

August 10, 2012

To qualify for one free coaching session (up to 2 hours), please complete the checklist below to the best of your ability and email or mail back to Mike.

Business Diagnostic Checklist

*For questions 1-24, please write “Y” for Yes and “N” for No to the left of the question.

Sales

1. Did you hit your sales goals last year?
2. Do you have a sales target this year?
3. Are you on target to hit your sales goals this year?
4. Do you have a clearly written sales plan?
5. If you do have a written sales plan, do you refer to it and follow it?
6. Do you have multiple lead generation strategies?
7. Have you defined your ideal client?
8. Do you know your average \$ sale?
9. Do you have an average \$ sales goal?
10. Do you know the lifetime value of a new client?
11. Do you have a monthly sales goal?
12. Do you have corresponding sales activity goals (# appointments, # of quotes, etc)?
13. Do you track sales and activity (goals and actuals)?
14. Do you know your conversion ratio (# leads to get a sale)?
15. Do you listen to and/or read personal/professional development materials?
16. Do you have a clear sales process which you follow?
17. Do you schedule time for sales prospecting and follow through?
18. Do you use PHNs (personally handwritten notes)?
19. Do you present/quote/close in person?
20. Do you ask for referrals or have a formal referral strategy?
21. Do you have a social media plan, which you follow?

General

1. Do you have a business plan – which you follow?
2. Do you have clearly articulated job/role descriptions?
3. Do you conduct recurring 1:1s with direct reports?
4. Do you have an employee manual?
5. Do you have written SOPs (standard operating procedures)?
6. Do you know your monthly sales?
7. Do you know your monthly expenses?
8. Do you track margins?
9. Do you have a profit margin goal?
10. Do you have clear business goals set for this year?
11. Do you have a vision for your business?
12. Do you proactively market guarantees for your product/service?

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13. Do you test and measure your marketing \$ for clear ROI?
14. Do you work more than you would like?
15. Are you mostly in control over your daily schedule?
16. Are you taking enough vacation/personal time?
17. Can you take a vacation without worry when it comes to your business?
18. What was last year's annual sales revenue?
19. What were last year's annual expenses (fixed/overhead)?
20. Do you have any problems with staff / team turnover?
21. Do you have any trouble getting the right people?
22. Is moral high?
23. Can your business run without you - successfully?
24. Do you believe you are coachable?
25. In what three areas do you the right coaching would provide the most value?
 - a. _____
 - b. _____
 - c. _____
26. What has not been asked that you would like to offer?

Pre-Set Free Coaching Session Time and Location

Time: _____ Location: _____

Please scan and email to Mike Greene at mike@integrityworkscoaching.com or mail to:

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