

BUSINESS ASSESSMENT TIMEC

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

 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 um 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=



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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/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-



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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
Payablo	We have a cash flow management process in place that includes systems for Accounts es 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=



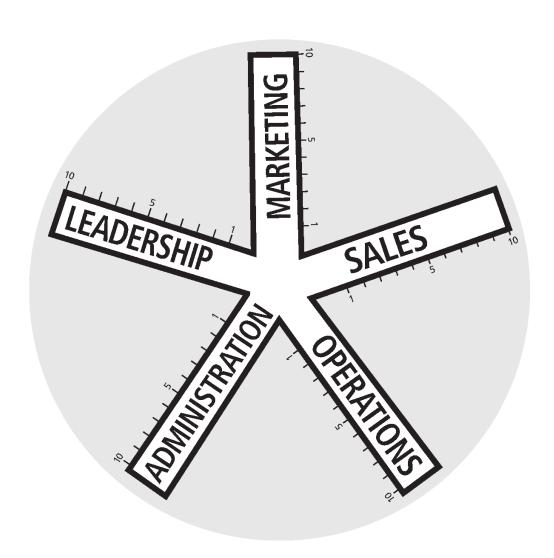
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Leadership

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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