CMG FINANCIAL SOLUTIONS™

Building Better Businesses

CMG 360 Assessment™
Certification Study Guide

The complete course reference: learning objectives, teaching content, and review questions for all ten modules, leading to the certification exam.

How to use this study guide

This guide is the reference for the CMG 360 Assessment Certification Program. It follows the ten modules of the syllabus in order. Each module opens with its learning objectives, works through the material, and closes with review questions that mirror the style of the certification exam.

Work the modules in sequence. Module 1 orients you to the assessment. Module 2 explains how the platform actually works, its process, its integrity, and the security of the information a client enters. Modules 3 and 4 cover the principles the platform rests on, Modules 5 through 7 build the diagnostic and the deliverable, Module 8 covers reading and using the output, Module 9 applies the method across industries, and Module 10 covers the limits, responsible use, and professional conduct the credential requires. Answer the review questions at the end of each module before moving on, then check yourself against the answer key at the back of the guide.

The certification exam is a single objective, unsupervised, timed exam of 100 points, requiring 80 percent to pass. Every question is applied. Studying this guide with that in mind, reading for how to use the method rather than how to recite it, is the best preparation.

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Frequently Asked Questions

Answer Key

Module 1 Introduction to the CMG 360 Assessment™ 6 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

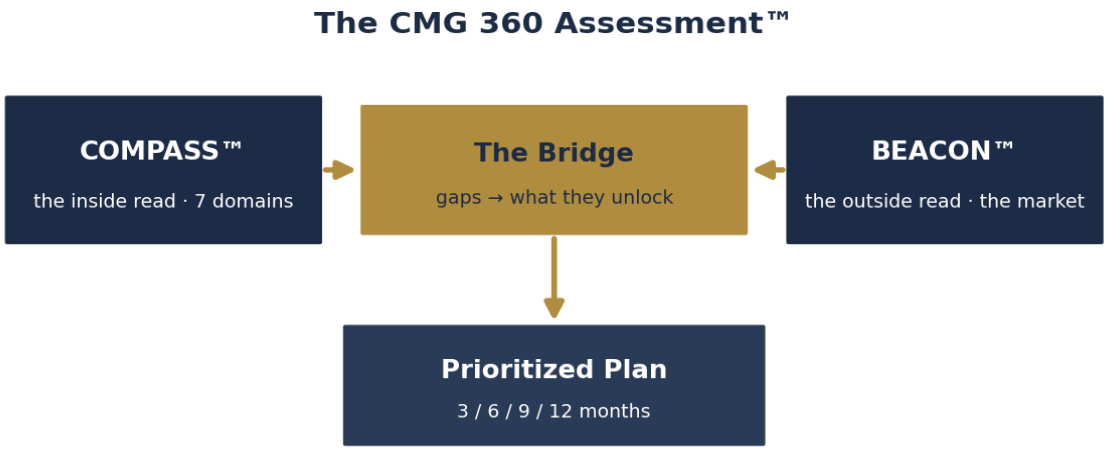
- Describe what the CMG 360 Assessment™ is and the problem it solves
- Preview the two guiding principles: Random Excellence™ and Context-Aware Diagnostics™
- Preview the two engines: COMPASS™ inside and BEACON™ outside, and the benchmarking that grounds them
- Explain why all of this matters to a business owner and what the owner gains from it

What the CMG 360 Assessment is and why it exists

At its core, the CMG 360 Assessment is a gap diagnostic. Two perspectives, one strategy: it reads a privately held business from the inside and the outside, benchmarks it against companies of similar size in its industry, and measures the gap between where it stands today and where a world-class company in its field would be. It looks inside through COMPASS, a diagnostic across seven domains, and outside through BEACON, a market assessment grounded in sourced research. The two are joined by the Bridge, which ties each internal gap to what closing it would unlock in the market, and the whole assessment resolves into a prioritized plan across 3, 6, 9, and 12 months.

It exists because most owners of companies in the $5M to $100M range are running with an incomplete instrument panel. They know their business intimately from the inside but rarely have an honest, benchmarked measure of where they stand against their industry peers, and they almost never have that placed against the market they compete in. The CMG 360 Assessment gives them both in one document, in language they can act on.

PART	ROLE IN THE ASSESSMENT
COMPASS™	The inside assessment: a diagnostic across seven domains
BEACON™	The outside assessment: the market and the competitive landscape
The Bridge	Ties each internal gap to what closing it unlocks in the market
The Plan	A prioritized roadmap across 3, 6, 9, and 12 months



The two engines meet at the Bridge and resolve into a prioritized plan.

A gap diagnostic: the company against world-class companies

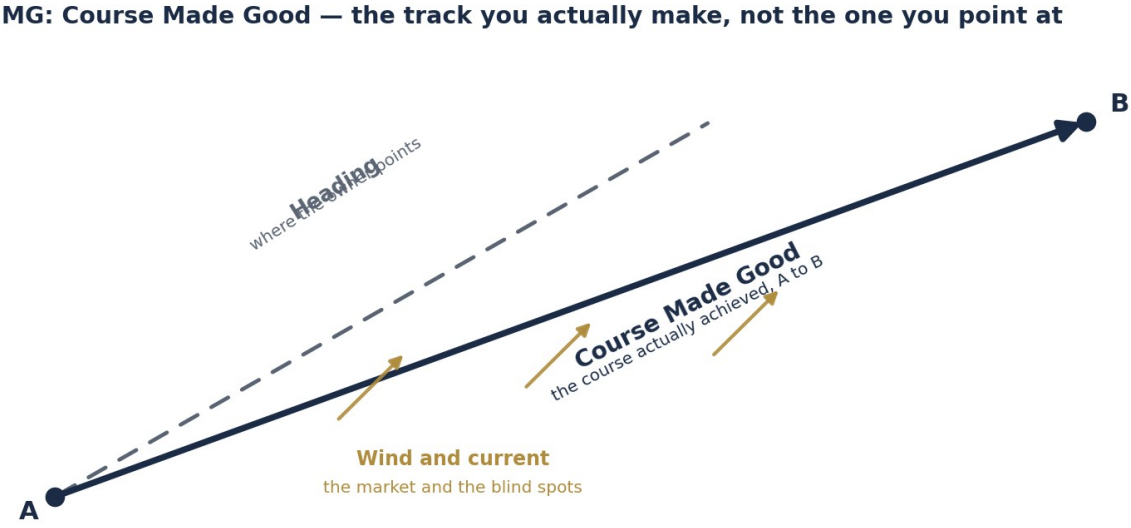
The through-line of the assessment is the gap. Every part of it is built to find and size the distance between how this company performs and how world-class companies in the same market perform. Some of those gaps are financial: a margin, a turn, or a ratio that sits below what the best operators in the sector achieve. Others are not: a weak sales process, thin planning, key-person risk, or systems that will not scale. The assessment measures both kinds against a world-class standard, not against the owner's own sense of the business.

This matters because the gap an owner cannot see is the one most likely to cap the company. Naming the gaps in plain, benchmarked terms turns a vague sense that something could be better into a specific, sized, and prioritized list: where the company trails the best in its market, by how much, and what it would take to close the distance. Everything that follows in this guide, the diagnostic, the benchmarking, the market assessment, and the Bridge, exists to produce that list.

What CMG means

CMG stands for Course Made Good, a term from navigation. A boat's heading is the direction it points. Its course made good is the track it actually achieves between two points once wind and current have had their say. The two are rarely the same, because wind and current push a boat off its heading, and course made good is the honest measure of where the boat is really going.

The name is deliberate. An owner sets a heading, the goals and direction they intend for the business. The market, and the blind spots inside the company, are the wind and current that push them off it. What matters is not the heading the owner points at but the course the company is actually making, and whether it will reach point B. The CMG 360 Assessment measures that real course. It shows the owner the drift between where they meant to go and where they are actually headed, which is another way of describing the gap, and it sets a corrected course to close it.



Course Made Good is the track a boat actually achieves once wind and current act on its heading.

This is why the whole system carries navigation names. Finding True North™ is the direction. COMPASS™ is the inside assessment. BEACON™ is the outside assessment. Course Made Good, CMG, is the firm that keeps a company on the track that actually reaches its destination.

The two guiding principles, previewed

Two principles run underneath everything. The first is Random Excellence: every business is well versed in some areas and not in others, and the weaker areas are usually the ones the owner is least aware of. This is why the assessment reads all seven domains rather than grading a company on its highlights.

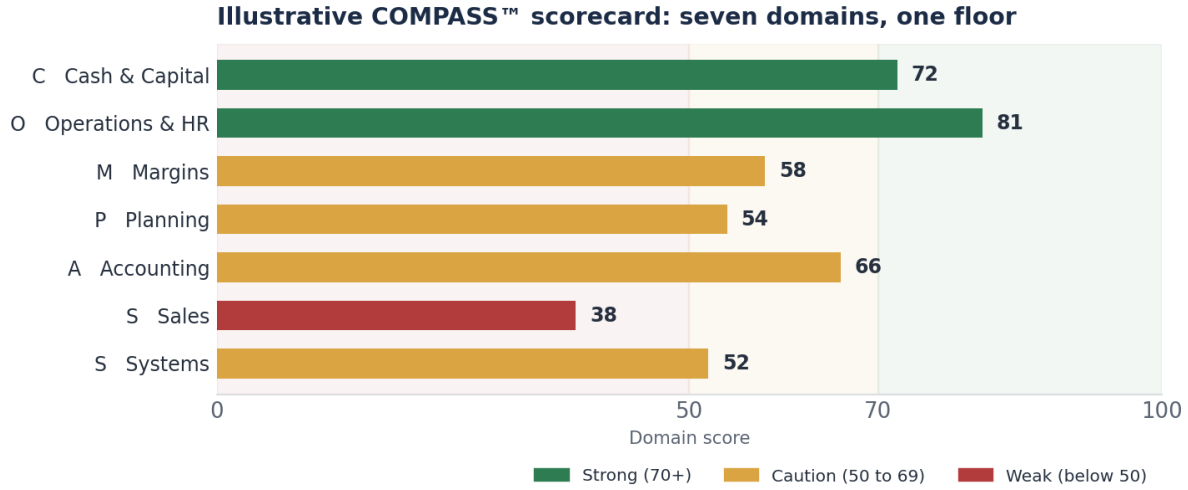
The second is Context-Aware Diagnostics: the same score means different things depending on where the company sits in its lifecycle, the market it competes in, and the owner's own goals, aspirations, concerns, and curiosities. Modules 3 and 4 develop both principles in full.

COMPASS in detail: the inside assessment

COMPASS is the inside assessment, and its name is not decoration. The seven letters are the seven domains, in order, and together they spell the instrument that keeps an owner oriented. Reading all seven is the point: the domain that limits a company is rarely the one the owner is watching.

	DOMAIN	WHAT IT MEASURES
C	Cash & Capital	Liquidity, working capital, debt, and the ability to fund the business
O	Operations & HR	Structure, roles, key-person risk, and how the work gets done
M	Margins	Pricing, revenue quality, and the drivers of profit
P	Planning	Goal-setting, accountability, and turning plans into results
A	Accounting	The quality and timeliness of the numbers the company runs on
S	Sales	Demand generation, the funnel, customers, and how the company wins work
S	Systems	The tools and processes that let the business scale

Each domain is scored on its own, and the seven are read together. A finished COMPASS assessment looks like the scorecard below, where the bands, strong, caution, and weak, translate a fine score into the plain assessment an owner needs.



A COMPASS™ assessment shows all seven domains at once. The discipline is to lead with the floor, here Sales, not the average.

BEACON in detail: the outside assessment

BEACON is the outside assessment, and it is far richer than a market size. Where COMPASS reads the inside of the business, BEACON reads how the company meets its market. It draws heavily on the substantial information the client provides about their own go-to-market, gathered through a focused set of about 22 questions, and it reads that against the market the company competes in. A well-run company aimed at a shrinking market and a rough company sitting in front of a large one need very different advice, and only the outside assessment reveals which one you are looking at.

The point is that BEACON does not just ask how big is the market. It asks how well this company is positioned to take a share of it, given the product it sells, the price it charges, the capacity it can deliver, the scale it operates at, and the geography it can reach. Those go-to-market factors are what turn a raw market size into a realistic opportunity.

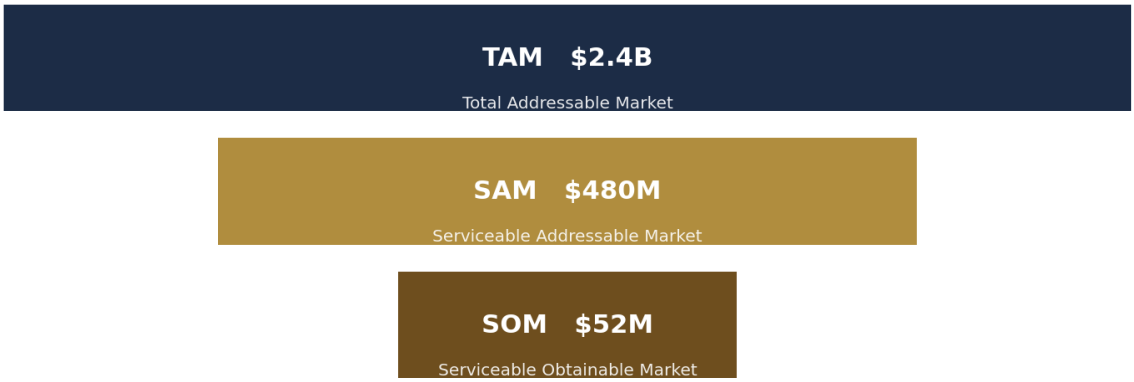
DIMENSION	WHAT BEACON EXAMINES
Product	What the company sells and how it is differentiated
Pricing	How the company prices, and how that sits against the market
Capacity	How much the company can deliver, and the ceiling that puts on growth
Scale	The company's size relative to the market and its competitors
Geography	Where the company can serve, and where it cannot
Market size	The opportunity at three levels: TAM, SAM, and SOM
Competition	Who else contests the same work, and where the open ground is

BEACON is delivered as a named set of sections, and it lives on sourcing. Every figure rests on stated assumptions and cited sources, built bottom-up from real units and prices rather than from a headline industry number.

SECTION	WHAT IT DELIVERS
Client Profile	The company, its offering, and how it goes to market
TAM	Total addressable market: everything the offering could serve
SAM	Serviceable addressable market: the portion realistically reachable given capacity and geography
SOM	Serviceable obtainable market: the share winnable given pricing and scale
Market Summary	The market's shape, direction, and competitive landscape
Assumptions and Sources	The stated assumptions and citations behind every figure
Strategic Recommendations	Where the opportunity points the company
How to Use	How to read and apply the assessment

At the center of BEACON is the market sizing, done at three levels. The go-to-market factors above are what move a company from the total market down to the slice it can realistically serve and win: capacity and geography narrow the total market to what is serviceable, and pricing and scale narrow that to what is obtainable.

BEACON™ market sizing: TAM, SAM, SOM (illustrative, built bottom-up)



Capacity and geography narrow the total market to what is serviceable; pricing and scale narrow that to what is obtainable.

Benchmarking, financial and otherwise

Benchmarking is how the gaps get measured. The assessment compares the company's financial and operating characteristics against companies of similar size in its industry, and measures the gap to where a world-class company in its field would be. On the financial side, two years of the company's financials are read against industry data drawn from NAICS and RMA sources, so a margin or a ratio is never judged in a vacuum but against what similar-size peers, and the best operators, in the sector actually achieve. The distance between the company and the world-class standard is the financial gap the assessment reports.

Benchmarking is not only financial. The operating characteristics of the business, how it is organized, how it plans, how it sells, and how it runs, are read against how world-class companies in the same field operate. That is how the non-financial gaps are found. Every score is really a statement about a gap: how far this company sits from world-class for its field.

There is a second axis to benchmarking, and it is just as useful. A company can also be benchmarked against itself over time. Running the assessment again at intervals shows whether the gaps are closing, holding, or widening, which turns a one-time diagnosis into a way to measure progress. The external comparison, against world-class, tells an owner how far they have to go. The internal comparison, against their own prior results, tells them whether the work they are doing is actually moving the numbers.

Why it matters to the owner

For the owner, the payoff is threefold. First, clarity on the blind spot, the domain that is quietly capping the business, stated plainly and backed by benchmark data rather than opinion. Second, priorities that move the needle, a sequenced plan that spends the owner's limited attention on the few things that matter most rather than a long undifferentiated list. Third, a higher multiple.

The value of a privately held company is a score, not luck, and the assessment shows the owner exactly which gaps are holding the score down and what closing them is worth. This is the argument a certified advisor makes, and the rest of this guide equips you to make it.

Review questions

1. The CMG 360 Assessment reads a company from which two directions?

- **A.** Top-down and bottom-up

   B. Inside (COMPASS) and outside (BEACON)
   C. Historical and projected
   D. Financial and legal

2. Random Excellence holds that:
   A. Excellence happens purely by chance
   B. Every company is strong in some areas and weak in others, and the weak areas are usually least visible to the owner
   C. Only great companies are excellent
   D. Companies should focus only on their strengths

3. Context-Aware Diagnostics means:
   A. Scores are fully automated
   B. The same score can mean different things depending on lifecycle, market, and owner intent
   C. Context is added only after scoring
   D. Only the market matters

4. Financial benchmarking in the assessment compares company financials against:
   A. The prior year only
   B. A competitor's public filings
   C. NAICS and RMA industry data
   D. The owner's targets

5. The three benefits to the owner are clarity on the blind spot, priorities that move the needle, and:
   A. A lower tax bill
   B. A higher multiple
   C. More staff
   D. A new CRM

Module 2 How the CMG 360 Assessment™ Works 8 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

- Walk a client through the end-to-end process of the CMG 360 Assessment™, from intake to delivered report
- Describe how the platform administers the diagnostic, computes the benchmarks, and generates the output
- Explain the inherent integrity of the system: standardization, sourcing, and the no-fabrication standard
- Explain to a client how their information is handled, protected, and kept confidential

The end-to-end process

The CMG 360 Assessment is produced on a platform, and a certified advisor must be able to walk a client through every step of how it works. The process runs in a fixed sequence. It begins with intake, where the advisor captures the company's profile and the three context layers: lifecycle stage, market, and the owner's goals, aspirations, concerns, and curiosities. This context is entered first because it shapes how everything that follows is read.

Next comes the COMPASS diagnostic. The company answers the 160-question instrument across the seven domains, on the platform. Alongside the diagnostic, two years of the company's financials are entered so they can be benchmarked. The platform benchmarks those financials against NAICS and RMA industry norms and combines the benchmark with the diagnostic answers to produce a score for each domain.

In parallel, the advisor builds the BEACON assessment from sourced, bottom-up research. Finally, the platform and advisor assemble the standard CMG 360 Assessment: the COMPASS table, the financial highlights, the BEACON summary, the Bridge, and the prioritized plan, in the standard format. The finished assessment is delivered to the owner.

The platform is a modern, US-hosted cloud application. The diagnostic and reporting run on managed cloud infrastructure, the data is held in a US database, and report generation and the market work are AI-assisted. A certified advisor does not need to be an engineer, but should understand this shape well enough to describe it plainly to a client.

STEP	WHAT HAPPENS
1. Intake	Capture the company profile and context: lifecycle, market, and the owner's goals, aspirations, concerns, and curiosities
2. COMPASS™ diagnostic	The company answers the 160-question instrument across the seven domains
3. Financials	Two years of financials are entered, as the company keeps them, for benchmarking
4. Benchmarking	The financials are read against companies of similar size in the industry
5. BEACON™	The client answers the go-to-market questionnaire; the market is sized and mapped from sourced research
6. Assembly	COMPASS, BEACON, the Bridge, and the plan are assembled into the standard CMG 360 Assessment
7. Delivery	The finished assessment is delivered and walked through with the owner



The same sequence runs for every engagement.

What the intake captures

The intake is a structured package the client completes, and it is where the quality of the whole assessment is decided. It moves through nine sections, from a confidentiality acknowledgment, through the company profile, the owner's own words, the financials, and the market, to the 160-question diagnostic and a final summary the client sends to CMG.

A certified advisor should know this structure cold, because it maps directly to the two engines: the owner questions and curiosity set the context, the market sections feed BEACON, the financial documents and the diagnostic feed COMPASS, and every part is confidential from the first screen.



Illustrative view based on the live landing page

Illustrative view of the platform entry. Real screenshots can be dropped in when exported.

INTAKE SECTION	WHAT IT CAPTURES AND FEEDS
Confidentiality & Non-Disclosure	The client acknowledges a confidentiality statement before beginning
Company Information	The company profile: legal name, NAICS, revenue, employees, ownership, and contacts
The Five CMG Owner Questions	What is on the owner's mind: the challenge, the decision, the concerns, and the plans
Owner Curiosity	What the owner most wants to understand, so the report leads with it
Financial Requirements	The financials that feed the benchmarking; P&L and balance sheet

INTAKE SECTION	WHAT IT CAPTURES AND FEEDS
	required, tax returns optional
Markets the Company Serves	The market facts that feed BEACON: product, geography, customers, competitors, share
Market Nuances	The market context that feeds BEACON: pricing, trends, barriers, what customers value
COMPASS Diagnostic	The 160-question, seven-domain assessment, answered YES, NO, or N/A
Engagement Summary	Review the responses and generate the package to send to CMG

A consistent, repeatable result

A central strength of the platform is that the same inputs produce the same output. The instrument is standardized, so every company answers the same 160 questions. The scoring is standardized, so the same answers and the same benchmarked financials resolve to the same domain scores. The format is standardized, so every assessment follows the same structure.

This is what makes certification possible at all. Two certified advisors running the same company through the platform arrive at the same assessment, because the platform, not the advisor's opinion, produces the score. The advisor's judgment goes into context, interpretation, and recommendations, but the underlying diagnostic is consistent by design. That consistency is a selling point with clients: the assessment is not one consultant's take, it is a repeatable measurement. It is also what lets a company benchmark against itself over time. Because the instrument does not drift, a later assessment is directly comparable to an earlier one, and the difference between them is real progress rather than a change in method.

How the platform uses AI, and why the results do not drift

A fair question, from advisors and clients alike, is how a platform that uses AI can be trusted to give consistent, accurate results rather than a different answer every time. The design answers this in layers, and a certified advisor should be able to explain it plainly.

First, the measurements do not come from the AI. A domain score is the share of applicable questions answered YES, computed by rule. The benchmark comparison is arithmetic against industry data. The market sizing follows a fixed, bottom-up method. These are deterministic: the same inputs produce the same numbers every time, because no judgment or generation sits between the input and the score.

Second, the AI works inside a fixed structure, not on a blank page. It is given the scored diagnostic, the financials, the benchmark results, and the client's own answers, and asked to express and connect them in the standard report format. It is not asked to decide the scores or invent the facts; it articulates findings the data has already determined. Strict guardrails hold it to that data: it may not fabricate a number or a source, BEACON figures must trace to sourced research, COMPASS findings must trace to the diagnostic, and where data is missing the assessment says so.

Third, how the inputs reach the AI is itself a defined, proprietary process. The scored diagnostic, the financials, the benchmarks, and the context are assembled and presented in the same structure every time, so the AI reads a standardized, complete picture rather than improvising from loose notes. This structuring is a core part of the CMG method, and it is much of why the same inputs yield

the same response. The AI is not asked an open question; it is handed a consistent package and asked to render it.

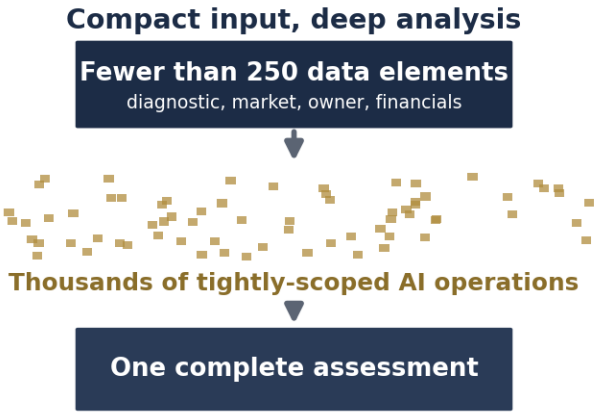
The platform also uses AI in the other direction: to establish the standard the company is measured against. Drawing on what world-class and successful companies in the same market actually do, it frames the benchmark for the operating characteristics, the practices a top performer has in place, so the assessment reads the company against the best in its field rather than a generic average. The measurement stays deterministic; what AI contributes is a current, market-specific picture of what good looks like.

There is a further point worth understanding, because it surprises people. The client provides a compact set of inputs, fewer than 250 data elements in all: the diagnostic answers, the market answers, the owner's questions, and the financials. Yet the platform touches AI thousands of times over the course of a single assessment. It does not hand the whole picture to the AI once and ask for a report. It breaks the work into thousands of small, tightly-scoped operations, reading each element, cross-referencing it against the others, checking the financials against the diagnostic, researching and validating each market figure, and drafting and refining each part of the output.

Decomposing the work this way is deliberate, and it is central to both accuracy and consistency. A large, open-ended request gives an AI room to wander; a narrow one, with a single small job and the data in front of it, does not. Thousands of constrained calls, each doing one thing, produce a result that is both deeper than the compact input would suggest and steady from one run to the next. It is also why a short questionnaire can yield an assessment with real analytical depth.

Ultimately, this is what makes the assessment context-aware in the fullest sense. Because the work is broken down and then drawn back together, every diagnostic answer and every financial scenario is considered in the context of all the others, not in isolation. A weak Cash Flow score is read against the margin picture, the customer concentration, the owner's stated plans, and the market's direction all at once. The platform is not scoring seven separate domains and a market in parallel; it is weighing how each finding bears on the rest, which is how it arrives at the most complete perspective the inputs allow, and how it surfaces the connections a domain-by-domain read would miss.

PART OF THE ASSESSMENT	WHY IT DOES NOT DEVIATE
Domain scores	Computed by rule from the YES, NO, and N/A answers; identical inputs give identical scores
Benchmark comparisons	Arithmetic against industry data, with no judgment between the number and the result
Market sizing	A fixed, bottom-up method applied to the client's answers and sourced data
How inputs reach the AI	Packaged in the same proprietary structure every time, so the AI reads a standardized picture, not loose notes
Narrative and insights	Expressed with AI, but held to the scored data, the sourced research, and the standard format, with no fabrication



A compact set of inputs is analyzed through thousands of small operations, then drawn back into one assessment.

The result is an assessment whose substance does not drift. Run the same company through the platform twice and the scores, the benchmarks, and the conclusions are the same. That is what lets a company benchmark against itself over time, and it is what a certified advisor can tell a client with confidence: the CMG 360 Assessment is a repeatable measurement, not a fresh opinion each time it is run.

The inherent integrity of the system

The platform rests on a small set of firm standards that a certified advisor must understand and be able to defend. First, COMPASS scores come from the actual diagnostic. A score is never estimated or eyeballed; it is produced by the instrument from real answers and real financials.

Second, BEACON requires sourced, bottom-up research. Market figures rest on stated assumptions and cited sources, never on invention. Third, the financial benchmarks are drawn from real NAICS and RMA industry data, not from memory or approximation.

Fourth, and above all, there is no fabricated output. The platform does not generate a plausible-looking number to fill a gap. If the data is not there, the assessment says so. This is the guardrail that protects the client and the CMG brand, and it is the heart of why the assessment can be trusted.

Security of information entered into the platform

Clients entrust the platform with sensitive information: their financials, their candid answers about the state of their business, and the owner's private concerns. A certified advisor must be able to speak to how that information is protected, and to answer, in plain terms, the questions an owner will ask. Where does my data go? Who can see it? Is it encrypted? The platform's protections are summarized below.

AREA	HOW INFORMATION IS PROTECTED
Encryption	AES-256 at rest and TLS in transit
Access control	Row-level security plus server-side ownership checks; a consultant sees only their own records
Tenant isolation	Every record carries a tenant identifier; the database enforces access only to your own tenant's data
Hosting and residency	Hosted and processed entirely in the United States; all client data is stored in the US

AREA	HOW INFORMATION IS PROTECTED
Authentication	Email and password with cookie-based server-side sessions
Backups	Daily automated backups with roughly seven-day retention; point-in-time recovery available

The platform is US-hosted and US-processed. All client data is stored in the United States, and all processing occurs in the United States. There is no EU or region-pinned option at present.

Explaining the strengths and integrity to a client

Certification exists so that every advisor using the platform can explain, confidently and accurately, why the CMG 360 Assessment can be trusted. The talking points are consistent. The assessment reads the whole company, not just its strengths. It is benchmarked against real industry data, not opinion. It produces a consistent, repeatable result rather than one consultant's take. It never fabricates a number. And it protects the information a client enters.

An advisor who can say all of this plainly, and mean it, is what the credential certifies. The rest of this guide gives you the depth behind each of these claims.

Review questions

1. The CMG 360 Assessment process begins with:
   - **A.** Running the COMPASS diagnostic
   - **B.** Intake and context capture
   - **C.** Building the BEACON assessment
   - **D.** Delivering the report
2. Why do the same inputs produce the same output?
   - **A.** The advisor decides the score
   - **B.** The instrument, scoring, and format are standardized
   - **C.** Every company is scored differently
   - **D.** The platform randomizes results
3. COMPASS scores are:
   - **A.** Estimated by the advisor
   - **B.** Produced by the actual diagnostic from real answers and financials
   - **C.** Set by the owner
   - **D.** Copied from the benchmarks
4. The no-fabrication standard means:
   - **A.** Estimates are always avoided
   - **B.** The platform never generates a number to fill a gap; if data is missing, the assessment says so
   - **C.** Only the advisor writes the numbers
   - **D.** Sources are optional
5. When a client asks about data security, a certified advisor should:
   - **A.** Reassure them that everything is completely secure
   - **B.** State accurately what the platform does and point deeper questions to CMG's security documentation
   - **C.** Decline to answer
   - **D.** Say only that it is confidential
6. How does the platform stay consistent despite using AI?

A. It runs the AI many times and averages the results

B. The scores and benchmarks are computed by rule, and the AI is held to the data rather than free to invent

C. It avoids AI entirely

D. The advisor rewrites each result by hand

7. Although a client provides fewer than 250 data elements, the platform:

A. Makes a single AI request per assessment

B. Breaks the work into thousands of small, tightly-scoped AI calls, which deepens the analysis and holds it steady

C. Uses no AI for analysis

D. Requires thousands of client inputs

Module 3 Random Excellence™ 8 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

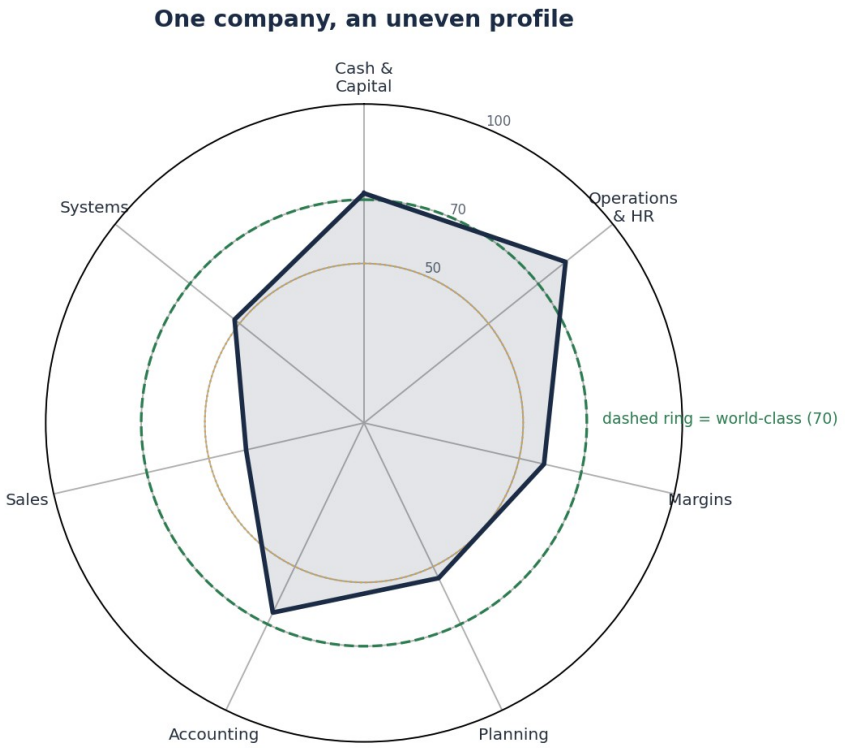
- Explain Random Excellence™: why competence is uneven across a business
- Show how Random Excellence™ is the basis for the COMPASS™ acronym and its seven domains
- Distinguish outcome from process, and score from luck
- Use the navigation metaphor consistently in client language

The principle: uneven competence

Random Excellence is the observation that competence inside a company is uneven. A business is genuinely good at some things and genuinely weak at others, and the pattern is rarely deliberate. It is the residue of the founder's strengths, the people who happened to be hired, the crises that were survived, and the areas that never got attention because nothing forced them to.

The word random points at this. Excellence shows up where the company's history happened to build it, not where a plan placed it. That is why a company can be world-class in one domain and barely functional in another sitting right beside it. And it is why the assessment reads every domain: a company moves at the speed of its worst domain, not its best.

A COMPANY CAN BE WORLD-CLASS AT...	AND QUIETLY FAILING AT...	WHY THE OWNER MISSES IT
Winning new work	Collecting and holding cash	The pipeline looks healthy, so no one studies the cash cycle
Running production	Planning and accountability	The floor hums, so the absence of a plan feels fine until growth stalls
Its founder's product genius	Building a team that does not depend on the founder	The founder's strength hides the key-person risk it creates



The same company is world-class in some domains and weak in others. The floor, not the average, is what caps it.

Why owners are the last to see it

The uneven pattern would be harmless if owners saw it clearly, but they usually do not, and the reason is human. Attention flows to strength. An owner who built the business on winning work watches the pipeline; an owner who came up through operations watches the floor. The domain that gets the least attention is the one the owner is least equipped to judge, which is exactly where the gap tends to grow.

This is why the assessment does not ask the owner to rate themselves and stop there. It measures every domain against an outside standard, precisely because the owner's confidence is an unreliable guide to where the company is actually weak. The blind spot is not a failure of intelligence; it is a predictable consequence of where the owner's attention has always gone.

Why it drives COMPASS to read all seven domains

If competence were uniform, you could sample one part of a business and infer the rest. Because it is uneven, you cannot. A company with a superb sales engine can be quietly failing at cash management, and the owner, watching the strong sales numbers, will be the last to see it.

This is why COMPASS reads all seven domains rather than grading the company on its best work. The domain that limits the business is usually not the one the owner is proud of. Reading every domain is the only way to find the one that is holding the rest back.

Roots in Finding True North

The principle is developed in Finding True North, where the COMPASS acronym first appears. The book's argument is that owners drift because they navigate by the instruments they trust and ignore the ones they do not, and that finding true north requires reading the full panel.

Random Excellence is the diagnostic expression of that argument. It turns a navigational idea into a rule for how to assess a company: read everything, weight nothing by the owner's confidence, and let the weakest domain speak.

Outcome versus process; the multiple is a score, not luck

A related discipline is separating outcome from process. A good year can come from a strong process or from a lucky market, and only one of those repeats. The assessment looks past the outcome to the process that produced it, because an owner who mistakes luck for skill will be blindsided when the market turns.

The same logic applies to valuation. The multiple a company earns at sale is not luck. It is a score, and the score reflects the very domains COMPASS measures. Naming that plainly reframes the owner's work from hoping for a good number to earning one.

The navigation brand

Random Excellence sits inside a consistent set of navigation ideas that a certified advisor should use fluently. Finding True North is the direction. COMPASS is the inside assessment. BEACON is the outside assessment. The Bridge joins them, and the CMG 360 Assessment is the finished chart.

Using this language consistently is not decoration. It gives the owner a single coherent metaphor for a complex diagnostic and makes the findings easier to hold and act on.

Review questions

1. “Random” in Random Excellence refers to:

- **A.** Random sampling of the business
- **B.** Excellence appearing where a company's history built it, not where a plan placed it
- **C.** Random scoring of domains
- **D.** Luck in the market

2. Why does COMPASS read all seven domains?

- **A.** To be thorough for its own sake
- **B.** Because competence is uneven, so the limiting domain is usually not the visible strength
- **C.** Because a regulator requires it
- **D.** To make the report longer

3. Separating outcome from process matters because:

- **A.** Process is easier to measure
- **B.** A good outcome can come from luck or skill, and only skill repeats
- **C.** Owners prefer process
- **D.** Outcomes are unreliable data

4. “The multiple is a score, not luck” means:

- **A.** Multiples are random
- **B.** Valuation reflects the same domains COMPASS measures and can be earned
- **C.** Only luck sets valuation
- **D.** Scores do not matter at sale

5. In the navigation brand, BEACON is:

- **A.** The inside assessment
- **B.** The direction
- **C.** The outside assessment of the market

D. The finished chart

Module 4 Context-Aware Diagnostics™ 10 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

- Explain why the same score means different things in different situations
- Apply the three context layers: lifecycle stage, market, and owner intent
- Capture the owner's goals, aspirations, concerns, and curiosities and let them shape the reading
- Show how the owner's concerns and curiosities change the way a benchmark gap is read and prioritized
- Turn context into a tailored assessment rather than a generic scorecard

The principle: a reading is only as good as its context

A score with no context is a number, not a diagnosis. Context-Aware Diagnostics is the principle that every reading must be interpreted against the situation that produced it. The same domain score can be a strength or a warning depending on where the company is in its life, what market surrounds it, and what the owner is trying to do.

The certified advisor's job is not to read the number but to read the number in context.

Lifecycle stage

Where a company sits in its lifecycle changes what a score means. A young, fast-growing company is expected to be thin on systems and process, and a low Systems and Technology score there is a normal growing pain. The same score in a mature company that has plateaued is a red flag, because it points to years of underinvestment that are now capping the business.

Reading lifecycle first keeps the advisor from raising alarms that are really just the company's stage, and from missing alarms that the stage should have outgrown.

The market layer

The market a company competes in colors every internal score. A margin that looks weak in isolation may be strong for a commoditized, high-volume sector, and a margin that looks healthy may be poor for a specialized niche.

The market layer is where COMPASS meets BEACON. You cannot judge the inside assessment fairly without the outside assessment that tells you what normal looks like in this specific arena.

Owner intent: goals, aspirations, concerns, curiosities

The third layer is the owner, and it is the one that most changes the reading. Four things shape it. Goals are what the owner is working toward, concrete and often time-bound: to sell the company in three years, to move it into an employee stock ownership plan, to buy a new warehouse, to expand into a new geography, or to enter a new market. Aspirations are the larger ambitions behind those goals, what the owner would pursue if the path were clear. Concerns are what keeps the owner up at night: a softening economy, a shift in the market, a concentrated customer, and very often financing, securing a line of credit, refinancing debt, or staying clear of a covenant they are close to breaching. Curiosities are the open questions the owner is turning over but has not resolved, often the seed of the next goal.

These are captured at intake, and they steer the entire assessment. The same set of scores means different things depending on what the owner is trying to do. An owner heading for a sale needs the gaps that depress a multiple surfaced first. An owner planning an ESOP needs cash flow and

reporting rigor read against that structure. An owner about to buy a warehouse or push into a new geography needs capacity, capital, and the market opportunity weighed against the move. The assessment does not just grade the company; it grades the company against the thing the owner is actually trying to do.

IF THE OWNER'S GOAL IS...	WHAT THE ASSESSMENT SHARPENS
Sell in three years	The gaps that hold down the multiple, and what closing them is worth at exit
Move the company to an ESOP	Cash flow durability, reporting rigor, and the value the structure will rest on
Buy a new warehouse	Capacity, capital and cash flow, and whether the move is timed to the market
Expand into a new geography	The serviceable market in the new area, the capacity to reach it, and go-to-market fit
Enter a new market	Product fit, the competitive landscape, and the obtainable share BEACON™ can size
Weather a soft economy	Cash, working capital, margin resilience, and customer concentration
Secure a line of credit or refinance	The metrics a lender underwrites: cash flow, leverage, working capital, and reporting quality
Stay clear of a loan covenant	The ratios the covenant tests, the headroom left, and the trend heading toward or away from a breach
Get ahead of a market trend	Where the market is heading, from BEACON™, and whether the company is positioned for it

The same discipline applies to concerns. An owner worried about a soft economy, a turning market, or a financing deadline is not asking for a generic scorecard; they want the assessment read through that worry. For a financing concern, that means leading with the metrics a lender underwrites and the covenant ratios the company is measured against. Context is not a preface to the assessment. It is what decides which findings lead.

How concerns and curiosities reframe a benchmark

This is the mechanic to understand well. A benchmark gap does not carry its own priority. The owner's concerns and curiosities assign it one.

Suppose the company's margin sits three points below the NAICS benchmark. For an owner whose concern is cash and survival, that gap is an urgent finding tied directly to the thing they fear. For an owner whose curiosity is whether the business could support a roll-up, the same gap is a strategic input into a different question. The number is identical. The finding, and where it lands in the plan, is set by the context the owner brought.

Context shaping the assessment and the platform's questions

Because context drives interpretation, it also shapes the assessment itself. The intake opens with the Five CMG Owner Questions, which ask, in effect, what is on your mind. They are open questions, answered in the owner's own words, and they frame the entire engagement before a single diagnostic question is asked.

THE FIVE CMG OWNER QUESTIONS	WHAT IT DRAWS OUT
What is your biggest financial challenge right now?	The pressing pain: cash flow, margins, debt, profitability, working capital, the bank relationship
What business decision are you trying to make?	The decision in front of the owner: growth, hiring, acquisition, exit, buyout, new market, capital raise
What concerns you most about the next 12 months?	What keeps the owner up at night: competition, customer concentration, labor, market, key-person risk
What are your growth or exit plans?	Where the owner is trying to go: revenue targets, geographic expansion, acquisition, sale, ESOP, transition
Is there anything else we should know about your situation?	Anything unique, sensitive, or important that does not fit the questions above

A separate Owner Curiosity section then captures what the owner genuinely wants to understand better, so the report can put the most wanted insights front and center. These are the questions that draw out the curiosities.

OWNER CURIOSITY (5 QUESTIONS)
What do you wish you understood better about your financial performance?
What operational area do you suspect is costing you money that you cannot fully explain?
What does your market opportunity actually look like? Are you capturing your fair share?
What would change in how you run the business if you had better data and visibility?
If you could know one thing about your business that you do not know today, what would it be?

What comes out of these questions, an exit in three years, a warehouse they want to buy, a covenant they are worried about, sets the lens for everything that follows. From there the platform captures the company profile, the market, and the financials, and those inputs influence which findings are surfaced and how recommendations are framed. A certified advisor treats intake not as paperwork but as the step that makes the rest of the diagnosis accurate. Skip it, and you produce a generic scorecard. Do it well, and you produce a diagnosis.

Review questions

1. Context-Aware Diagnostics says a score must be read against:
   - **A.** Last year's score
   - **B.** Lifecycle, market, and owner intent
   - **C.** The advisor's judgment alone
   - **D.** The exam rubric
2. A low Systems score in a young, fast-growing company is:
   - **A.** Always a red flag
   - **B.** Often a normal growing pain given the stage
   - **C.** Impossible
   - **D.** A scoring error
3. The market layer is where:
   - **A.** COMPASS meets BEACON
   - **B.** Intake ends

   - **C.** The plan is written
   - **D.** Benchmarks are ignored

4. The four elements of owner intent are goals, aspirations, concerns, and:
   - **A.** Constraints
   - **B.** Competitors
   - **C.** Curiosities
   - **D.** Capital

5. Two owners with the same margin gap get different findings because:
   - **A.** The benchmark changed
   - **B.** Their concerns and curiosities assign the gap a different priority
   - **C.** The score was wrong
   - **D.** Their markets differ

Module 5 COMPASS™ Diagnostic 14 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

- Name the seven COMPASS™ domains and what each measures
- Administer the 160-question diagnostic correctly
- Benchmark two years of company financials and operating characteristics against world-class companies in the same market
- Understand how the domain answers and the financial benchmark combine into a domain score
- Interpret domain scores and the floor-versus-ceiling reading
- Translate scores into findings an owner will act on

The seven domains

COMPASS reads a company across seven domains, and its letters are the domains in order. Cash & Capital covers liquidity, working capital, debt, and the ability to fund the business. Operations & HR covers structure, roles, key-person risk, and how the work gets done. Margins covers pricing, revenue quality, and the drivers of profit. Planning covers goal-setting, accountability, and whether plans turn into results.

Accounting covers the quality and timeliness of the numbers the company runs on. Sales covers demand generation, the funnel, the customer base, and how the company wins work. Systems covers the tools and processes that let the business scale. Each domain is scored on its own, and the set is read together. The table below shows what strength and a gap tend to look like in each.

DOMAIN	SIGNS OF STRENGTH	SIGNS OF A GAP
Cash & Capital	Predictable cash, working capital under control, funding on its own terms	Cash surprises, stretched payables, reliance on the line of credit
Operations & HR	Clear roles, depth behind key people, real accountability	Key-person risk, unclear ownership, work that cannot scale
Margins	Disciplined pricing, healthy and stable margins, quality revenue	Margin erosion, undisciplined discounting, unclear revenue quality
Planning	Goals set and met, plans that turn into results	Reactivity, missed goals, plans that never translate to action
Accounting	Timely, trusted numbers the business runs on	Late or unreliable numbers, decisions made on gut
Sales	A working funnel, repeatable demand, healthy customer mix	Lumpy revenue, no pipeline discipline, reliance on a few customers
Systems	Tools and processes that scale with the business	Manual workarounds, systems that will not scale, data trapped in silos

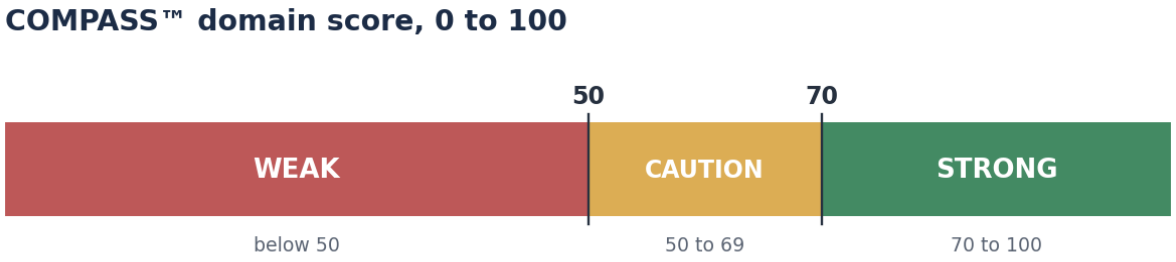
The 160-question instrument and what the scores mean

The diagnostic runs on a 160-question instrument spread across the seven domains. Each question maps to a practice that world-class companies in the field have in place, so a YES is not an opinion but a specific capability present or absent. Each question is answered YES, meaning the capability is fully in place, NO, meaning it is not in place or not yet, or N/A, meaning it does not apply. A domain score is the share of applicable questions answered YES, expressed on a 0 to 100 scale,

and it is really a count of how many world-class practices the company has in that domain. Every score falls into one of three bands, and the band, not the exact number, is what an owner needs to hear: this is solid, this needs watching, this is a problem.

The ranges are set so that the standard is world-class, not average. A strong score means most of the capabilities that define a world-class operator are in place. A caution score means the domain works but has real gaps. A weak score means most of those capabilities are missing, and it usually marks the floor the plan should lead with.

SCORE	BAND	WHAT IT MEANS FOR THE DOMAIN
70 to 100	Strong	At or near world-class for the market. A genuine strength to protect and build on
50 to 69	Caution	Functional but trailing the standard. A gap worth closing; watch the direction
Below 50	Weak	A material gap and a likely floor. Usually where the plan should begin



Every domain score falls into one of three bands, with the lines at 50 and 70.

Two disciplines follow from the ranges. First, a score near a band edge is read with its trend, since a 51 sliding toward the weak band is a different story than a 51 climbing away from it. Second, the overall picture is read by its floor, not by averaging the seven scores, because the weak domain is what caps the company no matter how strong the others are.

Financial benchmarking

Alongside the diagnostic answers, COMPASS benchmarks two years of the company's financials against the standard set by world-class companies in the same market, using industry data drawn from NAICS and RMA sources. This is what keeps the assessment honest. An owner may answer that margins are healthy, but the benchmark shows whether they are healthy against the best operators in the sector.

Two years are used rather than one so the advisor sees direction, not just position. A company can be above the standard and sliding, or below it and climbing, and the trend often matters more than the level.

The financial inputs

The assessment works from the company's financials, gathered at intake. Two documents do the heavy lifting: an income statement and a balance sheet, each covering the last two years plus the current year. Business tax returns are helpful and welcome when available, but they are not required to run the assessment. Together these give the two years of history the benchmark needs, plus the current-year picture.

FINANCIAL DOCUMENT	PERIOD
Income Statement (Profit & Loss)	Last 2 years plus year-to-date; monthly detail preferred
Balance Sheet	Last 2 years plus the most recent month end
Business Tax Returns (Form 1120 or 1065)	Last 2 years; helpful but not required

An important point for a certified advisor to understand: at this stage the assessment uses the financials as the company keeps them. It does not restate the books, and it does not perform add-backs or normalization before benchmarking. Owner-led companies often carry personal expenses, one-time items, and discretionary compensation, and cleaning those up is real and valuable work, but it is downstream work the results may point to, not a step inside the CMG 360 Assessment.

This keeps the assessment fast and low-friction to begin: the owner provides the numbers they already have, and the diagnostic proceeds. Where the financials themselves raise questions, that becomes a finding, and a recommendation may be to tighten the reporting or clean up the statements as a next step.

How answers and benchmark produce a score

A domain score is not the diagnostic answers alone and not the financials alone. It is the two read together. Strong answers backed by strong benchmarked numbers earn a strong score. Confident answers contradicted by weak numbers pull the score down and, just as important, flag a gap between how the owner sees the domain and how it actually performs.

That gap is often the most useful thing the diagnostic surfaces, because it points straight at a blind spot.

Reading the weakest domain

The discipline of COMPASS is to read the weakest domain, not the average. A company does not fail at its average. It fails at its floor. Averaging the seven domains hides the one that is capping the business, which is exactly the domain Random Excellence predicts the owner is least aware of.

The advisor's assessment leads with the floor and asks what it would take to raise it, because raising the floor is usually worth more than extending an already-strong ceiling.

Case studies and common misreads

Common misreads are worth naming. Grading on the ceiling, where a strong domain flatters the whole assessment, is the most frequent. Ignoring the trend, where a benchmark position is noted but its direction is missed, is the next. Taking confident answers at face value without checking them against the numbers is the third.

Each of these produces a comfortable report that misses the point. The certified advisor guards against all three by leading with the floor, reading two years for direction, and letting the benchmark check the narrative.

Review questions

1. Which is one of the seven COMPASS domains?

- **A.** Legal and Compliance
- **B.** Cash & Capital
- **C.** Marketing Spend

   D. Tax Strategy

2. The COMPASS diagnostic instrument has how many questions?
   A. 60
   B. 100
   C. 160
   D. 200
3. Financial benchmarking uses how many years of data, and against what?
   A. One year versus targets
   B. Two years versus NAICS and RMA industry norms
   C. Five years versus competitors
   D. One year versus the prior year
4. A domain score reflects:
   A. Diagnostic answers only
   B. Financials only
   C. The answers and the financial benchmark read together
   D. The owner's self-rating
5. The core discipline of reading COMPASS is to lead with:
   A. The average of the domains
   B. The strongest domain
   C. The weakest domain, the floor
   D. The newest domain
6. On the 0 to 100 scale, a domain scoring 82 falls in which band?
   A. Weak
   B. Caution
   C. Strong
   D. Unscored

Module 6 BEACON™ Market Analysis 8 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

- Administer the BEACON™ questionnaire of about 22 questions and produce the deliverables from it and sourced, bottom-up research
- Read the client's go-to-market, product, pricing, capacity, scale, and geography, and use it to size the opportunity realistically
- Size a market with defensible TAM, SAM, and SOM
- Map the competitive landscape for a middle-market company
- State assumptions and sources so the assessment is auditable

BEACON is more than a market size

It is tempting to think of BEACON as a market-sizing exercise. It is more than that. BEACON begins with the client, not the market. Through a focused questionnaire of about 22 questions, the client provides a substantial amount of information about how they go to market, and BEACON reads it closely: the product and how it is differentiated, the pricing and how it sits against the market, the capacity the company can actually deliver, the scale it operates at, and the geography it can reach.

Where COMPASS runs on its 160-question diagnostic, BEACON runs on this shorter, sharper set of about 22 questions. They are not background details. They are what determine how much of a market a company can realistically serve and win. A company's go-to-market is the lens through which the raw market size becomes a real opportunity, and BEACON reads that lens first.

The questions BEACON asks

The questionnaire is the crux of the assessment, not a preliminary. What BEACON can say about a company's opportunity is only as good as what the company tells it. It comes in two parts. Markets the Company Serves captures the concrete facts of the business, its product, geography, customers, contracts, competitors, and current share. Market Nuances captures the context that data alone cannot show, how pricing really works, what customers actually value, where the market is heading, and what an outsider would get wrong.

Together the two parts run to about 22 questions. A thin or careless answer set produces a thin assessment. A certified advisor treats the questionnaire as a guided conversation, drawing out real numbers and real constraints rather than accepting round, hopeful answers, because everything downstream, the sizing, the competitive assessment, and the recommendations, rests on what these questions capture.

MARKETS THE COMPANY SERVES (12 QUESTIONS)
What is the primary service or product the company provides?
What NAICS code or industry classification best describes the business?
What geographic markets does the company currently serve?
What is the company's primary customer type (end user, distributor, contractor, institution, government)?
Who are your top 5 customers by revenue, and what percentage does each represent?
What is the typical contract or engagement structure (spot, annual, multi-year, project, recurring)?
What is the typical sales cycle from first contact to signed agreement?

MARKETS THE COMPANY SERVES (12 QUESTIONS)
Who are your top 3 direct competitors, and how do you differentiate from each?
Are there markets you have identified for expansion but not yet entered? Why not yet?
What is the approximate total market size for your primary service in your current geography?
What percentage of the market do you believe you currently serve?
Are there adjacent services or markets you have considered but not pursued?
MARKET NUANCES (10 QUESTIONS)
How does pricing actually work in your market (bid, negotiated, rate card, cost-plus)?
What key factors do customers use to select a provider (price, relationship, capability, speed, geography)?
Is your market growing, shrinking, or stable, and what is driving the trend?
Are there regulatory, licensing, or compliance requirements that create barriers or advantage?
What is the role of technology in your market? Is it disrupting the landscape?
Are there seasonal or cyclical patterns in your revenue that matter?
How do labor costs, availability, and turnover affect competition in your market?
What do your best customers value most that your competitors do not provide?
Are there trends in your customer base (consolidation, PE ownership, offshoring) changing the market?
What is the one thing about your market an outsider would most likely get wrong?

How go-to-market shapes the sizing

A market can be enormous and still be mostly out of reach. Capacity caps how much a company can deliver. Geography limits where it can compete. Pricing decides which segments it can win. Scale sets whether it plays against regional or national competitors.

BEACON reads these factors first, then sizes the opportunity against them. This is why its SAM and SOM are grounded rather than aspirational: the serviceable market reflects real capacity and geography, and the obtainable market reflects real pricing and scale. A sizing that ignores go-to-market is a headline number, not a plan.

The BEACON sections and what each delivers

BEACON is delivered as a named set of sections. It profiles the client and its go-to-market, sizes the market at three levels, summarizes the market's shape and direction, states its assumptions and sources, and closes with strategic recommendations and guidance on how to use the assessment.

Each section has a job. Together they answer a single question the inside assessment cannot: how large and how attractive is the opportunity this company is positioned to win?

Market sizing, bottom-up

BEACON sizes a market at three levels. TAM, the total addressable market, is everything the offering could serve in principle. SAM, the serviceable addressable market, is the portion the company could realistically reach given its capacity and geography. SOM, the serviceable obtainable market, is the share the company can actually win given its pricing and scale.

The sizing is built bottom-up from real units, counts, and prices rather than top-down from a headline industry figure, because a bottom-up number can be defended and a top-down number usually cannot.

Competitive landscape

A market size means little without knowing who else is in it. BEACON maps the competitive landscape: who the company competes with, how they are positioned, and where the open ground is.

For a middle-market company this is often less about national giants and more about the handful of regional players who actually contest the same work. The point of the map is to locate the space the company can credibly own, given its go-to-market.

Assumptions, sources, and the no-fabrication standard

BEACON lives or dies on its sourcing. Every number rests on stated assumptions and cited sources, so the assessment is auditable and an owner can see how a figure was reached.

This is a firm standard: BEACON requires sourced, bottom-up research, and a certified advisor never fabricates a market figure or a COMPASS score to fill a gap. A defensible estimate with its assumptions on the table is worth more than a confident number with nothing behind it, and it protects both the client and the CMG brand.

Review questions

1. BEACON is best described as:
   - **A.** A market-sizing exercise only
   - **B.** An outside assessment that reads the client's go-to-market against the market
   - **C.** The inside diagnostic
   - **D.** The financial statement
2. Which of these does BEACON examine as part of go-to-market?
   - **A.** Only the total market size
   - **B.** Product, pricing, capacity, scale, and geography
   - **C.** The owner's tax position
   - **D.** The company's org chart only
3. SAM is narrowed from TAM primarily by:
   - **A.** Pricing and scale
   - **B.** Capacity and geography
   - **C.** The owner's goals
   - **D.** Competitor revenue
4. BEACON sizes markets:
   - **A.** Top-down from an industry headline
   - **B.** Bottom-up from units, counts, and prices
   - **C.** By competitor revenue only
   - **D.** By the owner's estimate
5. The no-fabrication standard requires that:
   - **A.** Estimates are avoided entirely
   - **B.** Every figure rests on stated assumptions and cited sources
   - **C.** Only round numbers are used

D. Sources are optional

6. The BEACON questionnaire consists of about how many questions?
   A. 160
   B. 100
   C. 22
   D. 7
7. The BEACON questionnaire is crucial because:
   A. It is graded like the exam
   B. What BEACON can say about the opportunity depends on what the company tells it
   C. It replaces the market research
   D. It is optional

Module 7 CMG 360 Assessment™ and the Bridge 8 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

- Connect the internal COMPASS™ assessment to the external BEACON™ assessment
- Build the Bridge that ties gaps to what they unlock in the market
- Assemble the standard CMG 360 Assessment™ document to the brand standard
- Produce a clean deliverable ready for review

Inside meets outside

The CMG 360 Assessment is where the inside and outside assessments meet. COMPASS says how the company is running. BEACON says what surrounds it. On their own each is half a picture.

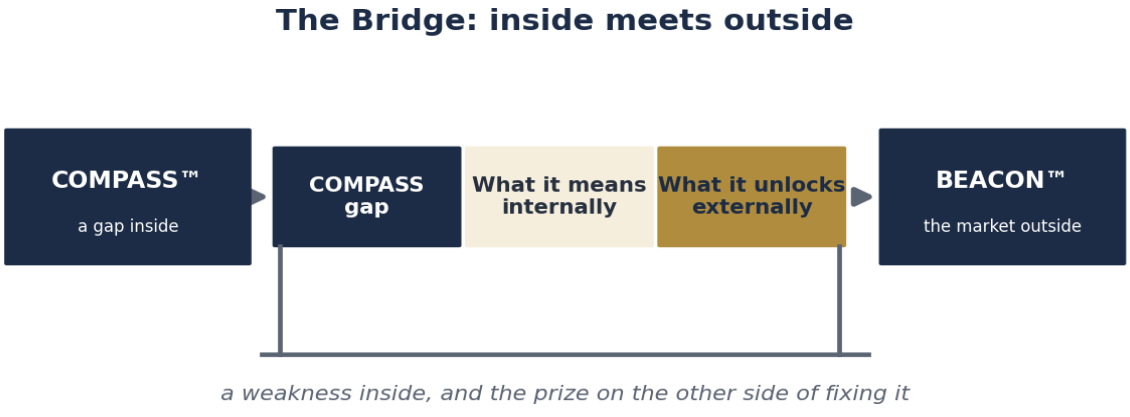
A well-run company aimed at a shrinking market and a rough company sitting in front of a large one need very different advice, and only the combined assessment reveals which one you are looking at.

The Bridge

The Bridge is the device that joins them. It is built in three columns. The first names a COMPASS gap. The second says what that gap means internally, in the day-to-day of the business. The third says what closing it would unlock externally, in the market that BEACON mapped.

The Bridge is what turns a diagnosis into a case for action. It takes an internal weakness and shows the owner the external prize on the other side of fixing it, which is the argument that actually moves owners. A few worked examples:

COMPASS GAP	WHAT IT MEANS INTERNALLY	WHAT IT UNLOCKS EXTERNALLY
Weak Accounting	Decisions are made on late, uncertain numbers	Lender and buyer confidence, better financing terms, a higher multiple
Thin Sales	Revenue depends on a few relationships	A repeatable funnel that captures more of the market BEACON™ sized
Key-person risk in Operations & HR	The business cannot run without the owner	A transferable business a buyer will pay for, and room for the owner to step back



The Bridge carries a gap from the inside read to the prize it unlocks on the outside.

Document production and the standard format

The CMG 360 Assessment follows a standard format so every deliverable is recognizable and complete: a cover, an executive summary, a company profile, financial highlights, the COMPASS table, the BEACON summary, the Bridge table, strategic recommendations, and appendices.

Producing it well is a discipline of assembly. The advisor's judgment goes into the executive summary and the recommendations; the rest is a consistent frame that lets the reader find what they expect where they expect it.

Brand standards

The deliverable carries the CMG brand, and the brand has standards. Navy and gold. Trademarks on the marks, including COMPASS, BEACON, and CMG 360 Assessment, on first prominent use. No em dashes. Never a bare 360; it is always CMG 360 or CMG 360 Assessment.

These are not fussy preferences. A certified advisor produces co-branded work, and consistency is what makes that work look like it came from one firm with one standard.

The full deliverable, end to end

A complete CMG 360 Assessment is more than the headline sections. The cover, executive summary, company profile, financial highlights, COMPASS table, BEACON summary, Bridge table, and strategic recommendations carry the story. Behind them, the appendices carry the evidence: the detailed COMPASS domain results, the financials and the benchmark comparisons behind the highlights, and the BEACON assumptions and sources that stand behind every market figure.

The appendices matter because they are what make the assessment auditable. An owner, a lender, or a buyer can trace any score or figure back to the data and assumptions that produced it. A certified advisor should be able to point to where each claim in the front of the report is supported in the back, which is what separates a credible assessment from a slide deck.

Review questions

1. The CMG 360 Assessment combines:
    - **A.** Two years of financials
    - **B.** COMPASS (inside) and BEACON (outside)
    - **C.** Two separate diagnostics
    - **D.** The owner's and advisor's views
2. The Bridge is built in three columns: a COMPASS gap, what it means internally, and:
    - **A.** Who owns the fix
    - **B.** What closing it unlocks externally
    - **C.** The cost to fix
    - **D.** The deadline
3. The Bridge turns a diagnosis into:
    - **A.** A score
    - **B.** A case for action tied to a market prize
    - **C.** A financial model
    - **D.** A quiz
4. Which is part of the standard CMG 360 Assessment format?
    - **A.** A press release
    - **B.** The COMPASS table and BEACON summary

C. A tax return
D. An org chart only

5. Which is a CMG brand standard?
A. Em dashes are encouraged
B. Bare “360” is preferred
C. Navy and gold, trademarks on marks, no em dashes, never bare 360
D. Any color scheme is fine

Module 8 Understanding the Output 10 hours

LEARNING OBJECTIVES

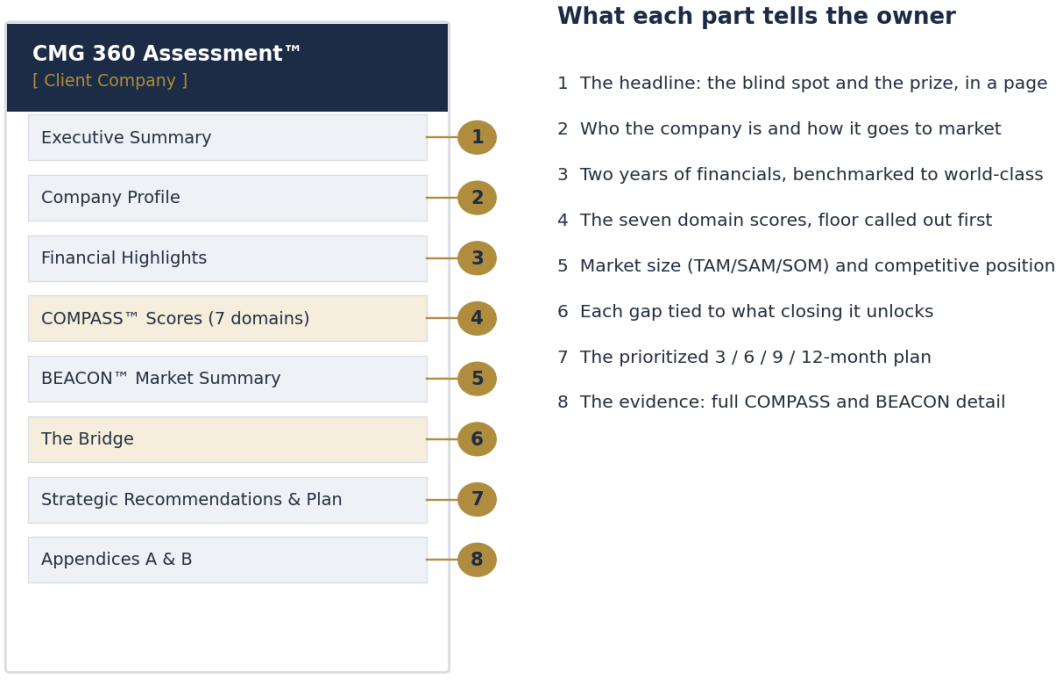
By the end of this module, the certified advisor can:

- Read a completed CMG 360 Assessment™ end to end and understand what it is telling you
- Locate where the financial benchmarking appears in the output and how it feeds the COMPASS™ table
- Interpret the combined COMPASS™ and BEACON™ picture, not just the individual scores
- Show how the same results serve different owners, and how the results connect to value
- Translate the output into clear recommendations and the prioritized 3/6/9/12-month plan
- Explain the results to an owner in terms they will act on

Reading the finished assessment as a whole

A finished CMG 360 Assessment is meant to be read as a whole, not as a stack of parts. The executive summary states the headline. The COMPASS table shows the inside assessment. The financial highlights show the benchmarked numbers. The BEACON summary shows the outside assessment. The Bridge ties them together, and the recommendations and plan say what to do.

Understanding the output means holding all of these at once and seeing the single story they tell, rather than reciting each section in turn. The annotated view below shows the structure of a delivered assessment and what each part is telling the owner.



Illustrative structure of a delivered assessment; the callouts are the explanations

The structure of a delivered CMG 360 Assessment, with a note on what each part tells the owner.

Where benchmarking lands

Benchmarking appears in two places in the output, and the advisor should be able to point to both. It shows up in the financial highlights, where the company's two years of numbers sit against the

NAICS and RMA norms, and it feeds the COMPASS table, where the benchmarked financials combine with the diagnostic answers to set the domain scores.

When an owner asks how a domain earned its score, the answer usually runs back through the benchmark. Knowing where it lands lets the advisor explain the report with confidence.

What COMPASS, BEACON, and the Bridge say together

The combined assessment is the point. COMPASS names the internal gaps. BEACON sizes the external opportunity. The Bridge connects a specific gap to a specific prize. Read together they answer the owner's real question, which is not how am I doing but where should I put my attention to be worth more.

The advisor's job in this module is to synthesize, to say in a sentence or two what the whole assessment is telling this owner, in this market, given what they want.

From findings to recommendations

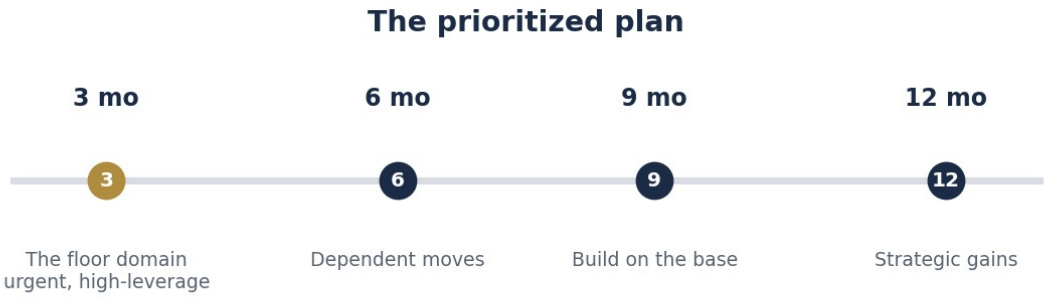
Findings are not recommendations. A finding says what is; a recommendation says what to do about it. The move from one to the other is where the advisor earns the engagement.

A good recommendation is specific, tied to a named gap, and framed in terms of the market prize the Bridge identified. It tells the owner not just to fix the weak domain but why the fix is worth more than the effort, in language drawn from the outside assessment.

The prioritized 3/6/9/12-month plan

The recommendations resolve into a plan across four horizons: 3, 6, 9, and 12 months. The horizons force sequence. Not everything can be first, and the plan's value is in deciding what comes first and what waits.

The near horizons carry the urgent, high-leverage moves, usually aimed at the floor domain. The later horizons carry the work that depends on those first moves landing. A plan that spreads everything evenly has not made the hard choice the owner needs made for them.



The near horizons carry the urgent, high-leverage moves; the later ones build on them.

What to do with the results: the owner conversation

The output is only as good as the conversation it enables. The certified advisor walks the owner through the assessment in their own terms, leads with the blind spot and the prize, and lands on the first three months.

The goal of the conversation is not to impress the owner with the analysis but to leave them with clarity on what to do next and the will to do it. Everything in the report is in service of that conversation.

How different owners use the results

The same assessment serves different owners differently, because each reads it through what they are trying to do. The table below shows how the results shape the decision for six common situations, and, just as important, where the assessment often surprises the owner by pointing somewhere they were not looking.

THE OWNER	HOW THE RESULTS SHAPE THE DECISION	WHERE THEY MAY BE SURPRISED
Wants to sell in a few years	Shows which gaps depress the multiple and what closing each is worth; the 3/6/9/12 plan becomes a value-building runway before going to market	Strong revenue does not guarantee a strong multiple. A buyer discounts the floor, key-person risk, thin reporting, customer concentration, and the value gap is often larger and more fixable than assumed
Wants to acquire other companies	Tests whether the company's own systems, capital, and organization can absorb a deal, and gives a template to run on targets to expose their floor and integration risk	The constraint is usually internal readiness, not the pipeline. A weak Planning, Accounting, or Systems floor would break under a bolt-on
Wants bank financing	Surfaces the metrics a lender underwrites and where the company trails the standard, so the owner shores them up and walks in with a benchmarked story	The problem is often reporting credibility, or a covenant closer to breach than realized, rather than the headline number or the collateral
Wants to expand geographically and invest	BEACON™ sizes the serviceable and obtainable market in the new area and tests go-to-market fit; COMPASS™ shows whether capacity and capital support the move, so the investment is timed and scoped	The home-market floor follows and amplifies in the new market, or the new geography is smaller or more contested than assumed. Fixing the base first is often the better move
Concerned about margins	Decomposes where margin trails world-class and separates a pricing problem from a cost problem from a revenue-quality problem, so the owner targets the real driver	The assumed cost problem is often a pricing or mix problem, or margin is fine and the real gap is cash conversion
Concerned about future revenue	BEACON™ shows where the market is heading and whether the company is positioned; the Sales read shows whether the funnel can produce future revenue	The market is often fine and the constraint is the company's own go-to-market, or the company is strong but the market is contracting and diversification is the real need

In every one of these, the surprise is often the point. The owner arrives with a theory about their business and leaves with a benchmarked, prioritized picture that frequently points somewhere they were not looking. That is Random Excellence™ in practice: the gap that matters most is usually the one the owner could not see, and naming it is what changes the decision.

The multiple: connecting the results to value

For an owner thinking about value, the assessment draws a line the owner rarely sees on their own. The multiple a company earns is not luck; it is a score, and it tracks the same domains COMPASS measures. Weak Cash & Capital, thin Accounting, heavy key-person risk, and customer concentration are exactly what a buyer discounts.

The assessment names those gaps, sizes them against world-class companies, and, through the Bridge, shows what closing each one is worth in the market. That turns improve the business into here is the specific work that raises the multiple, in priority order. A certified advisor can walk an owner from a domain score to enterprise value without ever issuing a formal valuation.

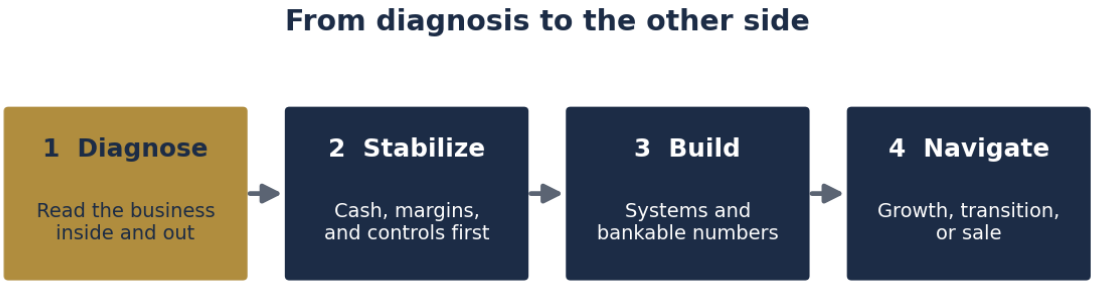
What happens next: re-assessment and ongoing advisory

An assessment is a starting point, not an endpoint. Once the owner acts on the plan, the value of the platform is that the work can be measured. Re-running the assessment at intervals shows whether the gaps are closing, and because the instrument does not drift, the comparison is real progress rather than a change in method.

This is also where a diagnostic becomes an ongoing advisory relationship. The CMG 360 Assessment identifies the work, the following months execute it, and the re-assessment proves it. A certified advisor frames the first assessment as the opening of that cycle, not a one-time report.

From diagnosis to the other side

The plan is not a flat list; it follows an arc the owner can recognize. First Diagnose, reading the business inside and out. Then Stabilize, putting cash, margins, and controls right before anything else. Then Build, the systems and bankable numbers that let the company scale. Then Navigate, the growth, transition, or sale the owner is actually working toward. The sequence is deliberate: worst-first and opportunity-first, so the fragile things are fixed before the ambitious ones are attempted.



The plan carries a company from diagnosis through to the other side, sequenced worst-first.

Review questions

1. A finished CMG 360 Assessment should be read:

- **A.** Section by section in isolation
- **B.** As a whole telling one story
- **C.** Backwards from the appendix
- **D.** Summary only

2. Benchmarking appears in the output in the financial highlights and:

A. The cover
B. The COMPASS table, feeding the domain scores
C. The appendix only
D. Nowhere else

3. The difference between a finding and a recommendation is:

A. Length
B. A finding says what is; a recommendation says what to do
C. Who writes it
D. There is none

4. The prioritized plan spans:

A. 1, 2, and 3 months
B. 3, 6, 9, and 12 months
C. 12 and 24 months
D. Weekly increments

5. An owner certain their revenue problem is the market runs the assessment and learns their own funnel is the constraint. This is an example of:

A. A scoring error
B. The assessment surfacing a blind spot the owner could not see
C. An irrelevant finding
D. A market problem

6. The assessment connects to a company's valuation by:

A. Issuing a formal appraisal
B. Showing that the multiple tracks the same domains COMPASS measures, and what closing each gap is worth
C. Guaranteeing a sale price
D. Ignoring value entirely

Module 9 Industry Application: Index of Examples 6 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

- Show how the platform adapts to any industry through Context-Aware Diagnostics™, not through a separate method
- Work through an index of examples across the core CMG industries
- Apply the right benchmarks and context cues to each sector
- Recognize how the same COMPASS™ domain reads differently from one industry to the next

Adaptation by context, not by rebuilding the method

The method does not change from industry to industry. What changes is the context, and Context-Aware Diagnostics is what carries the adaptation. The seven domains, the benchmarking, and the Bridge are the same for a landscape company and a forge.

What differs is the industry norms the benchmark uses and the context cues that shape interpretation. This module is not a set of new methods. It is a library of examples showing the one method applied across sectors.

The index of examples

The core CMG industries anchor the index: construction, manufacturing, distribution, trades, and landscape. Each entry shows the method at work in that sector: what the benchmark comparison draws on, which domains most often surface as the floor, and how the owner's typical concerns in that sector shape the assessment.

A construction contractor's Cash & Capital reads against the sector's heavy working-capital swings; a landscape company's Sales reads against seasonality; a manufacturer's Margins reads against input costs and utilization. The table below is a starting index.

SECTOR	WHERE THE FLOOR OFTEN SHOWS	CONTEXT CUES AND BENCHMARKS
Construction	Cash & Capital	Retainage, progress billing, and working-capital swings; RMA contractor norms
Manufacturing	Margins	Input costs, utilization, and inventory; RMA manufacturing norms
Distribution	Systems and Technology	Warehouse and inventory systems and turns; RMA wholesale norms
Trades	Planning	Scheduling, dispatch, and job costing; RMA trade-contractor norms
Landscape	Sales	Seasonality and recurring-revenue mix; RMA landscape norms

Benchmarks and context cues by sector

Each sector brings its own benchmarks and its own cues. RMA and industry data supply the financial norms, and those norms differ sharply by sector, so the same margin is strong in one and weak in another.

The context cues differ too: the questions that matter most, the risks that recur, and the shape of a typical owner's concerns. The advisor learns to reach for the right benchmark set and the right cues rather than applying one industry's expectations to another.

How a domain shifts by industry

The same domain can read very differently across sectors. Systems in a distribution business is often about warehouse and inventory systems and is frequently the floor; in a trades business it may be about scheduling and dispatch. Cash & Capital in construction is dominated by retainage and progress billing; in manufacturing by inventory and equipment.

Knowing how a domain expresses itself in a given industry is what keeps the advisor from misreading a normal sector trait as a problem, or missing a sector-specific problem entirely.

Using the index as a reference library

The index is meant to be used, not memorized. When a certified advisor takes on an engagement in a familiar sector, the entry is a fast refresher on the benchmarks and cues that matter. When the sector is new, the entry is the starting point, and the advisor extends it with sourced research in the same way BEACON is built.

Over time, an advisor's own engagements enrich their working version of the index.

Review questions

1. Across industries, what changes in the method?

- **A.** The seven domains
- **B.** The context: benchmarks and interpretation cues, carried by Context-Aware Diagnostics
- **C.** The Bridge
- **D.** Everything

2. The core CMG industries in the index include:

- **A.** Retail and hospitality
- **B.** Construction, manufacturing, distribution, trades, and landscape
- **C.** Technology and finance
- **D.** Healthcare only

3. Financial norms by sector come from:

- **A.** The owner's estimate
- **B.** RMA and industry data
- **C.** A single national average
- **D.** Competitor guesses

4. In construction, Cash & Capital is dominated by:

- **A.** Inventory turns
- **B.** Retainage and progress billing
- **C.** Seasonality
- **D.** Utilization

5. The index is best used as:

- **A.** A script to memorize
- **B.** A reference library extended with sourced research
- **C.** A replacement for BEACON
- **D.** A scoring shortcut

Module 10 Limitations, Responsible Use, and Professional Conduct

6 hours

LEARNING OBJECTIVES

By the end of this module, the certified advisor can:

- Explain clearly what the CMG 360 Assessment™ does and does not do
- Recognize the boundary between platform output and advisor judgment
- Apply the data-integrity standards: real diagnostic scores, sourced BEACON™, and no fabrication
- Uphold the professional conduct the credential requires

What the assessment does not do

The assessment is a powerful diagnostic, but it is not everything, and a certified advisor is precise about its limits. It is not an audit; it works from the information the client provides and does not verify their books. It is not a formal valuation; it explains what drives the multiple but does not issue an appraisal. It is not a guarantee; it sizes gaps and opportunities, but the results depend on execution.

And it is not a substitute for the advisor. The platform produces a consistent read, but judgment, context, and the owner conversation are the advisor's to bring. Naming these limits plainly protects both the client and the credential, and an advisor who oversells the assessment does more harm than one who states its boundaries.

Platform output versus advisor judgment

The platform and the advisor have different jobs. The platform administers the diagnostic, benchmarks the financials, sizes the market, and produces a consistent, repeatable read. The advisor brings the context, interprets that read against the owner's goals and concerns, decides what leads, and turns findings into recommendations the owner will act on.

A certified advisor never presents platform output as if it were their own analysis, and never overrides a score with an opinion. They interpret the score; they do not rewrite it. When the score and the advisor's instinct disagree, that tension is a finding to explore with the owner, not a number to quietly change.

THE PLATFORM'S JOB	THE ADVISOR'S JOB
Administer the diagnostic and score the seven domains	Interpret the scores against the owner's goals and concerns
Benchmark the financials against world-class companies	Explain what the gaps mean and what closing them is worth
Size and map the market from sourced research	Decide what leads and turn findings into recommendations
Produce a consistent, repeatable read	Bring context, judgment, and the owner conversation

The data-integrity standards

Three standards are absolute. COMPASS scores come from the actual diagnostic, never estimated. BEACON figures rest on sourced, bottom-up research, never invented. And the assessment never fabricates output to fill a gap; where data is missing, it says so.

A certified advisor who bends any of these is no longer producing a CMG 360 Assessment, whatever the document is labeled. The standards are what give the brand its meaning, and protecting them is part of what the credential certifies.

Professional conduct

The credential carries obligations. Client information is confidential and used only to produce that client's assessment. The CMG brand standards are followed on every deliverable. Conflicts of interest are disclosed. And the advisor represents the assessment honestly, its strengths, its limits, and its security, without overstating any of them.

These commitments are what the brand-and-data-integrity agreement formalizes, and they are as much a part of certification as the method itself. The credential says not only that an advisor can run the assessment, but that they can be trusted with what it touches.

Review questions

1. The CMG 360 Assessment is:
   - **A.** An audit of the client's books
   - **B.** A diagnostic that works from client-provided information and does not verify the books
   - **C.** A guarantee of results
   - **D.** A formal valuation
2. When platform output and the advisor's opinion differ, the advisor should:
   - **A.** Rewrite the score to match their view
   - **B.** Interpret the score in context rather than override it
   - **C.** Delete the score
   - **D.** Ignore the platform
3. Which is an absolute data-integrity standard?
   - **A.** Estimate COMPASS scores when data is thin
   - **B.** Never fabricate output; if data is missing, say so
   - **C.** Use top-down market figures
   - **D.** Skip sourcing when time is short
4. Client information may be used:
   - **A.** For CMG marketing
   - **B.** Only to produce that client's assessment
   - **C.** Shared with other clients
   - **D.** Sold to partners
5. The brand-and-data-integrity agreement formalizes:
   - **A.** Pricing and fees
   - **B.** Confidentiality, brand standards, honest representation, and the integrity standards
   - **C.** The exam format
   - **D.** The company org chart

Frequently Asked Questions

The questions a certified advisor hears most often from owners. Being able to answer these plainly and accurately is part of what the credential certifies.

1. What exactly is the CMG 360 Assessment?

A structured assessment of a privately held company from two directions at once. COMPASS reads the inside across seven domains, BEACON reads the outside market, the Bridge ties each gap to what closing it unlocks, and the whole thing resolves into a prioritized 3, 6, 9, and 12-month plan.

2. What do I get at the end?

A single report: an executive summary, company profile, financial highlights, the COMPASS scores, the BEACON market assessment, the Bridge, strategic recommendations, and a prioritized plan, with appendices holding the detail behind every figure.

3. What do I have to provide?

A short intake: the company profile, the five owner questions and a curiosity set, three financial documents, the market questionnaire, and the 160-question diagnostic. Fewer than 250 inputs in all.

4. Which financial documents do you need?

An income statement and a balance sheet for the last two years plus the current year to date. Business tax returns are helpful but not required.

5. Is this an audit?

No. It works from the information you provide and does not verify your books. It is a diagnostic, not an audit or an attestation.

6. Is this a business valuation?

No. It explains what drives your multiple and what closing gaps is worth, but it does not issue a formal appraisal.

7. How are the scores calculated?

Each of the seven domains scores on a 0 to 100 scale, based on how many of its questions, each one a practice world-class companies have in place, you answer yes to. 70 and above is strong, 50 to 69 is caution, and below 50 is weak.

8. Who am I being compared to?

World-class companies in your own market, not an average. Your financials are benchmarked against industry data, and your operating practices against what top performers in your field actually do.

9. What if my numbers are not clean?

That is fine. The assessment works from the financials as you provide them; it does not require you to restate or adjust them first. Cleaning up the books, add-backs and normalization, is later work the results may point to, not a prerequisite.

10. It uses AI. Is it reliable?

The scores and benchmarks are computed by rule, not by AI, so they do not vary. The AI works only from your structured data, under strict guardrails, and never fabricates a number or a source.

11. Will I get a different answer if I run it again?

No. The same inputs produce the same scores, benchmarks, and conclusions. That is exactly what lets you track progress over time.

12. If the input is so compact, how is the analysis deep?

The platform breaks each assessment into thousands of small, focused steps, weighing every answer and financial scenario in the context of all the others. A short questionnaire is analyzed far more thoroughly than its length suggests.

13. How is this different from hiring a consultant?

A consultant gives you one person's opinion. The CMG 360 Assessment is a repeatable measurement against a world-class standard, the same for any certified advisor who runs it.

14. Is my information secure?

Yes. Data is encrypted in transit and at rest, access is limited to your own advisor, tenant isolation keeps your data separate at the database level, and everything is hosted in the United States. The intake opens with a confidentiality acknowledgment.

15. Who can see my data?

Only the certified advisor who owns your engagement. The platform enforces that at the database level.

16. Does this work for my industry?

Yes. The method is the same across industries; what changes is the benchmark and the context. It is applied across construction, manufacturing, distribution, trades, landscape, and more.

17. What is the COMPASS score really telling me?

Where you stand against world-class practice in each of seven domains, and, most importantly, which domain is your floor, the one most likely capping the business.

18. Why does my weakest domain matter more than my strengths?

A company fails at its floor, not its average. The domain you are weakest in, often the one you watch least, is usually what limits the whole business.

19. What is BEACON telling me?

How large and attractive your market is, and how well positioned you are to win a share of it, given your product, pricing, capacity, scale, and geography.

20. What do I do with the results, and what happens next?

Work the prioritized plan, starting with the first three months and the floor domain. The assessment is the start of a cycle, not a one-time report: as you act, re-running it measures real progress and becomes the basis for ongoing advisory.

Answer Key

Answers to the review questions in each module. Use these to check your understanding, not to shortcut it. The certification exam rewards the same applied reasoning these questions are built on.

Module 1. **Introduction to the CMG 360 Assessment™** 1B 2B 3B 4C 5B

Module 2. **How the CMG 360 Assessment™ Works** 1B 2B 3B 4B 5B 6B 7B

Module 3. **Random Excellence™** 1B 2B 3B 4B 5C

Module 4. **Context-Aware Diagnostics™** 1B 2B 3A 4C 5B

Module 5. **COMPASS™ Diagnostic** 1B 2C 3B 4C 5C 6C

Module 6. **BEACON™ Market Analysis** 1B 2B 3B 4B 5B 6C 7B

Module 7. **CMG 360 Assessment™ and the Bridge** 1B 2B 3B 4B 5C

Module 8. **Understanding the Output** 1B 2B 3B 4B 5B 6B

Module 9. **Industry Application: Index of Examples** 1B 2B 3B 4B 5B

Module 10. **Limitations, Responsible Use, and Professional Conduct** 1B 2B 3B 4B 5B

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The 160-question instrument ..... Modules 2, 5
The BEACON™ questionnaire (about 22 questions) ..... Modules 1, 6
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