



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 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/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 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=** _____

