

Business Wheel: Assessment Sheet

Marketing

- Meeting or exceeding my sales goals through effective lead generation and promotion strategies
- We have a clear position in the marketplace
- We have clearly defined our prime target market
- We have clear definitions of our products 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 web-sites that clearly communicate what we do, and utilize SEO, and 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

- We answer the telephone live
- We have an effective telephone answering/transferring system
- 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

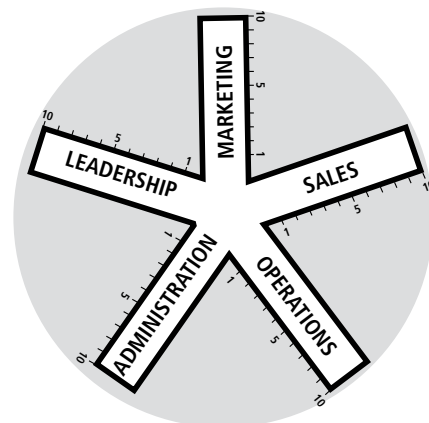
- We have developed our unique service experience
- We have clear-cut service systems in place that are exceeding our client expectations
- We respond immediately to client concerns
- We have clear-cut return policies
- We get customer feedback on a regular basis to ensure we are exceeding expectations
- 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

- We track and report total sales daily
- We track and report sales by profit center weekly, monthly and annually
- 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 often 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
- We plan our taxes annually before year end
- We review our legal and insurance exposure annually (or as often as required)
- TOTAL ÷ 10 = _____

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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