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| **Operations\*** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Do you have an operations manual? | | | | | | | | | | | | | |  | | | | | Yes | | | | | | | | | | | |  | | | | No | | | | |
| How often do you and your managers meet to discuss your business’ operations? | |  | | | | Never | | | | | | | |  | | | | | Daily | | | | | | | | | | | | | | | | | | | | |
|  | | | | Weekly | | | | | | | |  | | | | | Monthly | | | | | | | | | | | | | | | | | | | | |
|  | | | | Annually | | | | | | | |  | | | | | From time to time | | | | | | | | | | | | | | | | | | | | |
| How do you make business decisions? | |  | | | | Gut | | | | | | | |  | | | | | Information / Analysis | | | | | | | | | | | | | | | | | | | | |
|  | | | | Experience | | | | | | | |  | | | | | Management Input | | | | | | | | | | | | | | | | | | | | |
| How much more could you produce or sell your current facilities and personnel? (300 words) | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| How well is the business running today compared to last year? (300 words) | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| How about the year before? (300 words) | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Do you have any documentation or process maps that describe your business operations in detail? | | | | | | | | | | | | | | | | | | | | | |  | | | | | | Yes | | | | | | |  | | | No | |
| What does your product line or services portfolio consist of? (500 words) | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Do you know how fast all your products / services are turning and at what margin? | | | | | | | | | | | | | | | | | | | | | |  | | | | | | | Yes | | | | | |  | | | No | |
| Do you have inventory control procedures? | | | | | | | | | | | | | | | | | | | | | |  | | | | | | | Yes | | | | | |  | | | No | |
| How does your management team resolve daily fires? |  | | Band-Aid Solutions | | | | | | | | | | | |  | | | | | Root Cause Analysis | | | | | | | | | | | | | | | | | | | |
|  | | Other (please describe) | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | |
| What key performance indicators (KPIs) are used to run the business? |  | | Throughput / Output | | | | | | | | | | | |  | | | | | Schedules | | | | | | | | | | | | | | | | | | | |
|  | | Cost of Goods Sold | | | | | | | | | | | |  | | | | | Asset Utilization | | | | | | | | | | | | | | | | | | | |
|  | | Actual vs. Estimated Hours | | | | | | | | | | | |  | | | | | Actual vs. Estimated Material Costs | | | | | | | | | | | | | | | | | | | |
|  | | Expenses | | | | | | | | | | | |  | | | | | Supplier Performance | | | | | | | | | | | | | | | | | | | |
|  | | Inventory Utilization | | | | | | | | | | | |  | | | | | Customer Satisfaction | | | | | | | | | | | | | | | | | | | |
|  | | Cycle Time | | | | | | | | | | | |  | | | | | Other | | | | | | | | | | | | | | | | | | | |
| If other, please describe: | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | |
| How do you measure quality? (150 words) | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| How do you measure customer satisfaction? (150 words) | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| How are customer complaints recorded? (150 words) | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| How are customer complaints resolved? (150 words) | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Do you have a customer complaint form in place? | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | | | |  | | | No | |
|  | | | | | | | | | | | | | | | | | | | | | | |  | | | |  | | | | | | |  | | |  | |
| **Sales** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Do you set measurable sales goals for your company and/or sales team? | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | | | |  | | | No | |
| Are you hitting your sales targets? | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | | | |  | | | No | |
| Are your average sales per customer increasing? | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | | | |  | | | No | |
| Do you use customer relationship software to streamline the sales process? | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | | | |  | | | No | |
| Do you have a process for post-sale follow-up? | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | | | |  | | | No | |
| If yes, does it generate additional business? | | | | | | | | | | | | | | | | | | | | | | |  | | | | Yes | | | | | | |  | | | No | |
| Which products or services provide the best profit margin? | | | | | **PRODUCT / SERVICE** | | | | | | | | | | | | | | | | **PROFIT MARGIN** | | | | | | | | | | | | | | | | | |
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| How many sales orders do you process each month? | | | | | | | | | |  | | | | | | | | | | |  | | | | I don’t know. | | | | | | | | | | | | | |
| What do you sell the most of and why? | | | | | **PRODUCT / SERVICE** | | | | | | | | | | | | | | | | **REASON** | | | | | | | | | | | | | | | | | |
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| Do you know the profit margin for each product / service? | | | | | | | | | | | | | | | | | | | | | | |  | | | Yes | | | | | | |  | | | No | | |
| How many salespeople do you employ? | | | | | **Total Number** | | | | | | | **Male** | | | | | | | | | | | | | | **Female** | | | | | | | | | | | | |
|  | | | | | | |  | | | | | | | | | | | | | |  | | | | | | | | | | | | |
| What is the status of your salespeople? | | | | | | | | **Status** | | | | | **Male** | | | | | | | | | | | | | | | | | **Female** | | | | | | | | |
| **Permanent** | | | | |  | | | | | | | | | | | | | | | | |  | | | | | | | | |
| **Temporary** | | | | |  | | | | | | | | | | | | | | | | |  | | | | | | | | |
| How are your sales personnel compensated? | | | | |  | | | Commission Base | | | | | | | | | |  | | | | | Fixed Monthly Salary | | | | | | | | | | | | | | | |
|  | | | Fixed Monthly Salary + Bonus | | | | | | | | | |  | | | | | Voluntary Work | | | | | | | | | | | | | | | |
|  | | | Other | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | |
| Are you generally satisfied with your sales team’s performance? | | | | | | | | | | | | | | | | | | | | | | |  | | | Yes | | | | | | |  | | | No | | |
| Are they generally satisfied with their performance? | | | | | | | | | | | | | | | | | | | | | | |  | | | Yes | | | | | | |  | | | No | | | |
| Describe any sales trends you observe in your business. (250 words) | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| What are the sales trends for your sector / industry? (250 words) | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Are your company’s sales meeting your expectations? | | | | | | | | | | | | | | | | | | | | | | |  | | | Yes | | | | | | |  | | | No | | | |
| If no, why not? (300 words) | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| What are the distribution methods / channels used? (300 words) | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| What process do you use to identify and quality leads? (500 words) | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Are you generating enough qualified leads? | | | | | | | | | | | | | | | | | | | | | | |  | | | Yes | | | | | | |  | | | No | | | |
| If no, why not? (300 words) | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| What is your market share? | | | | | | | |  | | | | | | | | | | | | | | | | | |  | | | | | | I have no idea. | | | | | | | |
| Who is the market leader? | | | | | | | |  | | | | | | | | | | | | | | | | | |  | | | | | | I have no idea. | | | | | | | |
| How does your profit margin compare with that of the market leader? (check one) | | | |  | | | Unsure / No idea | | | | | | | | | |  | | | | | | | Same | | | | | | | | | | | | | | | |
|  | | | Higher | | | | | | | | | | % | | | | | | |  | | | | | | | | | | | | | | | |
|  | | | Lower | | | | | | | | | | % | | | | | | |  | | | | | | | | | | | | | | | |
| Weekly basis sales tracking by | | | |  | | | Volume | | | | | | | | |  | | | | | | | | Profits | | | | | | | | | | | | | | | |
|  | | | Both | | | | | | | | |  | | | | | | | | We never do that | | | | | | | | | | | | | | | |
| What are your current annual sales? | | | | | | |  | | | | | | | | |  | | | | | | | | No idea. | | | | | | | | | | | | | | | |
| What were your annual sales last year? | | | | | | |  | | | | | | | | |  | | | | | | | | No idea | | | | | | | | | | | | | | | |
| What changes have you made in response to rising sales? (300 words) | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| What changes have you made in response to failing sales? (300 words) | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |