

# BUSINESS VITAL DIAGNOSTIC



Business Name:

**What is it that you provide?** *(describe what you do/offer)*

**Annual Turnover**

Last 12 months:	<input type="text"/>	Previous 12 months:	<input type="text"/>
<b>Expenses</b> (Last 12m):	<input type="text"/>	Previous 12 m:	<input type="text"/>
<b>Net Profit</b> (Last 12m):	<input type="text"/>	Previous 12 m:	<input type="text"/>

**Monthly Turnover** (last 12 months)

JAN	FEB	MAR	APR	MAY	JUN
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
JUL	AUG	SEP	OCT	NOV	DEC
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Target turnover** next 12 months:

**Average Transaction Value** *(spend per customer):*

**What percentage of annual turnover does your biggest client account for?**

**What is the current mix of your business?** *(expressed as a percentage)*

Retail	<input type="text"/>	Residential	<input type="text"/>	Government	<input type="text"/>
Commercial	<input type="text"/>	Industrial	<input type="text"/>	Public sector	<input type="text"/>
Corporate	<input type="text"/>	Resources	<input type="text"/>	Other	<input type="text"/>

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**Highest Priced Product/Service:**

for:

**Lowest Priced Product/Service:**

for:

**Top 5 best-selling products/services** *(if applicable):*

- 1
- 2
- 3
- 4
- 5

**Bottom 5 lowest-selling products/services** *(if applicable):*

- 1
- 2
- 3
- 4
- 5

**Product/service with highest profit margin:**

Margin amount:

**Number of leads obtained each week:**

**Cost per lead:**

**Conversion rate** *(number of sales/number of leads):*

**Return on investment** *(revenue generated minus cost of leads):*

**Marketing spend** *(last 12 months):*

**Marketing budget** *(next 12 months):*

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**What do you currently do to generate more business/customers?**

**What percentage of your customers are repeat customers?**

**What percentage of your business comes from referrals?**

**What percentage of your business comes from advertising?**

**What percentage of your business comes from networking?**

**What percentage of your business comes from cold contact?**

**What percentage of your business comes from word-of-mouth?**

**Who are your top 3 competitors:**

1

2

3

**How does your pricing compare to your top 3 competitors?**

1

2

3

**What do you currently measure to check the profitability and productivity of your business?**

**Do you have a CRM (Customer Relationship Management tool)?**

If so, which one?

**Number of staff/contractors employed:**

How many of these people would you employ again in a heartbeat?

Number of outstanding performers among staff/contractors:

Number of poor to average performers among staff/contractors:

**Do you have a current business plan?**

**Do you have a current marketing plan?**

**Do you have a referral marketing strategy?**

**Which business books have you read in the last 12 months?**

**What did you do in the last 12 months to hone your skills?**

**How do you currently measure your return on investment from marketing?**

**If you were to collaborate with other business owners, to win more business, specifically which types of businesses would share your ideal customer?**

**What are you doing to increase your visibility in the market place?**

**Where do you display customer testimonials?**

**Do you have written or video customer testimonials?**

**Which type of businesses do you naturally refer your clients to?**

**Looking at your answers to the above questions, let's do a reality check...**

If you had to score yourself on a scale of 1 - 10, where 1 is you suck, and 10 is you're all over it, how do you rate?

1      2      3      4      5      6      7      8      9      10