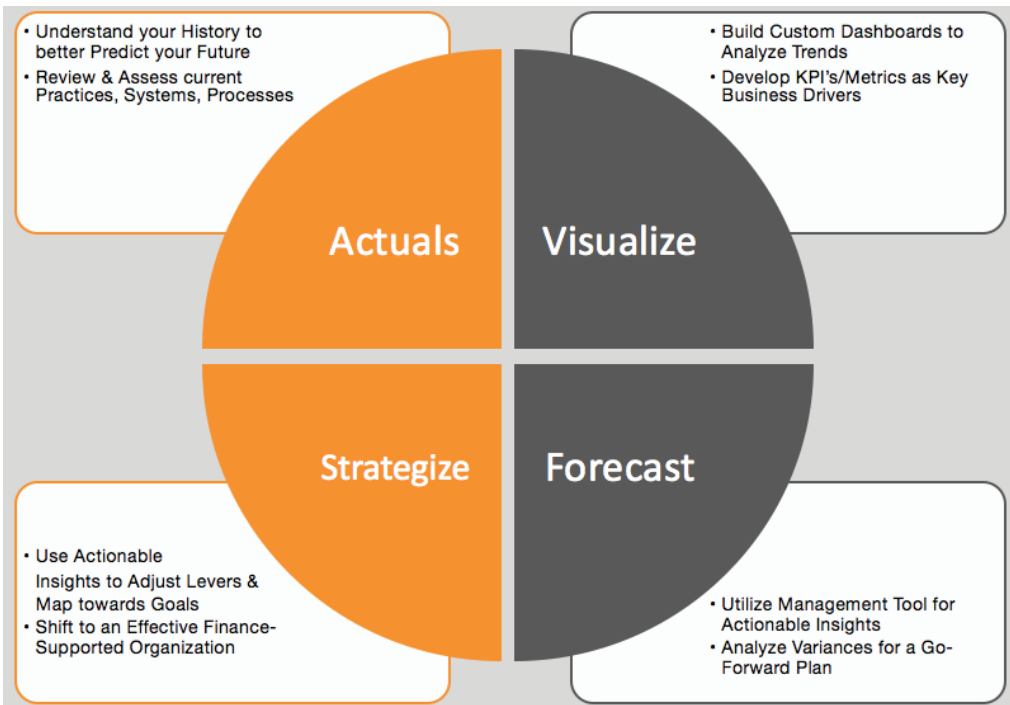
Are your current systems and team ready to scale?



Evaluate current systems & processes to implement the right tools to scale.

Refocus to Drive Effective Operations

By understanding financial and operational metrics, businesses are more capable to align its resources to push strategic objectives and drive performance.



9Gauge: Your Trusted Business Partner

9Gauge is a long-term strategic business partner with proficient execution skills - Advising and delivering on: strategy, keen company insights, comprehensive business intelligence. We utilize our combined experience and resources to get things done, swiftly and seamlessly.

Our veteran team of business advisors and consultants work as a natural extension of your in-house team to enable your success. We deliver the right solution with the right resources at the right time to help you get where you want to go, efficiently and effectively.

Having 9Gauge beside you accelerates growth, profitability and value – we accelerate your vision.



Exceed Your Expectations

Finance Checklist

Rating 1 to 10 (Poor to Excellent)

The following are key areas that drive a successful annual plan. Please use this as a guide line to rate how you view your organization today in comparison to where you would like it to be. (Enter 1 for "No" or "None".) Upon completion, send your checklist to **Grant McClendon (gmccclendon@9gauge.com)** for more information.

Actuals

- A.1. How well do you track and assess historical trends to set future goals?
- B.1. Are your financials aligned to convey your key drivers?
- B.2. How efficient is your accounting and finance operations and reporting process?
- C.1. How well do your systems effectively communicate to deliver the information Leadership/Management wants?
- C.2. Which systems do you use (i.e., QuickBooks, Bill.com, Salesforce, Adaptive Insights, NetSuite)?

1 2 3 4 5 6 7 8 9 10

Visualize

- A.1. How measurable are your organizational KPI's?
- B.1. How well are your metrics and data laid out into custom reporting dashboards?
- B.2. Does your reporting have drill down capabilities?

1 2 3 4 5 6 7 8 9 10

Yes / No

Forecast

- A.1. Do you have a forecast model?
- A.2. Does your model give you the specifics you want or need to run your organization?
- A.3. What does your model do well or not do well?

1 2 3 4 5 6 7 8 9 10

Yes / No

- B.1. Have you planned out a multi-year budget?

Yes / No

Strategize

- A.1. What long-term goals do you have? How do you plan to step closer to that goal in 2017?
- A.2. Are any of these events/transactions in your near future?
- B.1. How well do you use finance to drive your organization?
- C.1. What is the next level reporting that management has wanted but has not built?

1 2 3 4 5 6 7 8 9 10

Funding Rd. / M&A / Audit / Go-to-Market