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Financial Fluency Self-Assessment for Strategic Growth

Use this self-assessment to rate your confidence and fluency in key areas that reflect strategic thinking and financial leadership. Rate yourself on a scale from 1 (Not Yet Confident) to 5 (Highly Confident). Revisit monthly to track your growth.

1. Revenue Levers

I can identify how a project or program impacts specific revenue levers (deal size, velocity, retention, etc.). (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

I can clearly explain how enablement activities influence top-line revenue growth. (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

2. P&L Thinking

I consider how my work contributes to both revenue and cost-efficiency. (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

I can speak to how a project affects company profitability or margin. (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

3. CAC vs. CLV Thinking

I understand how enablement can reduce Customer Acquisition Cost (CAC). (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

I can connect my work to increasing Customer Lifetime Value (CLV). (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

4. Executive Dashboard Thinking

I track and present both leading and lagging indicators of success. (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

[] I can confidently create or speak to an enablement dashboard with executive-relevant KPIs. (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

5. Strategic Questioning & Decision-Making

[] I ask proactive, strategic questions that challenge assumptions or drive clarity. (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

[] I am confident participating in or influencing financial and business-level decisions. (Rate: 1 - Not Yet Confident → 5 - Highly Confident)

Reflection & Next Steps

What areas do I feel strongest in?

Where do I want to focus in the next 30 days?

What support, resources, or coaching will help me grow further?