

# WERTZ & COMPANY<sup>LLP</sup>

Client Centered Professional Services  
Audit ♦ Tax ♦ Consulting ♦ Financial Services

## Best Practice – Assessment Tool for Entrepreneurial Companies

### Background

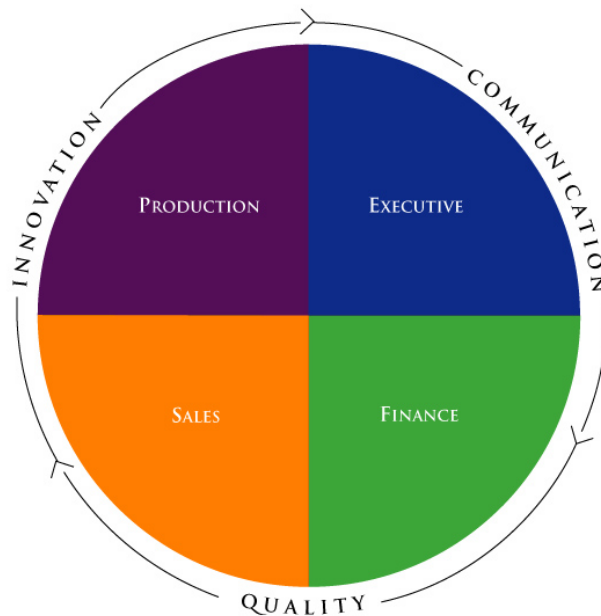
Entrepreneurs share many of the same characteristics – they are risk takers, they crave independence, they are free thinkers and visionaries, they have passion for their company and their causes, and they seek to control their own destiny. At Wertz & Company, we specialize in serving this diverse and divergent group.

### Driving the Business

One of the first and most important pieces of advice we impart to our entrepreneurial clients is that they need to take time to work “on” their business as opposed to simply “in” it. Too often the business grows and begins to drive the entrepreneur instead of the other way around. At a minimum, we recommend annual assessment and strategic planning meetings with the company’s advisory board and management teams. If there is not advisory board in place, start one utilizing your professional service providers (i.e. CPA, attorney, and banker).

### Ideal Enterprise

One of the most effective tools we use in these meetings is an assessment tool we developed called the “Enterprise Design Model”. This Model “componentizes” the major functional areas present in all businesses – large and small regardless of industry. The key to successfully managing the growth of your business is in keeping these functional areas in balance.



For more information about how the “Enterprise Design Model” can be applied in your business, contact Russ Wertz at (949) 756-5000 or [rwertz@wertzco.com](mailto:rwertz@wertzco.com).