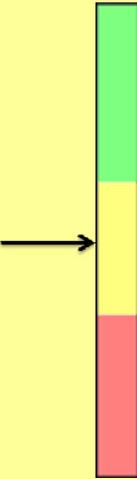
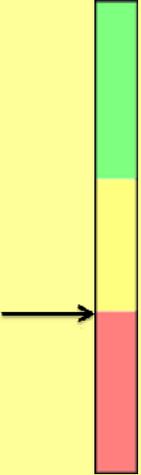
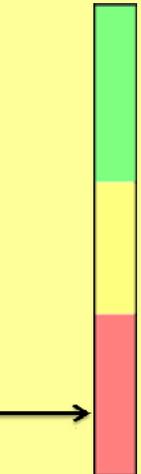


Lead Generation	Element Rating	Existing Strengths	Existing Challenges	Opportunities to impact	Tools to impact
		There are a sufficient number of leads generated each month to produce enough revenue to cover at least expenses	Not currently tracking the number of overall LEADS coming in	Tracking all leads, and determine their lead source to find out which sources creates the most leads	
		Three of the marketing campaigns/strategies are bringing in the majority of the customers	Minimal marketing is being done to existing customers to generate on-going business or referrals in a way that they can be tracked. New customer marketing is done via phonebook and internet	Determine the avg \$ sale per lead from each source and determine the most profitable customers	Brad Sugars Instant Leads, Instant Referrals, Instant Promotions, Instant Advertising
		Sales rep is generating business for ideal customers	Only one current sales rep proactively GENERATING leads	Determine the conversion rate from each lead source and campaign/strategy. Once all these metrics have been found, marketing budget and actions can be focused on spending effectively and what to do to increase leads being generated	Dan Kennedy: No B.S. Direct Marketing, The Ultimate Sales Letter, The Ultimate Marketing Plan,
		There is enough revenue coming in to be able to invest in quality lead generation sources	Low level of online reviews especially compared to number of service tickets, many are for a long time ago and some of them are not positive	Create an online reputation campaign, through FU calls and reviews to be used to increase internet brand and image	Word Press Web Design & Google AdWords for Dummies
		Lead generation seasonal fluxuation is known and can be prepared for	CRM being minimally used to generate new business from existing customers	Implement a system to track leads through the front desk personnel	Social Media Training at www.marismith.com
		There is an investment dedicated to generate leads (6% of yearly gross revenue used for lead generation marketing/advertising)	The quality of leads/customers is unknown when they call in, and not until they are complete is it known, but then not identified to the marketing campaign that brought them in	Rating the quality of leads A, B, C, D allows you to track which sources bring in the best customers	Jeffrey Gitomer: Little Black Book of Connections
		Desire to generate more leads is present and being looked at and acted upon	Quality of leads per campaign is unknown as well as exact number of leads per campaign	Build sales team to generate new leads. Train them in effective sales management and skills	
			CRM data is not completely up to date and not accurately maintained	Utilize CRM system to maximize existing customers and to come up with effective marketing strategies to use with existing customers for referrals or for additional services	
			Without knowing how many leads come from the various sources, it is not known if current marketing budget can be reduced or even if it is generating the ROI to pay for itself, or if there is a need to increase	Uncover and develop opportunities to work with businesses who could refer you your ideal customer	
			Front desk personnel are not accurately tracking leads calling in and appropriate referral source as calls come in	Using geographical analytics, uncovering ideal neighborhoods for services can create new opportunities for marketing	

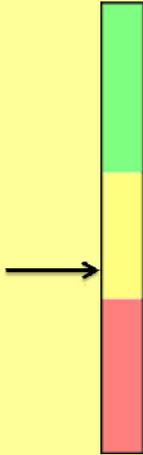
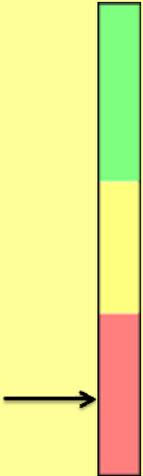
	Element Rating	Existing Strengths	Existing Challenges	Opportunities to impact	Tools to impact
<b>Lead Conversion</b>		Some data on how many customers are coming from has been tracked	Not knowing exactly where the leads are coming from makes it impossible to determine current lead conversion rates	Using existing customers from CRM with strategic marketing strategy can be effective at generating some referrals	
		High percentage of sales can be made without needing to offer a discount	Not knowing the leads generated by each source, nor the conversion for them, means that each strategy's effectiveness can't be determines	Build and develop sales team to uncover new lead sources and work with sources to create high conversion rate. Create a training curriculum for the sales team to be effective	Brad Sugars Instant Sales
		Sales rep conversion skills is at a adequate level of lead generation	Successful past customer marketing is not being utilized nor set up to maximize its use through the CRM. These are often high conversion rates	Track the conversions rates of different services to determine most effective/convertible services	Chet Holmes The Ultimate Sales Machine
			Due to lack of data, necessary training for sales people/sales actions can't be properly established	Once lead tracking system is implemented, tracking lead conversion will be very easy	Zig Ziglar: Secrets of Closing thye Sale, Selling 101
					Jeffrey Gitomer: The Little Red Book of Selling

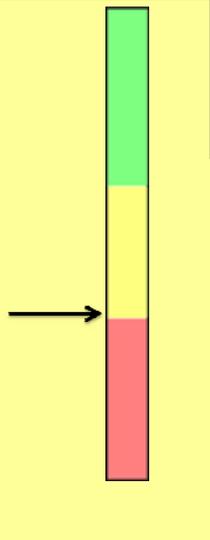
	Element Rating	Existing Strengths	Existing Challenges	Opportunities to impact	Tools to impact
<b>Average Dollar Sale</b>		Average Dollar Sale (ADS) is known for each of the 3 main services	Only one person targeting the highest value type of clients	Creating a targeted campaign for the highest spending customers, once identified and best way to reach them is established, can immediately impact the current number	
		Very high ability to increase the Avg \$ sale for commercial customers	Without complete client data, opportunity to analyze and uncover ways to upsell, cross sell, or target ideal/high value customers is impacted	Creating a formalized follow up process can increase the ADS when customers come back	Brad Sugars: Instant Sales
		Revenue currently can cover overhead	Nothing is solidly in place to increase the ADS in the upcoming months	With some processes in place, driver scheduling/appointments available per day can increase	
		Upsell and some cross sell ability, mostly with property managers and commercial properties.		By doing an inventory and sales process analysis, the extra/unused items can be located and processes for increasing the ADS and upsell ability can be determined	
		Once geographical targeted neighborhoods have been located, the ADS can increase for their needs, leading to high ability to target high value/ideal customers		Once the best marketing strategy for bringing in the ideal customer has been established, increase that strategy which would increase the ADS	
		Medium level of effectiveness with delivery/scheduling of services			

Number of Transactions	Element Rating	Existing Strengths	Existing Challenges	Opportunities to impact	Tools to impact
		A good amount of transactional data is captured	Testimonials are not up to date, and have very few compared to the number of customers seen	Creating a formalized follow up process can increase the number of times customers refer GSS, write an online review , or come back for future needs	
		With proper tracking, potential future clients needs can be identified/reminded	Follow up process isn't in place	By targeting the ideal customer (dog owners), it would increase the # of transactions greatly	Brad Sugars: Instant Repeat Business
		There is a semi-formalized sales process in place	Customer database isn't being fully utilized for marketing campaigns to create additional purchases	Using data base, create communication based marketing plans to bring customers in more often to purchase	Kenneth Varga: How to Get Customers to Call, Buy and Beg for More
		The sales person is highly motivated to produce sales as are the drain cleaners to be efficient in their work	Customer data is not consistently updated or used to contact customers about additional products or services	Putting in a tickler system and use as a sales opportunity	<a href="http://www.5min.com/Video/How-to-Get-Your-Customers-to-Buy-More-517389906">http://www.5min.com/Video/How-to-Get-Your-Customers-to-Buy-More-517389906</a>
		The newsletter is a great way of keeping in touch of people (I did not ask for the data associated with the newsletter)	Budget for past customer follow up isn't set aside	Creating WOW factors	
			A formalized sales process for maximum benefit isn't in place, which contributes to losing key data that can lead to multiple future transactions	Finding out which marketing strategies are working and not working well, money from less successful strategies can be redeployed to more successful strategies or to test new strategies	
		A tickler system isn't in place or being used	Finding businesses to partner with that can create an on-going customer stream of ideal and high value customers		

Overhead	Element Rating	Existing Strengths	Existing Challenges	Opportunities to impact	Tools to impact
		Data has been gathered about finances to be able to be analyzed	Expenses have not been analyzed in detail to reduce expenses	Creating a formal process for approval of plumbing purchases or inventory tracking will likely drastically reduce expenses there and increase profit margins	
		Finances have been kept, and have been updated.	Monthly budgets are not being fully utilized to reduce expenses and identify ways to increase profit, and is not being done proactively to provide that information in a timely matter to be fully used	Do a detailed and on-going analysis process of expenses to identify unneccessary or wasteful expenses and to decrease overall overhead	Brad Sugars: Instant Cash Flow, Instant Profits
		Revenue being spent on overhead is tracked, and is able to cover expenses	Inventory isn't being analyzed to identify wasteful inventory, or for maximizing information available by such analysis	Creating accurate budgets and using them to track and reduce expenses and how to create a road map to profitability	Eric Ries: The Lean Startup_
			Most effective routines and driver routes haven't been formalized yet (especially with plumbers, partially due to their lack of inventory tracking)	Looking at insurance rates, payroll, HR, marketing costs (and effectiveness), identify partners or potential new vendors that can supply better service for less money	Keith Cunningham: Keys to the Vault
			Purchasing is not being monitored or authorization required to do so for plumbers, and its highly likely there is extra money being spent.	Looking at analytics, reducing the cost of supply purchases by identifying which items are being purchased in which pattern to save money on supply and inventory cost	
			Payroll processing costs could be a bit high and not getting the best value	See what is being charged and see if there is a better service available	

	Element Rating	Existing Strengths	Existing Challenges	Opportunities to impact	Tools to impact
<b>Gross Profit Margin</b>		With data already gathered, current margins do exist and are being	Effort to increase margins on-goingly is not being done	Decrease operating overhead, decreasing costs of goods sold, improving purchasing patterns, and some operational changes can all increase overall gross profit margin	
		Most and least profitable services and employees has already been identified	The most profitable employees, services, operation methods are not being tracked and looked at to improve profit margins	Consistently tracking of PM on daily and weekly basis and creating a plan to close the cash gap	Brad Sugars: Instant Profits
		Current profit margin levels and revenue has the potential to grow and to generate profit & lots of it	Efforts to decrease expenses with goal to increase profit margins isn't being done, and with current roles no one is in place to do it	Ranking and tracking customers and their purchases can increase GPM by having higher selling transactions with less cost	Lawrence Steinmetz & William T Brooks: How to Sell at Margins Higher Than Your Competitors
		Guarantee is being used as a selling point (24/7 - not draining to your bank account)	Unknown how successful the guarantee is at closing customers	Upselling and cross selling can increase GPM	
		Profit margins are sufficient to generate profit with proper systems in place to reduce costs	Profit margins are only being tracked retroactively, and not proactively.		
			Profit margins are not consistently generating high profitability		
<b>Leverage Opportunities</b>		Outsourcing of certain business operations has been done, increasing internal ability to work on specific tasks	The process for strategic alliances hasn't been formalized and its effectiveness can be improved	Outsource non-revenue generating activities or allocate to administrative staff already on the team	
		There are other companies that interact with ideal customers	General Manager is unable to spend time to build and foster ideal partnerships until recently	Identify all possible leverage opportunities and create a plan to approach them with mutually beneficial arrangements	Verne Harnish: Mastering the Rockefeller Habits
		A few strategic alliances have already been created	GM spends far too much time in non-income producing activities and not focusing on growing the business	Create partnership with strategic alliances, and a team to manage those relationships once created	W. Chan Kim and Renee Mauborgne: Blue Ocean Strategy: How to Create Uncontested Market Space and Make Competition
		With the specificity of services offered, there are few conflicts with many businesses to partner with	Existing strategic alliance attempts have been unsuccessful at on-going revenue generation		Alexander Osterwalder and Yves Pigneur : Business Model Generation
					Michael E. Gerber : The E-Myth Revisited Napolean Hill: Think & Grow Rich, The 15 Principles of Success

	Element Rating	Existing Strengths	Existing Challenges	Opportunities to impact	Tools to impact
<b>Bookkeeping</b> 		Adequate record keeping and basic bookkeeping data entry	Bookkeeping and data is being entered and tracked retroactively. Leaving GM unable to accurately project when income is coming in and when checks can be released	Automation of payroll, bill pay, and invoicing would drastically increase the effective of the bookkeeping and the ability to get receivables in quicker and at a higher percentage	
	GM has knowledge of data and understands the various aspects of the finances	GM knows financial information, but is unsure how to impact it given her time constraints, and what to delegate while making sure its done properly	Getting financial data in detail and done proactively to be able to create an accurate cash flow budget and forecast to provide GM with ability to know what is coming in and when, and what bills are do when along with the peace of mind to pay them when they are due and see upcoming expenses	Keith Cunningham: Keys to the Vault	
	Some existing structures are in place and are set up to be able to grow	Specific detail is limited and not being used to expand profits and decrease expenses	Creating test and measures to constantly improve financial data, and bringing the same test and measures to inventory tracking and bookkeeping	Bookkeeping for Dummies	
	Payroll is partially automated, some bill payments are automated, and invoicing is somewhat automated	Full automation, with checks and balances is not in place, requiring managerial time to oversee	Identify any and all ways to decrease any expenses and put in structures and systems to reduce them	Jake Wilson: The Business Owner's Complete Guide to Bookkeeping	
	Cash flow budget not adequate to identify cash gap areas and uncover opportunities to close the gap		Using bookkeeping to track income, expenses, supplies purchasing, inventory, find spending trends and estimates on timing of purchases; all of which can save in spending	www.intuit.com	
	Little to no test and measures in place nor fully utilized to increase profitability and decrease expenses		Being proactive with bookkeeping, updating daily, and generating reports to use data frequently never getting behind with the data entry, collection or use of data		
	<b>Cash Flow Budgeting and Forecasting</b> 		Paid in advance most of the time	Data isn't being collected with enough detail proactively to be able to be provided with an accurate 6 month cash flow budget	With an accurate cash flow budget a plan to increase revenue and profits to a targeted amount in the next 6-12 month that can be identified, planned, and created to be fulfilled
There is a data collection process in place		There isn't a cash flow budget being monitored, consistently updated, and acted upon	Proactively compare actual vs budget on a daily, weekly, and monthly basis proactively	Brad Sugars: Instant Cash Flow	
Inventory tracking is in place for some departments		Lack of effective proactive financial management in place to get a cash flow budget and forecast that can be to grow business	Getting expected income and expenses projected will enable potential shortfalls to be identified with enough time to impact them, as well as being able to identify upcoming potential large expenses	Cash Flow & Business Plans for Dummies	
		Inventory tracking is not being done for plumbers, leaving a potentially large amount of unnecessary expenses unaccounted for	Tracking inventory for plumbers to reduce unnecessary spending, which over time is key to closing the cash flow budget cash gap	www.intuit.com	
			Will enable the GM to know what actions need to be taking to produce the desired amount of revenue and profit for the business		

Key Performance Indicators	Element Rating	Existing Strengths	Existing Challenges	Opportunities to impact	Tools to impact
		There is data to begin to identify KPI's	Key performance indicators have not been verified and tracked to assure proper tracking and that they are in fact	Identify/Confirm correct KPI's, create reports needed to be generated, and test and measure proactively	
		Some of the potential KPI's have been identifies	No reports have been created nor being reported on.	Create tracking systems for KPI's	Robert Kaplan & David Norton: The Balanced Scorecard
			Metrics for each product, service, team member, and marketing source haven't been identified	Create dashboards including any customizable modules specific to inventory and marketing campaign to the vet clinic	David Parmeter: Key Performance Indicators
			Some team members are potentially not on board with doing the extra work to implement the necessary tracking systems for KPI's to increase company's growth	Create which metrics to identify and how to measure them, as well as the tracking, reporting and updating system needed to use the data collected	Rasmussen, Bansal, Chen: Business Dashboards
				Create a plan to strategically use and implement the data collected on the metrics and KPI's and how to implement that data in the more efficient and effective places in the business's operations	