

Current State

Score Your Sales and Marketing on a scale from 1 - 10

Score your operations on a scale from 1 - 10

The average of these two scores = Financial Health

Answer Y / N to the following to determine best way to increase revenue

Do you need to Sell More New Units of business?

Can you add additional / complimentary products or services? (List below)

Can you change internal processes to manage workflow more efficiently?

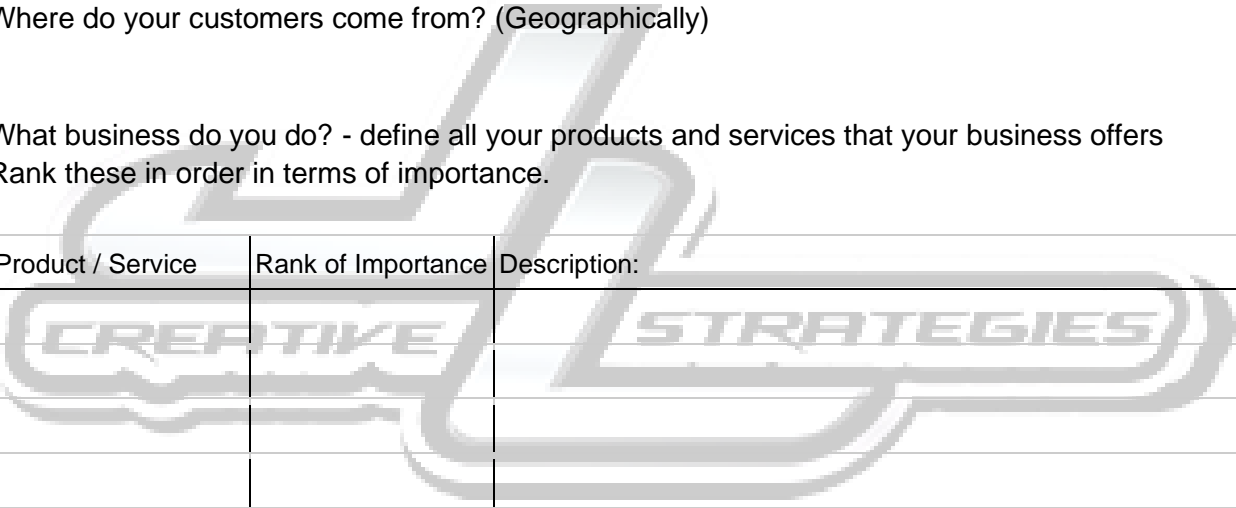
Can you cut costs of sales, operations, or Vendors

Services / Products outlined + Geography Served

Where do your customers come from? (Geographically)

What business do you do? - define all your products and services that your business offers
Rank these in order in terms of importance.

Product / Service	Rank of Importance	Description:



Define your customer and the potential problems they have for which you can provide a solution:



The competition and where you fall short

What differentiates you from your competition?

Who are your competitors?

What do they do that you like? Perhaps you can learn from your competition!

What do they do that you do, but better? Why?

Why would someone choose one of your competitors over you?

What reasons would you list that you can do better - i.e. what do you suck at?? (This is an important question for you to answer) Sometimes it is very hard to take a look in the mirror and really know what you do wrong.

Ask your staff what you can be doing better. As a business owner, you have to realize that you are not perfect. Your team knows your weaknesses, trust me. Ask them.

Getting into the Numbers

Gross Revenue last year, and perhaps the year prior as well.

What is your projected revenue this year?

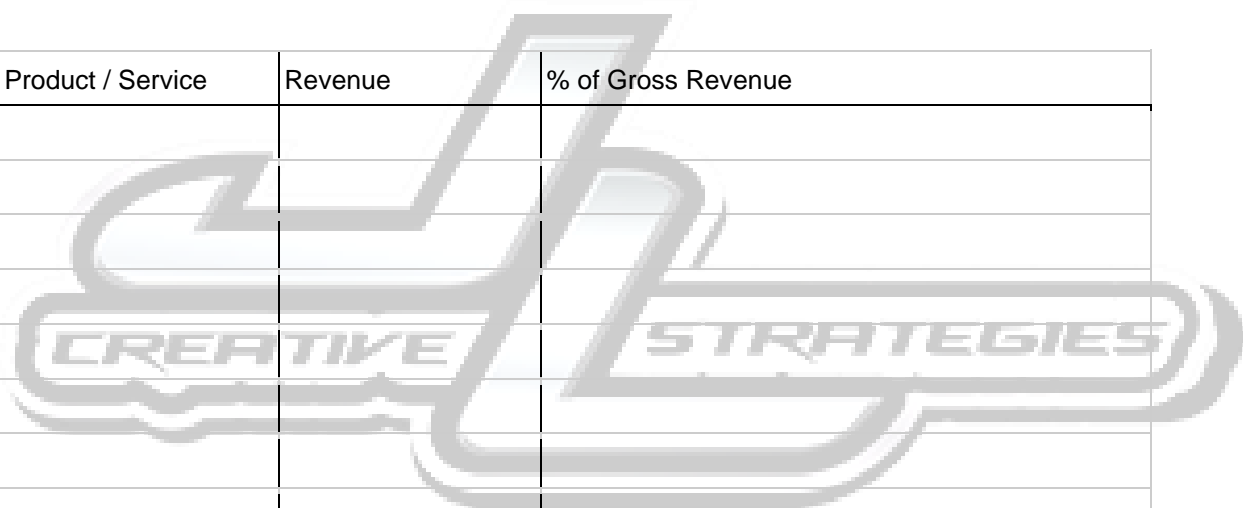
How much revenue, as a percentage, is coming from each of your offerings?

How much profit, as a percentage of gross profit, is coming from each revenue source?

Is there a loss leader (a product sold at a loss to attract customers)?

Is there a way to do more of what is MOST PROFITABLE?

Product / Service	Revenue	% of Gross Revenue

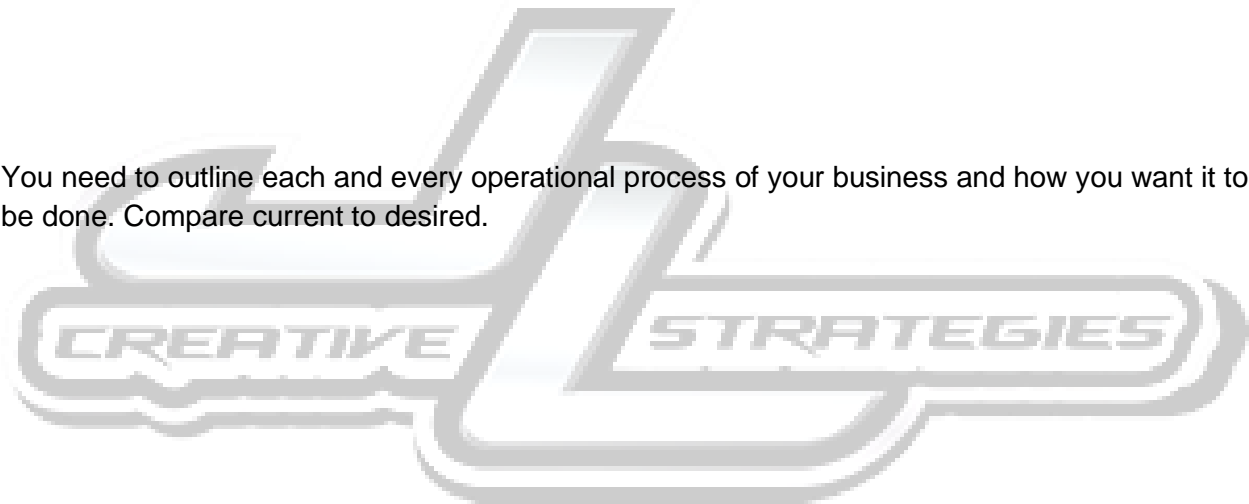
A large, semi-transparent watermark logo for 'Creative Strategies' is overlaid on the table. The logo features the words 'CREATIVE' and 'STRATEGIES' in a stylized, bold font, with a graphic element resembling a stylized 'C' or a checkmark behind the text.

Operations

In order to best view your operational processes, outline your business workflow in a flowchart. This would clearly show what happens when fulfilling a work order.

What are your operations and processes, and is everything documented or not?

You need to outline each and every operational process of your business and how you want it to be done. Compare current to desired.



Create a flowchart of what happens from beginning to end, from the time a customer calls to the time they pay and tell you they will refer business to you in the future!

What is your current capacity to bring on more business?

Sales Processes

Identify what kind of sales processes you have in place. Write down the steps you take to bring on a client and then ask your salespeople what their perception is. Maybe it needs some tweaking.

Does your marketing and sales collateral mesh? Is it consistent? List all of your marketing and sales collateral needs. What do you have already and what else is needed?



Advertising Planning

List all the advertising you are doing currently, the goal of the advertising you're doing, how much you are spending in a month, and the average number of leads it generates.

Advertising Tactic	Monthly Cost	Avg # Leads	Planned Goal

Underneath, make a list of advertising tactics that used to work for your business. For instance, what advertising platforms you used (yellow pages, trade magazines, print, etc.), how much did you spend in a month, estimate the number of monthly leads, and when and why you stopped spending money on that platform.

if your goal with a tactic is branding, list it as such.

Advertising Tactic	Monthly Cost	Avg # Leads	Planned Goal

Desired state

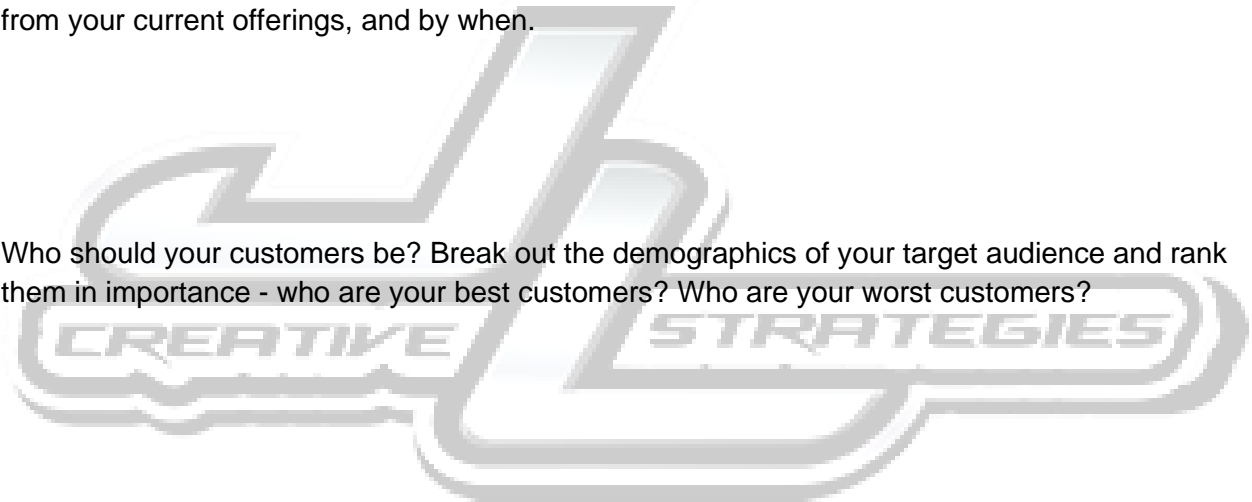
Do you want to maintain your current state and perhaps try to improve profitability, or are you looking to grow?

Where do you want revenue to be? Is there a product or service you wish to expand into?

What business do you want to be in? Make a list of products or services to add to or remove from your current offerings, and by when.

Who should your customers be? Break out the demographics of your target audience and rank them in importance - who are your best customers? Who are your worst customers?

Where do you want to service? Should you be going further out, or should you be eliminating clients beyond a certain distance because they are too expensive to service?



List a few things you will incorporate that your competition is already doing, some things they are not doing, and ways you feel you can outperform them. Make sure anything that needs changing or updating gets listed here with due dates for you or your team.

Know the numbers you wish to achieve.

Gross revenues 1-3 years out

Number of new business units needed to achieve per month or quarter.

How much internal growth will your sales team need? Or better yet, how can we increase the daily, weekly, monthly activity of your current team to achieve the new goals without hiring more people? (Refer to your sales process section)

What products or services should be of higher or lower focus based off of what you found in the current state exercise?

Operational efficiencies - what can be improved?

What processes will you change first? Prioritize!

Sales & Marketing Processes:

This is how you want things represented in the future. Do this after reading the sales section and / or talking to your team to find best practices currently happening and incorporating them into an adjusted model going forward.

Outline your future advertising and marketing upon completion of the program and incorporate all you learned in the following sections.

Tactic	Budget	Goal