

Business Effectiveness Evaluation - Short Form © Soaring Eagles Business Advisors



Name: _____ Company: _____ Telephone: _____

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	Your Score	Agree
We have at least 10 active marketing strategies 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
We track all initial contacts and how they heard about us to assess marketing strategies.	1		10
SALES			
	Disagree	Your Score	Agree
We use scripts or a defined approach in all initial contacts with potential customers.	1		10
We have a proven, defined, and written sales system.	1		10
Our sales staff has regular, formal training on both product knowledge and sales skills.	1		10
We use a system to track sales to determine trends, strengths, etc.	1		10
CUSTOMER SERVICE			
	Disagree	Your Score	Agree
We consistently deliver on time, and when we are not on time, we notify the customer immediately.	1		10
We consistently "underpromise" and "overdeliver".	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
Our customer service is always consistent, and every contact with customers builds brand equity.	1		10
HUMAN RESOURCES			
	Disagree	Your Score	Agree
Everyone who works closely with us is familiar with our Mission statement and what our aims are.	1		10
We utilize "co-op-etition" and make partners of everyone we can to grow our business and theirs!	1		10
All employees have a clear Job Description and are hired, trained and evaluated per this profile.	1		10
We provide an atmosphere where our employees love coming to work.	1		10
YOUR BUSINESS SYSTEMS			
	Disagree	Your Score	Agree
If I was absent from the business for a period of time, the business would continue to grow.	1		10
I have a daily "To Do" system, and I update it and use it daily.	1		10
We have identified all tasks in the business that could be handled routinely by systems.	1		10
Our systems are as simple as possible, and we use them once they are set up.	1		10
PROFIT MARGINS			
	Disagree	Your Score	Agree
We know the profit margins of the various products and services we provide.	1		10
All expense components of the cost of sales are the lowest possible while not sacrificing results.	1		10
All but a small portion of our business is done at full price.	1		10
All fixed costs of operating the business are at a minimum while not diminishing the quality of the product or service.	1		10
FINANCIAL MANAGEMENT			
	Disagree	Your Score	Agree
Financial statements are current, and I understand them fully.	1		10
We keep the accounting current, and if we cannot do it ourselves, we seek professional help.	1		10
We use Key Performance Indicators to measure the effectiveness of marketing, sales, customer service, etc.	1		10
We use the best accounting software for our industry.	1		10
LEADERSHIP			
	Disagree	Your Score	Agree
We have a company Mission & Vision statement, communicate them to the appropriate people.	1		10
We set goals and action plans ourselves, and teach everyone on the staff to do the same.	1		10
I conduct my business with honesty, integrity, and congruency so I can always be trusted.	1		10
I am familiar with motivational models, and I employ motivational strategies that are effective.	1		10
PERSONAL AND WORK/LIFE BALANCE			
	Disagree	Your Score	Agree
I know what I want out of my life and I move towards it every day.	1		10
I take daily steps to maintain my mental, emotional, physical and spiritual health.	1		10
I have a good balance of work, play and rest. I work hard and balance it with the proper rest and rejuvenation.	1		10
I have a strong network of family and social connections who I spend time with and enjoy regularly.	1		10
TOTAL		0	