

BUSINESS EFFECTIVENESS EVALUATION

(Value \$297.00)

Name: _____

Title: _____ Telephone _____

Email: _____ Company: _____

Number of Employees (current) _____ (prior year) _____

The following questionnaire has been designed to help you rate your business in various key areas. Read each statement and rate where your business stands today by filling in your level of agreement with the statement from 1 to 10 in the scoring column.

MARKETING	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
We have at least 10 marketing strategies active at all times	1		10
Our marketing message addresses our target market and their interests DIRECTLY.	1		10
Our marketing message is consistent across all mediums that we use.	1		10
All of our marketing tells the prospect exactly what to do next in making contact with us.	1		10
We track all leads, and know exactly what marketing medium brought the prospect into contact with us.	1		10
Our marketing message is dramatically different from our competitors'.	1		10
We are constantly looking for new ways to provide additional products and services to our target market.	1		10
We maintain a current database of current and potential customers.	1		10
We use strategies such as guarantees and testimonials to enhance our marketing message in all communications.	1		10
We communicate with past customers on a regular basis to ensure that they come back again and again.	1		10

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SALES	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
We use scripts in all of our initial contacts with potential customers (Phone/Face-to-Face/Walk-in/Internet, etc.)	1		10
We measure all of the variables of our sales process, including such things as average number of appointments before the sale, the conversion rate (prospect to client), sales cycle, etc.	1		10
We have a proven, defined, and written sales system.	1		10
We provide our sales team with effective tools to help them to convert prospects more effectively (demonstrations, samples, etc.)	1		10
Our sales staff has regular, formal training on both product knowledge and sales skills.	1		10
We use the most current technology to track the sales team's activity, such as appointments, prospect lists, etc.	1		10
We motivate our sales team effectively using time-tested motivational techniques.	1		10
We follow up with prospects who didn't buy from us to find out why.	1		10
We have regular sales meetings.	1		10
Our sales team has a terrific relationship with all of the other departments.	1		10
CUSTOMER SERVICE	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
The outside appearance of the business is current, orderly, and professional - including the buildings, lots, and signage.	1		10
The inside of the business is professional, neat, clean and comforting to the customer.	1		10
Our employees are well-dressed, groomed properly, and maintain a neat, consistent appearance.	1		10

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CUSTOMER SERVICE Cont'd	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
We consistently deliver on time, and in an instance where we are not on time, we notify the customer immediately.	1		10
We consistently "under-promise and over-deliver."	1		10
We quickly resolve customer dissatisfaction to the satisfaction of the customer.	1		10
We do the "little things" to make our customer's experience unique, and are always looking for new ways to enhance their experience with us.	1		10
We survey customers regularly to see how we are performing.	1		10
Our customer service is always consistent.	1		10
We constantly follow-up on customer dissatisfaction issues to ensure better products and services In the future.	1		10
HUMAN RESOURCES	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
We are "slow to hire and quick to fire."	1		10
We have an effective and formalized hiring system.	1		10
Our new hires are effectively trained in a systemized process.	1		10
All new employees read and understand the rules and procedures (usually found in an employee manual), our Mission, and our Vision.	1		10
Our employees are highly motivated.	1		10
We provide timely feedback to employees on their performance, and provide formal evaluations on a regular basis.	1		10
We have regular staff meetings, and we stick to a prepared agenda.	1		10

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HUMAN RESOURCES Cont'd	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
Our company-wide communication is excellent.	1		10
We have written job descriptions for every position.	1		10
We provide an atmosphere where our employees love coming to work.	1		10
YOUR BUSINESS SYSTEM	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
If I was absent from the business for six months, the business would continue to grow.	1		10
We maintain an updated organizational chart according to functions performed.	1		10
All business systems have been flowcharted.	1		10
We have a complete company Operations Manual where procedures are documented, and it is being constantly improved and updated.	1		10
All of the software we use is compatible, and no duplication of tasks is necessary.	1		10
We have identified all tasks in the business that could be handled routinely by systems.	1		10
All routines are followed, and we hold exceptions accountable.	1		10
Our system is as simple as possible.	1		10
I am able to work whenever I want, and do not worry about the business when I am not there.	1		10
I spend most of time improving my business system - not doing everyday tasks or putting out fires.	1		10
PROFIT MARGINS	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
We measure gross profit by job/product line, etc.	1		10
All expense components of the cost of sales are at their lowest point possible.	1		10

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We serve only those customers that we are able to make a maximum profit on.	1		10
PROFIT MARGINS Cont'd	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
We serve only those customers that we are able to make a maximum profit on.	1		10
We prepare budgets and stick to them.	1		10
Employees are compensated for producing higher profit margins	1		10
All fixed costs of operating the business are at a minimum.	1		10
We track equipment costs to ensure that equipment is used in the most efficient way possible.	1		10
We track our finance costs to ensure the lowest possible financial arrangements.	1		10
We use the best tax accountants to ensure the lowest possible tax bill.	1		10
FINANCIAL MANAGEMENT	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
Financial statements are current.	1		10
I understand my financial statements.	1		10
We review our financial statements at least on a monthly basis.	1		10
We use Key Performance Indicators to measure the effectiveness of marketing, sales, customer service, and other areas of the business	1		10
Our Cashflow is good and easily meets the demands of the business.	1		10
Our accounting procedures are well documented in the Operations Manual.	1		10
We meet with our accountant at least quarterly.	1		10

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FINANCIAL MANAGEMENT Cont'd	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
We maintain good banking relationships and receive great value for the lowest cost possible.	1		10
We review company liquidity, leverage, efficiency and profitability ratios on a regular basis.	1		10
We use the best accounting software for our industry.	1		10
LEADERSHIP	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
We have a written business plan, and we update it regularly.	1		10
We have a company Mission, Vision and Culture that the employees are excited about.	1		10
I spend most of my time working ON the business (planning, etc.) rather than IN the business (everyday tasks).	1		10
I am honest at all times with my employees.	1		10
I make the employees feel that they are a part of the team, and I collect their input regularly.	1		10
I hold my employees accountable for their job functions.	1		10
I am an excellent communicator with my staff.	1		10
I understand human behavioral modalities, and I adapt my behaviour to the person I am speaking with at the time.	1		10
I am familiar with motivational models, and I employ motivational strategies that are effective.	1		10
PERSONAL AND WORK/LIFE BALANCE	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
I know what I want out of my life and I move towards it every day.	1		10
I set goals and review them daily.	1		10

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I hardly ever have negative self-talk.	1		10
PERSONAL AND WORK/LIFE BALANCE Cont'd	<- Disagree Completely	Your Score (Fill In)	<- Disagree Completely
I exercise regularly.	1		10
I have a hobby that I enjoy, and I am active in it.	1		10
I spend plenty of quality time with my family.	1		10
I have friends that I enjoy socializing with, and I do it often.	1		10
My personal finances, retirement plans, insurance, and death planning are excellent.	1		10
I never have trouble sleeping.	1		10
I am proud of myself.	1		10
<i>Thank you for taking the time to fill out your Business Effectiveness Evaluation!</i>			

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