

Business Evaluation – Service-Based Business

Company Name:
Name/Title:
Phone/Fax/Email:
Company Location/Branch Locations:
Number of Employees/Number of Sales People:
Website:

About Your Business

Please provide a general description of your business. What do you do?

Is your business currently: a. growing b. stagnant c. declining
By what percentage?

Which statement most accurately describes your situation? Why are you considering hiring a consultant?
(Circle one. As appropriate, note if the statement applies to your service offering(s) or to your organizational structure/employees).

1. We are the leader in our industry/area, about to raise the bar/set the next benchmark.
2. Things are going pretty well but we could do better.
3. We're going through lots of changes and need help/direction keeping up.
4. Something's broken – HELP!

What keeps you up at night?

About Your Organization

Name your key departments/departamental heads.

Are you aware of any issues between/within departments?

What are the biggest organizational challenges you face? Who seems to always be knocking on your door for help?

About Your Customers and Prospects

Why would a prospect favor you/your company over your competitors? What are the top five advantages of doing business with your company? Give specific reasons.

- 1.
- 2.
- 3.
- 4.
- 5.

How often do your customers use the types of services you offer? Daily, weekly, quarterly, annually, etc.?

Describe your target market in general along with a description of the average customer who uses your services.

In general:

Average customer:

Where do your prospects look first when they need your services (examples: yellow pages, referrals, trade magazines, etc.)

What's most important to your prospects when hiring a service company such as yours? List as many things as you can; list at least three. (Don't assume it's always price).

What are the biggest frustrations your prospects have when doing business with your industry/type of company? (You may not know this off the top of your head, but *think about it*).

If a close friend of yours needed to hire a company such as yours *and could not hire you*, what advice would you give him to help him make the best decision?

About Your Competition

What is your competitive environment like? Do you have direct competition? Indirect? Of what types? (Indirect competition can be do-it-yourself, or repair vs. replace, etc.)

List your top three competitors and their strengths/perceived strengths.

- 1.
- 2.
- 3.

About Your Sales and Marketing

Describe your sales and marketing process, step by step. (Do this even if you don't have an official sales force or marketing department; your customers are hearing about you from *somewhere* and they are interacting with *someone* in your organization. *How* this happens is much more important than the title(s) of *who* does it).

What are the biggest challenges you face in the areas of sales and marketing? Be specific. (Ex: my sales people are having a more difficult time making appointments and *here's why*...we offer the best service around but they always price shop us at the end of our contract, etc...)

What media do you use to communicate your messages to the marketplace? (Newspapers, radio, telemarketers, sales people, direct mail, events, etc.)

How has your marketing environment changed over the last one to five years? (Ex: we used to run ads/send mail/have salespeople, etc. that gave us all the business we needed, and those things don't work anymore, etc.)

How has the current economy affected your business?

About the Numbers

Use the following calculation to determine your current cost to generate a lead.

	Annual advertising expense*	
	Number of leads per month	
	Number of sales per month	
	Conversion ratio (C÷B)	
	Cost per lead (A÷B*12)	

*yellow page ads, local or national publication ads, website costs, networking groups, professional affiliations all count here.

Please record your sales volume history and goals for the next period.

	Sales in \$	Sales in units	Avg \$ per sale	Gross Profit %
Last Year				
Prior Year				
Year to date				
Highest Year:				
Expected				
Capacity				

Plan your customer profile. Use the following table to break down the major types of customers you currently have. Do you want to increase sales to any particular type or to all of them? (Is one type more desirable than the others?) By what percentage in the next 12 months?

Customer Type	Current % of total business	Avg \$ per sale	Desired %age Increase

Please send to us in advance your Company Literature and Marketing Materials (ads, brochures, flyers, etc.) for our pre-consultation analysis.

Use the space below to tell us anything else you think we need to know about your company:

Thank you for taking the time to complete this Business Evaluation.
Doing so helps us make the most of our time together.



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