

# COMPANY BUSINESS ASSESSMENT

How accurately do the following statements describe your team?

**1 being the lowest level of accuracy and 10 the highest.**

## Mindset/Money

1. My team sees their job as a career, not a short term financial fix.

1    2    3    4    5    6    7    8    9    10

2. My team maintains high energy and is highly motivated.

1    2    3    4    5    6    7    8    9    10

3. Leadership team and staff have financial plan in place (wealth creation).

1    2    3    4    5    6    7    8    9    10

4. Team is well aligned in their goals and knows how to execute as a team.

1    2    3    4    5    6    7    8    9    10

5. Team has a "can do" attitude.

1    2    3    4    5    6    7    8    9    10

6. Company culture is positive and united. Team is aware of the company mission and goals.

1    2    3    4    5    6    7    8    9    10

7. Team takes massive action and goes above and beyond in their efforts to service clients.

1    2    3    4    5    6    7    8    9    10

8. Team is creative when it comes to creating business opportunities and the way they service their customers.

1    2    3    4    5    6    7    8    9    10

9. Staff possesses problem-solving skills and displays confidence in selecting products/ solutions for clients.

1    2    3    4    5    6    7    8    9    10

10. Everyone in the company embraces the sales culture.

1    2    3    4    5    6    7    8    9    10

11. Staff is efficient in managing their time and prioritizing tasks.

1    2    3    4    5    6    7    8    9    10

12. Employee engagement is high.

1    2    3    4    5    6    7    8    9    10

13. Team is more focused on results than efforts.

1    2    3    4    5    6    7    8    9    10

How accurately do the following statements describe your team?  
**1 being the lowest level of accuracy and 10 the highest.**

## Marketing

14. Our company is well known in the space.

1     2     3     4     5     6     7     8     9     10

15. We have a clearly established brand message (vision statement, mission statement, core values, tagline, brand pillars, value proposition).

1     2     3     4     5     6     7     8     9     10

16. We have a heavy focus on promotion.

1     2     3     4     5     6     7     8     9     10

17. Majority of our leads (business) come from digital promotion.

1     2     3     4     5     6     7     8     9     10

18. We know how to create relevant content for promotion.

1     2     3     4     5     6     7     8     9     10

19. We have an efficient marketing plan in place (we know exactly what product/offer we promote, through what channel and when).

1     2     3     4     5     6     7     8     9     10

20. We have established our perfect customer persona.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

21. Marketing and advertising play a significant role in our business cycle.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

22. We are consistent and frequent (3+ outreaches a day - SM, email, etc.) in our promotion.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

23. We are very efficient in multipurposing the promotional content.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

24. We have a high content engagement rate.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

25. We often hear from prospects that we promote too much.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

26. All our offers/content have a clear "call to action".

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5	6	7	8	9	10

How accurately do the following statements describe your team?  
**1 being the lowest level of accuracy and 10 the highest.**

## Sales

27. Team is confident and productive at handling incoming and outgoing calls.

1    2    3    4    5    6    7    8    9    10

28. Sales team meets daily to establish daily targets and game plan.

1    2    3    4    5    6    7    8    9    10

29. Team has time reserved each day to follow up deals that didn't close.

1    2    3    4    5    6    7    8    9    10

30. Our organization has a well established and clear sales process.

1    2    3    4    5    6    7    8    9    10

31. All team members follow the sales process at all times.

1    2    3    4    5    6    7    8    9    10

32. All team members take active role in prospecting and creating business opportunities.

1    2    3    4    5    6    7    8    9    10

33. Our average lead conversion is high.

1    2    3    4    5    6    7    8    9    10

34. We have a lot of repeat customers (high transaction frequency).

1    2    3    4    5    6    7    8    9    10

35. Team always asks the right questions to land clients on best product.

1    2    3    4    5    6    7    8    9    10

36. Team is confident in handling objections and is persistent in the sales cycle.

1    2    3    4    5    6    7    8    9    10

37. Team possesses great product knowledge and is able to perform efficient demonstrations, ensuring the product is exactly what the client needs.

1    2    3    4    5    6    7    8    9    10

38. We handle digital customers different than in-person sales.

1    2    3    4    5    6    7    8    9    10

39. Every client interaction results in a written offer.

1    2    3    4    5    6    7    8    9    10

In the section below, input your assessment scores for each statement. This interactive PDF document has been formatted to calculate your final scores and to determine how you and your company are doing. If doing it manually, follow the instructions below.

## Money/Mindset

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_

**Total Sum:** \_\_\_\_\_

**Percentage Score:**

**Total Sum:** \_\_\_\_ ÷ 1.3 = \_\_\_\_

## Marketing

14. \_\_\_\_\_
15. \_\_\_\_\_
16. \_\_\_\_\_
17. \_\_\_\_\_
18. \_\_\_\_\_
19. \_\_\_\_\_
20. \_\_\_\_\_
21. \_\_\_\_\_
22. \_\_\_\_\_
23. \_\_\_\_\_
24. \_\_\_\_\_
25. \_\_\_\_\_
26. \_\_\_\_\_

**Total Sum:** \_\_\_\_\_

**Percentage Score:**

**Total Sum:** \_\_\_\_ ÷ 1.3 = \_\_\_\_

## Sales

27. \_\_\_\_\_
28. \_\_\_\_\_
29. \_\_\_\_\_
30. \_\_\_\_\_
31. \_\_\_\_\_
32. \_\_\_\_\_
33. \_\_\_\_\_
34. \_\_\_\_\_
35. \_\_\_\_\_
36. \_\_\_\_\_
37. \_\_\_\_\_
38. \_\_\_\_\_
39. \_\_\_\_\_

**Total Sum:** \_\_\_\_\_

**Percentage Score:**

**Total Sum:** \_\_\_\_ ÷ 1.3 = \_\_\_\_

**For manual calculations** - determine the average score (sum of 3 scores above and divide by 3).

Example: Your total scores are 75% (Money/Mindset), 80% (Marketing), 70% (Sales).  $(75 + 80 + 70) \div 3 = 75\%$

**Your Total Score:** \_\_\_\_\_

*Average Cardone Client Score: 92.4%.*