



ZIGLAR BUSINESS OWNER
BOOT CAMP



PERSONAL WHEEL: ASSESSMENT SHEET

Directions: On the following pages rate yourself from 1-10 in each category. Divide your total by 10 to reach your final number in each category. Using spokes of the wheel image below, plot your number in each category and connect the dots to see how smooth your ride is.

Physical

- appearance
- regular checkup
- energy level
- muscles toned
- regular fitness program
- weight control
- diet & nutrition
- stress control
- endurance & strength
- enough sleep
- TOTAL ÷ 10 = _____

Spiritual

- believe in God
- inner peace
- influence on others
- spouse relationship
- church involvement
- sense of purpose
- attitude for giving donations
- prayer
- Bible study
- abundant gratitude
- TOTAL ÷ 10 = _____

Mental

- attitude
- intelligence
- formal education
- continuing education & training
- creative imagination
- inspirational reading
- inquisitive mind
- self-image
- enthusiasm
- Automobile University
- TOTAL ÷ 10 = _____

Family

- listening
- good role model
- principled but flexible
- forgiving attitude
- build self-esteem of others
- express love and respect
- meals together
- family relationships
- dealing with disagreements
- time together
- TOTAL ÷ 10 = _____

Financial

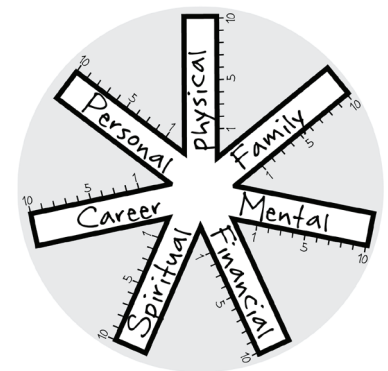
- proper priority
- personal budget
- impulse purchases
- earnings
- living within income
- money in savings
- adequate insurance
- investments
- financial statement
- debt free
- TOTAL ÷ 10 = _____

Personal

- recreation
- exercise
- friendships
- community activities
- service clubs
- quiet time
- growth time
- consistent life
- appropriate social media
- time management
- TOTAL ÷ 10 = _____

Career

- love what I do
- understand my job
- co-worker relationships
- productivity
- understand company goals
- understand my activity in relationship to my goals
- appreciate company benefits
- opportunity for advancement
- well-trained for my job
- own my business/have career path
- TOTAL ÷ 10 = _____



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MARKETING ASSESSMENT

Marketing

_____ Meeting or exceeding my sales goals through effective lead generation and promotions

_____ We have a clear position in the marketplace

_____ We have clearly defined our prime target market

_____ We have clear definitions of our product and/or services

_____ We have a pricing strategy that is profitable

_____ We are consistently marketing to our house list (client base)

_____ We have an effective referral relationship program

_____ We have an effective referral/affiliate reward system

_____ We have a written, posted marketing calendar

_____ We have an effective Internet marketing system that includes websites(s) that clearly communicate what we do; we utilize SEO; we are consistently capturing e-mail addresses and using them to communicate to our e-mail audience; and we have a strong presence on social media

_____ TOTAL ÷ 10= _____



SALES ASSESSMENT

Sales

_____ We answer the telephone live

_____ We have effective telephone answering/transferring systems

_____ We have an effective sales script that appeals to our target market and closes the maximum number of inquiries

_____ We have an effective system for responding to Internet leads

_____ We have an effective sales process for each of our profit centers

_____ We have an effective up-sell and down-sell process

_____ We have effective processes and scripts for overcoming objections

_____ We have an effective process for identifying ongoing and changing customer needs

_____ We have clearly defined account management policies and procedures

_____ We have effective customer management software in place

_____ TOTAL ÷ 10= _____



OPERATIONS ASSESSMENT

Operations

_____ We have developed our unique service experience

_____ We have clearcut service systems in place that are exceeding our client expectations

_____ We respond immediately to client concerns

_____ We have clearcut return/refund policies

_____ We get customer feedback on a regular basis to ensure we are exceeding expectations

_____ We have regular production meetings to ensure on-time delivery

_____ We have a key customer appreciation process

_____ We have effective project management processes in place

_____ We have inventory management and office supplies/equipment processes in place

_____ We have the latest, most effective equipment to deliver our unique service experience

_____ TOTAL ÷ 10= _____



ADMINISTRATION ASSESSMENT

Administration

- _____ We track and report sales by profit center weekly, monthly and annually
- _____ We track and report total sales daily
- _____ We track and report sales by referral/affiliate/ad source weekly
- _____ We track and report sales closings daily (# of calls vs. # of sales)
- _____ We track and report number of returns or re-services as they occur
- _____ We track and report our profit and loss weekly
- _____ We track and report our balance sheet monthly
- _____ We have a cash flow management process in place that includes systems for Accounts Payables and Accounts Receivables
- _____ We plan our taxes annually before year end
- _____ We review our legal and insurance exposure annually (or as often as required)
- _____ TOTAL ÷ 10= _____



LEADERSHIP ASSESSMENT

Leadership

- _____ We have a one-sentence mission statement that everyone understands and follows

- _____ We have effective management systems in place that include recruiting, hiring, orientation, training, coaching, employee reviews and termination processes, and have ensured they are legal

- _____ We have an up-to-date employee handbook

- _____ We have a written business plan that includes our vision, goals, a marketing plan, sales plan, operating plan, and administration plan that is reviewed and updated quarterly

- _____ We have a written and posted organizational chart

- _____ We have regular team meetings

- _____ We have written position descriptions for every position

- _____ We have a training system in place for every position

- _____ We have policies and procedures for all areas of our business

- _____ We have an effective compensation plan in place that includes attractive pay and benefits that create high employee morale and retention

- _____ TOTAL ÷ 10= _____



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