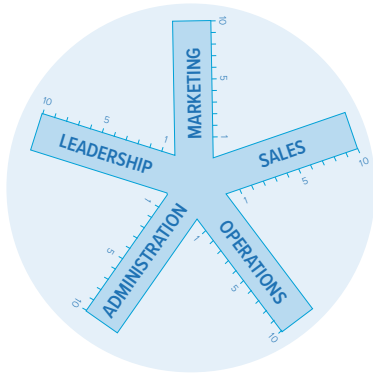


# BUSINESS WHEEL ASSESSMENT SHEET



## 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.

**Important: Please SAVE file before closing to retain notes.**

## 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, 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 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

- We have developed our unique service experience
- We have clear/cut service systems in place that are exceeding our client's expectations
- We respond immediately to client concerns
- We have clear cut 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

- 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

- We have a compelling vision statement that everyone understands and follows
- We have effective management systems in place that includes 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 performance results description 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= \_\_\_\_\_