

# Strategic Diagnostic for Business Owners Toolkit

by Jeff Burrows

A special report from [WealthBuildersReports.com](http://WealthBuildersReports.com)



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## You have to push through that zone to be at the top of your game

You are about to participate in an exciting and productive process – the completion of a complimentary Analysis of your business. Regardless of the level of development in your business, whether you're a home start-up or have been managing your own business for years, we ask that you fill out the attached form to the best of your ability. This form will be used as a sounding board by you and one of our Business Development Specialists – a starting point, if you will, for your free Strategic Business Diagnostic.

Thousands of small business owners have taken advantage of this opportunity by completing this Toolkit. By looking at their business through someone else's eyes, most have come to realize new opportunities for increasing personal income, business profits, and productivity.

To assist us in understanding you and your business better, you should complete the checklist of key frustrations. This will help us to identify the specific problems you experience on a day-to-day basis in the seven key areas of your business. Then share with us what documented systems you do have as well as your goals and objectives.

It is important for you to understand that we come to your business with a considerable amount of experience in eliminating the problems of most small business owners. That experience has created a very specific point of view – that problems in business are caused by the absence of two essential things: 1) information (what needs to be done and how to do it), and 2) systems (the processes and procedures through which that information is implemented in the business to produce practical and quantifiable results).

No one understands the plight of the busy entrepreneur more than we do. In fact, we've made it our business to educate business owners how to get control of their business "and their lives" through a proven process called Mastery. We listen intently to understand the truth about the current condition of your business.

What we have found to be true is that most small businesses simply don't work; the people who own them do, and they are working far more than they should for the return they are getting.

## **Results**

Once you have completed the form, your Business Development Specialist will help you analyze the results – first, by identifying specific areas of opportunity to increase your control over your business; and, second, by establishing priorities for pursuing these opportunities together, should such a relationship be justified by what we find together.

Whatever transpires between us, we welcome this opportunity to be of service to you. We trust the process will provide you with a renewed sense of clarity, direction, and momentum, the three essential prerequisites for the development of your business, as well as your life.

# JEFFBURROW'S DIAGNOSTIC TOOLKIT

Take the time to discover ...  
How many of these frustrations you are experiencing?

Name: \_\_\_\_\_ (x the statements that apply to you)

## 1. Leadership

- I'm so busy that I often lose sight of what's important to me.
- I can't seem to find the right balance between my work and my personal life.
- I don't have a clear idea of what I want from my business.
- My employees don't have a clear picture of what this business is all about.
- I don't know how to gauge whether my business is on the right track.
- I'm so busy fighting fires, I never seem to get anything done.
- I don't know how to motivate others to do their best.
- I don't feel like I'm a true leader.
- I don't feel like I'm in control of how I spend my time.
- I work too many hours.

## 2. Marketing

- My company doesn't do enough marketing.
- I don't know what type of person is most likely to buy from my company.
- I don't know what distinguishes us from our competitors.
- I don't think that my potential customers know what distinguishes us from our competitors.
- I don't think that our current customers know what distinguishes us from our competitors.
- I don't think our marketing program is effective.
- I don't know how to determine whether our marketing is effective.
- We don't have a clearly defined company image.
- Our marketing doesn't have a clear, consistent image.
- I don't know how to, or think that we can't, use target marketing.
- I don't know how to, or we don't, develop and use a marketing plan.

### 3. Management

- My company is disorganized, work accountabilities and reporting relationships are not clear.
- My employees rarely know what they should be doing. They need constant supervision.
- My employees know what to do, but the quality of their work is far below what I would like.
- I'd be in big trouble if a certain key person(s) in my business were to leave.
- I'm not able to find and keep good employees on a consistent basis.
- Staff training is a big problem in my company.
- Work never gets done the same way twice.
- Employee problems take up too much of my time.
- We don't know how to do, or don't take the time for, employee performance evaluations.
- My managers don't know how to manage.
- Employees frequently complain about their managers, and/or managers complain about their employees.

### 4. Money

- I don't feel that I'm in control of my company's money.
- I'm not satisfied with our company's financial record keeping.
- I frequently don't have enough cash to meet current needs.
- I don't know what my financial goals are.
- I'm not sure where we stand in relation to our financial goals.
- I don't receive regular financial statements.
- I receive regular financial statements, but don't feel that I know what to look for.
- I'm not achieving the profit margins I would like.
- I don't know what profit margins are, or why they are important.
- I don't know what my business is worth.
- I don't know how to prepare or use a budget.

### 5. Client Fulfillment

- I don't know whether our clients are satisfied or not.
- I don't think the quality of our product/service is as high as it should be.
- The quality of our product/service is inconsistent; sometimes it's very good and sometimes it's not.
- I don't understand why our product/service quality is so inconsistent.
- I don't know what our client retention rate is.

- We lose too many clients for no good reason.
- I often worry that we won't complete the client's job on time.
- Capacity planning is a problem for me.
- I don't know how to improve our client fulfillment systems.
- We don't have any or enough client fulfillment systems; things just seem to get done by individuals who "know" in their heads what to do.
- We're constantly putting out fires.

## 6. Lead Generation

- Not having enough leads is a big problem for me.
- I don't know if we're doing enough advertising.
- I don't know how to evaluate the effectiveness of our advertising.
- We spend too much on advertising and get too little return.
- I don't know the best way for my company to generate leads.
- I don't know where my best leads come from.
- We don't know how to ask for or get referrals.
- I don't know what the best methods are for reaching the people I want to reach.
- We don't have a large enough budget to generate leads effectively.
- Lead generation is too complicated for a company like mine.
- We don't know how to implement or evaluate our lead generation activities.

## 7. Lead Conversion

- We're not making enough sales.
- My salespeople are not able to generate predictable results each month.
- I don't know how to sell our product/service as effectively as I would like.
- I know how to sell our product/service, but nobody else in the company does.
- I believe that you can't teach someone to be a good salesperson; you're either born with the ability or you're not.
- I don't know, or don't care, what our lead conversion rate is.
- My salespeople all sell our product/service differently.
- We don't know how to overcome objections
- I'm not sure what I can do to increase sales from my existing customers.
- I have no way to measure the effectiveness of our sales effort.
- I don't know how to manage salespeople; I often don't know what they are doing.

## What Are Your Goals and Objectives?

**W**hat would you like your company to become, or develop into in the next 3 to5 years? In the next 10 years? In other words, what is your dream or vision for your business? How would you like it to look if you could have it precisely on your terms?

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**I**f the business were operating just as you describe it, what would you get out of it and what would your role be? In other words, what are your personal objectives?

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**W**hat do you feel are the major obstacles standing in your way?

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### Please complete the following:

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

No. of Employee(s) \_\_\_\_\_ No. of Location(s) \_\_\_\_\_

No. of Owner(s) \_\_\_\_\_ Years in Business \_\_\_\_\_

Annual Gross Revenues \$ \_\_\_\_\_

Complete fully and email to: PO Box 2854 Carefree, AZ 85377

Fax to: 480 452 0556

For Your Strategic Diagnostic Coaching email : [Jeff@jeffburrows.com](mailto:Jeff@jeffburrows.com)

## What Documented Systems Do You Have?

### 1. Leadership

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### 2. Marketing

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### 3. Management

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### 4. Money

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### 5. Client Fulfillment

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### 6. Lead Generation

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### 7. Lead Conversion

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