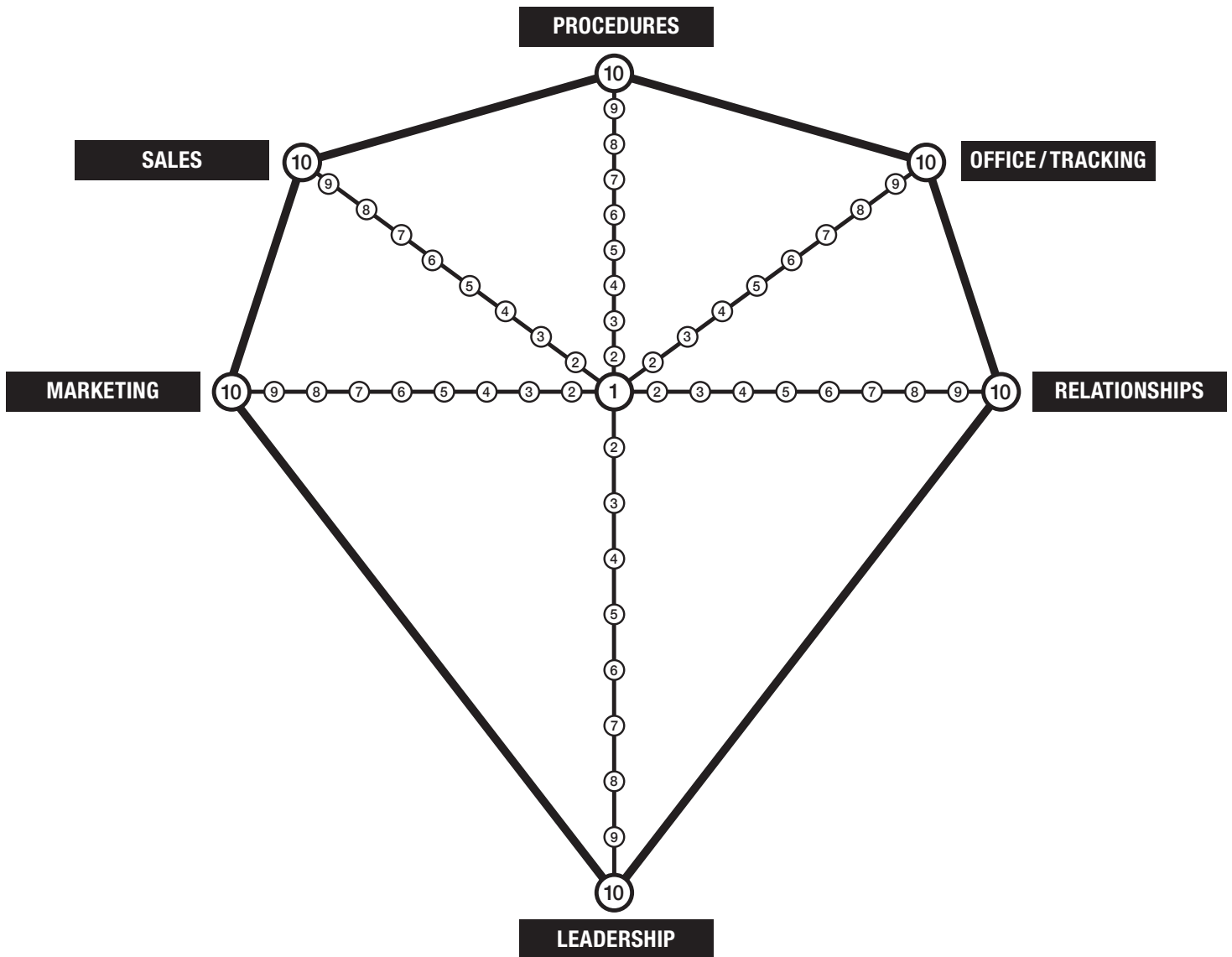


THE BUSINESS DIAMOND ASSESSMENT™



TOTAL SCORES

_____ Marketing _____ Sales _____ Procedures _____ Office/Tracking _____ Relationships _____ Leadership

Connect the dots on the diamond above using the total scores for each category.



THE BUSINESS DIAMOND ASSESSMENT™

Rate your business from 1 (not in existence) to 10 (completely handled) in each category below:

1. MARKETING

- I know the company's position in the marketplace and our unique strengths.
- Our referral program consistently brings in new customers and sales.
- We know the source of every lead and prospective customer.
- Our system tells us the revenue results from every advertising dollar and campaign.
- I have a Marketing Plan which includes a breakdown of coordinated actions, each with a schedule and person(s) accountable.
- My web site is professional, error-free and user-friendly.
- My web site and all on-line marketing is SEO (search-engine-optimized).
- We have at least one social media marketing platform working in our marketing system.
- We use our CRM (Customer Relationship Management) along with email to stay connected with our target market and customers.
- We market to existing customers and track revenue from repeat business.

_____ **Total ÷ 10=** _____ (put in the *MARKETING* section of the *Business Diamond™*)

2. SALES

- The sales conversation is consistent and professional, using a clear and concise sales script.
- Each team member accountable for sales has written goals and a system for tracking results.
- Sales pending and closed are tracked and reported daily.
- Incoming calls are answered immediately and professionally by a person or auto attendant.
- Inquiries and leads from our web site are responded to personally within two hours.
- Sales commissions and bonuses are competitive, insuring our company attracts and retains the best people.
- On-going training is part of our sales department system.
- We track results from a consistent effort to up-sell and down-sell our products and services.
- Sales efforts are market-driven; we monitor and identify changes and trends in our target customer base, revising the script and approach to reflect our commitment to stay responsive to customer needs.
- My sales team has the hardware, software and technology tools they need for their optimal performance and consistency across all sales centers.

_____ **Total ÷ 10=** _____ (put in the *SALES* section of the *Business Diamond™*)

3. PROCEDURES

- All company policies are in writing and every employee has a copy.
- Everyone is clear on the manner, prompt time-frame and method to handle customer issues.
- We have automated computer back-up systems in place and have security and firewall protection for all our data.
- Everyone knows exactly what they are accountable for and every job has one or more persons identified as accountable.
- Records management is consistent. Retention schedules are in place and adhered to, including requirements for tax and legal file archives and disposal.
- Our ordering system for inventory and supplies insures we never overpay.
- Our Systems Manual contains the written procedure for every system in the business and is updated as needed and reviewed quarterly.
- There are specific ways we set ourselves apart from competitors and these procedures are followed every day.
- Everything that needs to be measured is measured, reported and reviewed regularly.
- All 6 Business Diamond areas are reviewed every quarter to improve or streamline.

_____ **Total ÷ 10=** _____ (put in the *PROCEDURES* section of the *Business Diamond™*)

4. OFFICE/TRACKING

- I receive a daily sales report and review with staff.
- I have written company sales goals and share these with staff.
- Each sales rep has written goals which are tracked.
- I receive a report on sales activity including closing percentage.
- My accounts receivable and accounts payable are updated daily.
- With my budget and tax plan in place, there are no surprises.
- I review profit and loss reports weekly and monthly.
- My balance sheet is updated weekly and I review it weekly and monthly.
- Inventory reports including shrinkage and returns are updated monthly.
- I have a system in place to track the results of advertising and marketing efforts.

_____ **Total ÷ 10=** _____ (put in OFFICE/TRACKING section of the Business Diamond™)

5. RELATIONSHIPS

- I am satisfied with the number of full staff meetings we have –not too many or too few.
- My employees are aware of and feel appreciated for their value to the company and to me.
- I utilize the DISC Personality Assessment and know each team member's style.
- I know my DISC assessment results, hire complementary staff, and leverage my strengths.
- I have systems in place for employees to give and receive feedback.
- I consistently provide training and other assistance to encourage employees' growth.
- We have a CRM (Client Relationship Management) system in place and the database is current.
- My company has a customer appreciation program.
- I provide ways for customers to interact with our company and I foster a dynamic relationship.
- We are active in our community on a regular basis with outreach and other programs.

_____ **Total ÷ 10=** _____ (put in RELATIONSHIPS section of the Business Diamond™)

6. LEADERSHIP

- Every employee has a written copy of policies and systems related to their area of work.
- Everyone has a written job description including specific accountabilities.
- Operations guidelines for each department have been developed with manager input and are clear to everyone in each department.
- Team meetings are held regularly and everyone is on time and everyone participates.
- The organizational chart for the company is posted and reviewed annually or more often if the company is expanding or diversifying. We have a mission statement and a clear one-sentence version that everyone knows.
- Our pay scale, benefits and salaries are competitive and help us attract excellent people.
- My business plan is reviewed quarterly.
- My vision and goals are clear to me and are written down for frequent reference.
- Recruiting and training systems are in place, working to insure I have the best team possible.

_____ **Total ÷ 10=** _____ (put in the LEADERSHIP section of the Business Diamond™)