

## Assess

### Internal

- Analysis & Audit
- Primary Research (Interviews)

Management

Trusted advisors/stakeholders

Products/Services

Costs/margins/profitability

Financial overview

Sales/Marketing strategy

R&D/Technical/NPD

Customer Service

Operations

Competitive environment

## Engage

### Internal

- Analysis Tools
- Primary Research (Interviews)

Growth Questionnaire

Innovation culture survey

Organizational/Company structure

Business style evaluations

Cross-functional relationships

Niche opportunities

## Synthesize

### External

- Primary Research
- Secondary Research

Customer Interviews

Lost customer interviews

TCP (prospect) interviews

Key external relationships

- Partners
- Suppliers
- Others

Competitive environment

## SmartGrowth Assessment Report

- Observations
- Recommendations
- Priorities