



# 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= \_\_\_\_\_



ZIGLAR BUSINESS OWNER  
**BOOT CAMP**

