

## Established Business Evaluation

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.

Any business requires hard work, commitment and long hours. As you have now been trading for a while, you may want to move your business forward to the next level or simply improve certain areas of your business. Your success will depend on a number of factors, your knowledge, financial status, attitude, skills and the ability to be honest about a range of issues.

### You and Your Business

What is your company status? .....

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

Are you still enthusiastic with what you are doing?  Yes  No  Don't know

Have you lost direction?  Yes  No

Have you completed your SWOT analysis?  Yes  No

If yes, add to this grid

Strengths	Weaknesses
Opportunities	Threats

Are your premises presenting the right image for your company?  Yes  No  Don't know

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

Have you outgrown your premises?  Yes  No

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

Do you have a business plan?  Yes  No

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



(example)

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.



Discovery Park, Innovation House,  
Innovation Way, Sandwich, Kent CT13 9ND  
T: 01227 722722 / 01304 251421 / 020 7952 8292  
E: [reception@routemarketing.co.uk](mailto:reception@routemarketing.co.uk)  
W: [routemarketing.co.uk](http://routemarketing.co.uk)



Route Interiors, Fruitworks, 1-2 Jewry Lane,  
Canterbury, Kent CT1 2NP  
T: 01227 723723 / 0800 989 0033  
E: [amanda@routeinteriors.co.uk](mailto:amanda@routeinteriors.co.uk)  
W: [routeinteriors.co.uk](http://routeinteriors.co.uk)

Registered at Companies House, Cardiff, No: 04232432 Registered Office: 1276-1278 Greenford Road, Greenford, Middlesex, UB6 0HH