|  |
| --- |
| **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** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| 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** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| 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) |  |