

As a marketing company we are passionate about helping businesses to become successful. Please take 15-30 minutes to honestly answer the following questions to evaluate where you may meet new challenges.

## You and Your Business

What is your main product/service? .....

Have you lost direction? ☐ Yes ☐ No

If yes, add to this grid

Strengths	Weaknesses
Opportunities	Threats

Are you located in the right area to optimise your business? ☐ Yes ☐ No ☐ Don't know

Would an additional branch attract more customers? ☐ Yes ☐ No ☐ Don't know

Are you constantly reviewing your business plan? ☐ Yes ☐ No

What are your short and long term goals?

Short term	Long term
1	1
2	2
3	3
4	4
5	5

Continued...

## Established Business Evaluation Continued...

### You and Your Business Continued...

Do you have a sales and marketing plan?

☐ Yes ☐ No

What is this month's activity? .....

Create your organisational chart



Do you have a sales team?

☐ Yes ☐ No

Are your team handling your sales effectively?

☐ Yes ☐ No ☐ Don't know

Are your sales team aware of their targets?

☐ Yes ☐ No ☐ Don't know

Have you been considering streamlining your workforce?

☐ Yes ☐ No ☐ Don't know

Are the right people in the right job?

☐ Yes ☐ No ☐ Don't know

### You and Your Money

What is your targeted profit margin? .....

What are your actual profit margins?

☐ 0-10% ☐ 11-25% ☐ 26-40% ☐ 41-50%+ ☐ Don't know

Are you achieving your sales projections and forecast?

☐ Yes ☐ No ☐ Don't know

How accurate are your financial records?

☐ Yes ☐ No ☐ Don't know

Do you require any additional sources of finance?

☐ Yes ☐ No ☐ Don't know

Are you struggling to take on new business due to cash flow problems?

☐ Yes ☐ No ☐ Don't know

Have you accurately identified your overheads?

☐ Yes ☐ No ☐ Don't know

Do have credit control procedures?

☐ Yes ☐ No

Where should you be investing and where should you be saving?

Where can I cut costs?	Where can I invest?
1	1
2	2
3	3
4	4
5	5

Continued...

## Established Business Evaluation Continued...

### You and Your Marketing

Does your company image say what you want it to say?

☐ Yes ☐ No ☐ Don't know

Do you have the right literature and tools?

☐ Yes ☐ No ☐ Don't know

Do you know your ideal customer demographics?

☐ Yes ☐ No ☐ Don't know

Do you know how to reach the client base you want to attract?

☐ Yes ☐ No ☐ Don't know

What are your customers saying about your company?

☐ Yes ☐ No ☐ Don't know

What is your customer retention rate?

☐ 0-25% ☐ 26-50% ☐ 51-75% ☐ 76-100% ☐ Don't Know

Are you dedicating time for prospecting?

☐ Yes ☐ No

How do you advertise your company? .....

What else are you doing to increase your customer base?

1
2
3
4
5

What was your ROI on your last quarter? .....

What is your unique selling point? .....

Are you missing important incoming sales calls?

☐ Yes ☐ No ☐ Don't know

Are your customers frustrated because they cannot reach you?

☐ Yes ☐ No ☐ Don't know

Are you following up on your quotations?

☐ Yes ☐ No

Do you often find, due to the nature of your job, that you cannot answer your phone?

☐ Yes ☐ No

Do you know who your competitors are?

☐ Yes ☐ No ☐ Don't know

Are you charging enough?

☐ Yes ☐ No ☐ Don't know

What separates you from your competition?

1
2
3
4
5

Continued...

## Established Business Evaluation Continued...

### You and Your Marketing Continued...

Have you diversified too much?  
Or not enough?

☐ Yes ☐ No ☐ Don't know  
☐ Yes ☐ No

Does your Customer Service Department act as an extension of your sales team?  
Do you have an after sales service in place?

☐ Yes ☐ No ☐ Don't know  
☐ Yes ☐ No

What do your customers really think about the services you provide?

☐ Yes ☐ No ☐ Don't know

Can you action any areas or weaknesses in any of the above subject areas  
that you are unsure about?

☐ Yes ☐ No ☐ Don't know

### Summary

We hope you found this questionnaire useful and thought provoking. Despite experience, knowledge or best intentions, we all need a little help along the way. Simply identifying your strengths and weaknesses will allow you to move in the right direction.

Please contact us for a no-obligation review of your business.



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