

# Metro's Business Development Analysis

Turn your Vision into Results

Name:	Referred by:
Business Name & Address:	Phone: Cell: Fax: Email:

This following questionnaire will help you define some basic information about your business, about your concerns, about your vision - what you really want to create for yourself.

This analysis includes identifying how you can produce extraordinary results in your business and how you can take your business to the next level.

By looking at your business through someone else's eyes, you will start to see new ways for increasing personal income, business profits and productivity for yourself and others. You'll start to see how easy it is to do your passion in life - do what you love -- without working yourself to exhaustion or constantly wanting more, but never being clear on quite how to make it happen.

I come to you with 25 years of considerable experience. Having built and run several profitable businesses in different industries including health and wellness, I bring a strong set of integrated skills and experience to the small business and professional practice. To grow your business and have it thrive beyond your wildest dreams, takes a combination of strong belief and vision, expertise in your industry/profession and strong business and marketing skills with systems, structures and fundamentals.

To grow a strong business you need: **Information** (what to do and how to do it) and **Systems** (structures and procedures that will consistently produce practical, measurable, repeatable results.) Because these are missing, most small business owners are paying dearly... by working much too hard, for much too little.

By completing your own analysis, together we can identify specific areas of opportunity where you can grow your business.

My mission: Significantly increase your revenue while increasing your level of personal freedom and passion for what you do.

I welcome the opportunity to serve you. Thank you for participating in this process.

*Renaë Bechthold*

Metro Massage | Metro Yoga | Metro Pilates | Metro Personal Training | Metro Coaching | Metro Small Business

A Metro Marketing & Media Company | 5030 Camino del la Siesta #402 | San Diego, CA 92108  
Tel. 858-689-9777 | Fax. 858-689-9977 | email: renae@metromm.com

# Confidential Questionnaire:

Please complete this confidential questionnaire, sign, and date and return it to me via fax to: 858-689-9977 or email to: renae@metromm.com

When did you start your business?	
What are your strengths, skills or training in?	
What makes your business unique from your competitors?	
What is your average monthly revenue? \$ _____	What would you like it to be? \$ _____
How many sessions do you have per month now? _____	How many would you like to have? _____
How many new clients do you get per month on average? _____	

## BUSINESS CONCERNS

**Directions:** In the spaces below, write in the appropriate number from a scale of 1 to 2 -- 2 being a significant concern or what you need the most.

**Scale:** 1 Not really concerned about or have it handled.  
2 I need to improve this or very concerned or want to create this.

### SALES CONCERNS

- \_\_\_\_\_ 1. More new customers.
- \_\_\_\_\_ 2. Better customer retention.
- \_\_\_\_\_ 3. Better conversion from lead to customer.
- \_\_\_\_\_ 4. Better profit.
- \_\_\_\_\_ 5. Sales have been up and down.
- \_\_\_\_\_ 6. Know how to sell better.
- \_\_\_\_\_ 7. Measure sales performance.
- \_\_\_\_\_ 8. I do most/all of the sales myself.

### PRODUCTION/OPERATIONAL CONCERNS

- \_\_\_\_\_ 1. Increasing my company productivity.
- \_\_\_\_\_ 2. Eliminate customer complaints/turnover.
- \_\_\_\_\_ 3. Decreasing service or production costs.
- \_\_\_\_\_ 4. Written work procedures so any process can be taught to others.
- \_\_\_\_\_ 5. Calculate and evaluate production costs?
- \_\_\_\_\_ 6. Ensuring customers are satisfied?

### MARKETING CONCERNS

- \_\_\_\_\_ 1. Better marketing materials.
- \_\_\_\_\_ 2. More quality, prospective clients.
- \_\_\_\_\_ 3. An effective strategic marketing plan that that works without me.
- \_\_\_\_\_ 4. Know what types of marketing & advertising techniques work best to produce results.
- \_\_\_\_\_ 5. Create an image and consistent brand for my business to attract more customers?
- \_\_\_\_\_ 6. Setting up or integrating current off-line and on-line marketing strategies with measurable ROI.
- \_\_\_\_\_ 7. A clear consistent strategic plan for growing my business.

### FINANCIAL CONCERNS

- \_\_\_\_\_ 1. I don't have enough money/capital.
- \_\_\_\_\_ 2. Control my expenses.
- \_\_\_\_\_ 3. I don't know where I stand financially.
- \_\_\_\_\_ 4. I'm not making a profit.
- \_\_\_\_\_ 5. I don't get paid on time.
- \_\_\_\_\_ 6. Organizing and setting up documents and records I need to operate my business profitably.
- \_\_\_\_\_ 7. Define financial goals of company and with budget to attain them.
- \_\_\_\_\_ 8. Know what my future costs and revenue will be.

## SYSTEMS: Structures - Processes - Procedures

SALES SYSTEMS	Yes	No	N/A
<i>Do you have a system for...?</i>			
1. Creating a scripted presentation that can be used consistently with all customers/prospects?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Designing a sales presentation to uncover your customer's needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Understanding how buying decisions are made and developing a sales process based on those principles?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Establishing sales goals and tracking the effectiveness of your sales process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Developing responses to your customers' most asked questions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Identifying, evaluating, and correcting problems in your sales process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Tracking and evaluating sale performance based on regular reports?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MARKETING SYSTEMS	Yes	No	N/A
<i>Do you have a system for...?</i>			
9. Insuring that your marketing process is reaching your intended customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Determining the number of new prospects you need?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Getting to know who your preferred customers are and directing your marketing toward them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Designing an effective advertisement to produce results?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Creating an image and consistent brand for your business to attract more customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Determining the most effective advertisement to produce results?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Creating a well organized strategic marketing plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Tracking and evaluating the results of your advertising/marketing efforts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Effective online marketing strategies that produce the kind of leads and sales you want.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MANAGEMENT SYSTEMS	Yes	No	N/A
<i>Do you have a system for...?</i>			
18. Planning your work to allow the most productive use of time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Define the organizational structure of your business to evaluate its effectiveness?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Organizing your company to assure your business will run effectively in your absence?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Scheduling your work to enable you to produce more in less time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Analyzing and evaluating your business to determine if expansion is feasible and/or desirable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Organizing, processing and storing your paperwork in an efficient and accessible manner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Categorizing, organizing and setting up your files?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Organizing and maintaining an orderly workplace?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Assessing current and future operating needs to determine whether any new or additional equipment/materials are necessary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PRODUCTION SYSTEMS	Yes	No	N/A
<i>Do you have a system for...?</i>			
28. Scheduling work or jobs to assure timely completion?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Identifying and tracking high customer turnover?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. Scheduling workers to make more efficient use of their time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31. Writing down the work procedures so that they can be taught to others?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. Calculating how long it will take to complete a job or perform your service for your customers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31. Calculating and evaluating your production costs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. Controlling all customer activities to assure the best customer service?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34. Forecasting workloads to allow you to schedule enough work to keep busy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35. Ensuring your customers are satisfied?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**FINANCE SYSTEMS**

Yes No N/A

*Do you have a system for...?*

- 36. Creating profit/loss documents?  Yes  No  N/A
- 37. Forecasting income so you can pay your bills on a timely basis?  Yes  No  N/A
- 38. Preparing financial statement to set up and sound credit relationships?  Yes  No  N/A
- 39. Forecasting future income and monitoring expenses to evaluate your profit status?  Yes  No  N/A
- 40. Evaluating overhead cost to determine whether additional staff are feasible and /or necessary?  Yes  No  N/A
- 41. Recording your daily cash receipts and creating reports?  Yes  No  N/A
- 42. Calculating and tracking your operational costs?  Yes  No  N/A
- 43. Planning future equipment or material needs?  Yes  No  N/A
- 44. Collecting money owed to you in a systematic manner?  Yes  No  N/A
- 45. Defining the overall financial goals of your company and setting a budget to attain them?  Yes  No  N/A
- 46. Identifying and setting up those documents and records you need to operate your business profitably?  Yes  No  N/A

What are three of your greatest concerns at this time?

What specifically would you like your company/business/practice to develop into in the next year? If you could have it exactly the way you wanted it, what would it look like?

What are your top 3 goals at this time?

What do feel are the major obstacles standing your way? (please be specific)